

“ Our family supports United Way because of their unwavering commitment to creating lasting change in our communities. It’s not just about giving today: it’s about building a foundation of support that will uplift our community for years to come. Through United Way, we are proud to be part of a movement that empowers individuals, strengthens families and creates a brighter future for all. ”

Meg Prestigiacomo,
*United Way of Dane County
Foundation Donor*



We welcome the opportunity to work with you and your independent tax or legal advisor to identify a giving method that best meets your financial, philanthropic and timing needs.

If you’ve already included United Way Foundation in your estate plans, thank you for taking care of our community’s future well-being. Please let us know so that we can ensure that your gift will be used as you intended and can acknowledge your kindness in the way you prefer. We are so grateful.

For more information on making a gift, to notify us of your existing plans or to connect with United Way, please contact:

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

EIN: 39-1763471



Creating Lasting Impact

United Way of Dane County Foundation



For more than 100 years, United Way of Dane County has mobilized the caring power of our community to close gaps and open opportunities so all can thrive. The United Way Foundation has provided an ongoing steady base of support for this work since its incorporation in 1993, ensuring that caring donors can positively impact Dane County for generations to come. We invite you to partner with United Way Foundation to extend your legacy of effective, local philanthropy.

Your investment in United Way of Dane County Foundation can happen in a number of ways, over time and for multiple reasons. We look forward to learning about your philanthropic goals and discussing how our Foundation can partner with you to best serve the community's needs, too. Here are some common approaches.

Endow Your Annual Gift

Campaign donors can endow their support with a contribution of 25 times their annual gift. Your cumulative United Way giving may represent your largest community donation, and we'd be grateful to celebrate your future impact.

The Tocqueville Legacy Circle (TLC) recognizes current and future commitments of \$250,000 or more to endow Tocqueville Society gifts (annual campaign support of \$10,000+). TLC members are recognized in perpetuity.

Named Funds

Establish a Named Fund with a donation of \$5,000 or more, contributed within ten years. Your donation can be made with a one-time or multi-year pledge. We will work with you to confirm the purpose of your fund with a formal agreement.

Funds have been created by individuals, families, workplaces and affinity groups.

You may also contribute to an existing fund that provides ongoing support for United Way's focus areas such as Youth Opportunity or the HIRE Initiative.

Affordable Housing Fund

United Way's Affordable Housing Fund is managed by our Foundation with a volunteer committee. Instead of an endowment, this revolving loan fund supports our work to create family housing stability. Loans to developers help remove a financing gap and help generate more housing as the loans are repaid. This innovative and sustainable approach has invested donors' gifts to create hundreds of new units since 2018.



Estate Gifts

Including United Way of Dane County Foundation, Inc. in your estate plans may be the easiest way to make a significant gift, and it won't affect your financial situation today.

A charitable gift in your will or trust can be a specific amount, percentage of your estate or the remainder.

As little as one sentence in your will is all it takes to state your intentions. This is the most common planned gift. An easy way to start is by using resources available through FreeWill. You can state your charitable giving intentions at www.freewill.com by noting United Way of Dane County.

You can designate United Way Foundation as a beneficiary of your retirement plan, bank account, CD and life insurance. Update your beneficiary forms and your financial institution's transfer on death form.

United Way Life is a program designed to help donors endow their annual gift, making United Way of Dane County Foundation, Inc. the owner and beneficiary of a new life insurance policy.

Gifts During Your Lifetime

Cash is an ongoing option for gifts of all amounts.

Stocks, bonds, real estate and other property that have increased in value since you first purchased them make it possible to give a larger donation for less cost — and provide you with tax benefits.

Donor Advised Funds

Many people choose to support nonprofits by giving from an established Donor Advised Fund (DAF). United Way Foundation is pleased to be a recipient of current DAF grants. We also encourage you to determine

your legacy grant plan designations and to include United Way Foundation for future support.

Split Interest Gifts allow for a portion to go to charity and a portion to benefit you or your designee.

Download sample documents, such as a letter of intent and language to include in your will from our website: unitedwaydaneconomy.org/foundation. Our website also offers an option to donate online for one-time gifts and/or to add to an existing fund.

We are honored to receive gifts in celebration of personal and professional milestones such as birthdays, retirements and weddings. Donations made in memory of community members continue a caring legacy.

