



United Way
of Portage County



United Way of Portage County
Endowment

LETTER OF INTENT

To ensure **United Way of Portage County, Inc.** can provide funding to serve the most current, critical needs of our community's most vulnerable populations with programs that provide measurable results now and into the future, I/we intend to include **United Way Endowment** my/our estate plan. I/we acknowledge my/our strong belief and confidence in United Way with a qualifying commitment as indicated below:

- () I/We have made a provision for **United Way Endowment of United Way of Portage County, Inc.** in my/our will (or other financial estate planning document).
- () I/We will include **United Way Endowment of 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 Endowment** as indicated below:

(Check all that apply)

- () Outright Cash Gift
- () Bequest in Will/Trust
- () Gift of Appreciated Securities
- () Gift of Property
- () Other, please specify: _____
- () Qualified Charitable Distribution (QCDs)
- () Beneficiary Designation (i.e. IRA, 401K, Donor Advised Fund)
- () Life Insurance Policy
- () Life Income Gift (i.e. charitable remainder trust or annuity)

II. ESTIMATED GIFT AMOUNT

() \$ _____ Other: _____

**Please note that including a gift amount is optional; however, it will help United Way to better plan for the future.*

III. RECOGNITION

- () I/we hope to inspire others to consider a gift to the **United Way Endowment**. Please acknowledge my/our Letter of Intent with other generous donors in recognition materials.
- () I/we prefer to remain anonymous.

IV. CONTACT INFORMATION (NAME AS YOU WOULD LIKE IT TO APPEAR IN RECOGNITION)

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signature

Date

Although this Letter of Intent is not a legal obligation and may be changed by either party at any time, it has been made in good faith as a commitment to the United Way of Portage County, Inc.

Note: United Way of Portage County, Inc. is a 501(c)(3) organization with Federal Id # 39-0831152. Be sure to include "United Way Endowment of United Way of Portage County, Inc." with any designations.

FOR MORE INFORMATION, CONTACT:

Kelly Caughlan, Resource Development/Endowment Manager
United Way of Portage County, Inc.
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