

Letter of Intent

To help ensure the continuation of vital community services provided by United Way and United Way community partners, I/we intend to include United Way of Portage County Endowment in my/our estate plan. I/We acknowledge my/our strong belief and confidence in United Way by making a qualifying commitment as indicated below:

- () I/We have made a provision for the United Way Endowment of the United Way of Portage County, Inc. in my/our will (or other financial estate planning document).
- () I/We will include the United Way Endowment of the United Way of Portage County, Inc. in my/our will or other financial estate planning document and will notify you when my/our plans are completed.

I. METHOD

I/We plan to make a provision for United Way of Portage County Endowment as indicated below:

- () A Bequest in my/our Will or Living Trust
- () A Charitable Remainder Trust
- () A Gift of Securities
- () A Life Insurance Policy
- () Other, please specify: _____

Estimated Gift Amount: _____

Please note that completion of this line is optional; however, it will help United Way of Portage County to better plan for the future

II. GIFT PREFERENCE

- () Endow my annual gift to United Way
- () Donor restricted endowment (please work with United Way regarding restrictions)
- () Other, please specify: _____

III. RECOGNITION

- () I/We authorize recognition as an Endowment Letter of Intent contributor or Endowment gift contributor in the annual United Way Stevens Society Roster brochure.
- () I/We prefer that this gift remain anonymous.

IV. CONTACT INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signature

Date

Although this Letter of Intent is not a legal obligation and may be changed at my/our discretion, it has been made in good faith as a commitment to the United Way of Portage County Endowment.

Suggested bequest language: United Way Endowment of United Way of Portage County, Inc. is a 501(c)(3) organization (Federal Id # 39-0831152)

FOR MORE INFORMATION – CONTACT:

Fred Hebblewhite: Director of Resource Development
United Way of Portage County, Inc.
1100 Centerpoint Drive, Stevens Point, WI 54481

Direct Phone Number: 715-254-2182
Office Phone Number: 715-341-6740
Email Address: fhebblewhite@unitedwaypoco.org