



BUILDING
A LEGACY
TOGETHER



UNITED WAY OF
GREATER ROCHESTER



CHANGE LIVES. BUILD YOUR LEGACY.

HELP ADDRESS OUR
COMMUNITY'S GREATEST NEEDS
FOR GENERATIONS TO COME.



WE KNOW HOW MUCH YOU CARE ABOUT MAKING
OUR COMMUNITY A BETTER PLACE.

*With United Way of Greater Rochester,
your planned gift is in good hands.*

*Since 1918, when George Eastman founded
United Way, we have been partnering
with friends and neighbors to build a legacy
of giving in our community.*

*When you invest in our region through
United Way, you magnify the
power of your gift by joining with others
to help solve community needs—
not only today, but for generations to come.*

*At the same time, you can meet your family,
business and charitable goals,
while also reducing your income taxes
and avoiding capital-gains taxes.*

*And, we make it easy for you—
as there are several ways to give.*



BURT AND JOAN AUGUST

*"We've been proud of the United Way's
Endowment Fund and we believe in it.
United Way has been an excellent example
for community change and progress. Ten to
15 years after we've passed, United Way
will be there."*

BENN AND SALLY FORSYTH

*"We chose a Charitable Gift Annuity because
we wish to use our gift to solve community
problems. United Way makes sure the
programs they fund produce results and
support our community. We like the aspect
that we can preserve our retirement yet be
sure a significant amount will end up with
United Way."*



*F*or more information about how we
can help you arrange
charitable gift funds, annuities,
or leave United Way in your will,
please contact
Diana Lauria at (585) 242-6544, or
by e-mail at diana.lauria@uwrochester.org.



TOM AND KELLY GILMAN

“My wife Kelly and I established our Charitable Gift Fund specifically for the purpose of teaching our children about philanthropy. I learned about the value of giving back to our community from my parents, and the United Way offered a good vehicle for us to pass this spirit of giving on to our sons.”

HELPING YOUR CLIENTS MEET THEIR GOALS

Creating a legacy is a very personal journey. As a financial advisor, you forge the way to make your clients' legacy goals a reality.

United Way is a solid investment that can help your clients achieve their philanthropy goals, making our community stronger for generations to come.

For more information about how your clients can arrange Charitable Gift Funds, Annuities, or leave United Way in a will, please contact Diana Lauria at (585) 242-6544, or by e-mail at diana.lauria@uwrochester.org.

Please visit our web site, www.uwrochester.org, to download useful forms and additional copies of our planned giving brochure.



FLEXIBILITY FOR OUR FUTURE'S GREATEST NEEDS, WHATEVER THEY MAY BE...

You'll make a marked difference not only today, but for generations to come, by donating to United Way's Endowment Fund.

By contributing to the Endowment Fund, you will continue to give back to the community and have a lasting, positive effect for decades to come.



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GIFTS BY WILL

By leaving a bequest to United Way of Greater Rochester, you will make a lasting contribution to our community. You can set aside a specific amount, a percentage of your total estate, or a share of the remainder after your gift to heirs.



GIFTS OF LIFE INSURANCE OR RETIREMENT PLAN BENEFITS

Naming United Way—and ultimately, our community—as a beneficiary on your life insurance policy or retirement plan is an easy way to help our community with little expense.



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GIFTS THAT GROW OVER TIME

Charitable Gift Funds (*also known as donor advised funds*) are a great way to support all of your philanthropic wishes while generating a return on your gift, which is then reinvested into your charities of choice. After making gifts of cash, securities, or other marketable assets to United Way, your contribution, along with any investment earnings accrued by your fund, is available for distribution at any time to any charity you choose.



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GIFTS THAT PAY YOU INCOME

Not only can you support our community, you can also provide for yourself and your loved ones both before and after your death. Life-income gifts, such as gift annuities, can provide you with an income stream and tax benefits while providing the community with the help it needs.



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