DONOR TESTIMONIAL

United Way is working to advance the common good by focusing on the building blocks for a better life – Education, Income and Health.

“Continued and dramatic change is on the horizon for all of us in our community and however we can positively impact the quality of people’s lives, especially our youth, is time and money well spent. Melanie and I have always cared deeply for the people we were privileged to work with and for the community in which we live. One way in reflecting that caring attitude has been to support our United Way of San Luis Obispo County and the Future in Bloom Society. Moving to action must start with examining our own hearts. We hope you will see it within yours to support this worthy cause.”

Ed and Melanie Halpin,
Future in Bloom Society Members

United Way of San Luis Obispo County Fights For Our Youth!

WE FIGHT FOR THEIR FUTURE:
225 Children are now enrolled in our IMAGINATION LIBRARY program and have learned to love reading at an early age.

WE FIGHT FOR FINANCIAL STABILITY:
600 High School seniors are learning personal finance skills through our MONEY TALKS program.

WE FIGHT FOR COMPASSIONATE LEADERS:
35 High School Students on our YOUTH BOARD are learning about philanthropy and leadership.

WE FIGHT TO PREPARE YOUTH FOR SUCCESS!

United Way of San Luis Obispo County
PO Box 14309
San Luis Obispo, CA 93401
UnitedWaySLO.org

HELP SUPPORT THE FUTURE OF CAUSES THAT ARE CLOSE TO YOUR HEART AND COMMUNITY.

FUTURE IN BLOOM SOCIETY
With your support, we can create structural change for our community, not just for today, but well into the future.

Ed and Melanie Halpin,
Future in Bloom Society Members
HOW TO INCLUDE UNITED WAY IN YOUR WILL OR ESTATE PLAN

It is easy to include United Way in your will or estate plans. Here are some of the common ways to do this. We would welcome the opportunity to talk with you about this, and we encourage you to speak to your attorney or financial advisor to finalize your plans. The threshold to be a Future in Bloom Society member is $10,000.

1. Name United Way as a beneficiary in your will.
A bequest provision can be included in your will or trust when you are creating it, or you can amend your existing documents.
This arrangement provides you with flexibility and control should your circumstances change. You can designate an exact amount or asset or a percentage of the assets in your will.

2. Make an outright gift of cash or appreciated stock or real estate.
This is an excellent plan for individuals or couples in the highest tax bracket, or those who have sold a business or received a significant bonus and could benefit from an immediate tax deduction.
For example: Mary and Bob Smith have a stock portfolio of highly appreciated stock. They decide to contribute stock they purchased many years ago for $50,000 that is now worth $100,000. Because this stock is being transferred to United Way, they will not have to pay capital gains tax, United Way will benefit and Mary and Bob will receive a significant income tax deduction.

3. Name United Way as the beneficiary of a retirement plan.
Perpetuating your gift through a retirement plan is simple, flexible and tax wise. The benefits of naming United Way as the beneficiary of a retirement account include:
• Avoiding potential double taxation on retirement funds gift to heirs
• Allowing you to continue to draw money out of your retirement account while you are living
• Providing you with the freedom to change your mind if your situation changes
• Giving you the satisfaction of knowing that your retirement funds will continue to impact lives of those in our community

4. Name United Way as the beneficiary of an existing/new life insurance policy.
This allows a donor to make a gift they might not otherwise be able to afford by paying the premium on a life insurance policy that will ultimately produce a gift for United Way. If United Way is named as the owner and beneficiary, the donor also receives a tax deduction for annual premiums.

5. Make a gift through a charitable gift annuity and receive payments for life.
If you would like to benefit from interest that is higher than you can obtain from CDs and money market accounts, a charitable gift annuity is an excellent gift option, especially if you are over 60 years old. You will receive annual payments for life and the remainder of the gift will benefit our community through United Way. The projected amount of the gift that would go to United Way is tax deductible.

We would welcome the opportunity to talk with you about extending your impact in our community well into the future, and to share information with you. Please let us know how we can be of assistance to you.

REQUEST LEGACY SOCIETY INFORMATION

We would welcome the opportunity to talk to you about extending your impact in our community well into the future, and to share information with you. Please let us know how we can be of assistance to you.

NAME:
STREET:
CITY/STATE/ZIP:
PHONE:
EMAIL:

☐ I WOULD LIKE SOMEONE TO CONTACT ME ABOUT HOW I CAN CONTINUE MY SUPPORT OF OUR COMMUNITY THROUGH THE FUTURE IN BLOOM SOCIETY OF UNITED WAY OF SAN LUIS OBISPO COUNTY.

☐ I HAVE ALREADY INCLUDED UNITED WAY OF SAN LUIS OBISPO COUNTY IN MY ESTATE PLANNING. PLEASE CONTACT ME SO I CAN SHARE MY PLANS WITH YOU AND BECOME A MEMBER OF THE FUTURE IN BLOOM SOCIETY.