

Tocqueville Legacy Circle

As a member of Tocqueville Society, you have already made an incredible investment in our community’s well-being. We invite you to make the next step and become a part of the Tocqueville Legacy Circle by endowing your annual gift and making an impact that will be felt during your lifetime — and for many generations to come.

How to Endow Your Gift

To perpetuate or “endow” your annual Tocqueville Society contribution, you would make a gift 25 times your annual gift. For example, if you wish to perpetuate a \$10,000 annual Tocqueville gift, you would make a commitment of \$250,000. Current gifts or a gift in your estate plan will be held in the United Way of Dane County Foundation, Inc. The income generated then pays your annual contribution.

The most common ways to endow your Tocqueville Society gift include making a gift of cash or appreciated stock or a grant from your DAF to establish a Named Fund and designating United Way of Dane County Foundation, Inc. as the beneficiary of a retirement account, life insurance policy or in your will. Many donors choose a combination of these options.

Options To Fulfill a Tocqueville Legacy Circle Commitment

- ✦ **Make a gift of cash or appreciated stock – in one or multiple payments.** You can contribute cash or transfer stock to United Way of Dane County Foundation, Inc. to establish a Named Fund.
- ✦ **Recommend grants from your Donor Advised Fund (DAF)** and include United Way Foundation in your legacy grant plans.
- ✦ **Designate United Way of Dane County Foundation, Inc. as beneficiary of a retirement account.** You would work with your retirement account administrator to make this designation.
- ✦ **Designate United Way of Dane County Foundation in your will.** You can designate a specific amount, a percentage or set up a contingency arrangement. You can modify an existing will to include United Way of Dane County Foundation, Inc. by adding a codicil or amendment.
- ✦ **Designate United Way of Dane County Foundation, Inc. the beneficiary of a new or existing life insurance policy.** You can modify an existing policy or take out a new policy. If a new policy, you should work with United Way so that all premiums you make are tax deductible. Life insurance is a particularly good option for Tocqueville donors in their 30s or 40s as premiums are lower. United Way Life is a national program.



Starting with the Red Feather campaign as an elementary school student, progressing to workplace giving and as a trustee for the Jack DeLoss Taylor Trust, I saw United Way’s impact and saw the value in participating. As I became more established in my career, it was natural to join the Tocqueville Society. As I approached retirement, it was important for Peggy and me to continue our support forever in the Tocqueville Legacy Circle.

Chris Bugg,
Tocqueville Legacy Circle Member

There are several ways to give; what’s best for you will depend on your personal and financial situation. We encourage you to consult with your financial planner and/or attorney, and we’re happy to join the conversation as needed.

If you have questions about the Tocqueville Legacy Circle or wish to notify us of your plans, please call **(608) 246-4399** or email foundation@uwdc.org.

Legal name: United Way of Dane County Foundation, Inc.

EIN: 39-0817532

