



# FOREVER UNITED

## A Legacy Society

United Way has responded to the most pressing needs of our community for more than six decades. By joining our FOREVER UNITED legacy society, you ensure that no matter when your gift is made, it will meet the top priorities facing local individuals and families here in Harrisonburg and Rockingham County.

It's easy to make a legacy gift to United Way. Popular options include:

### **Will or Living Trust Gifts**

A bequest provision can be included in your will when you draft it or as a codicil amending your existing will. This arrangement provides you with flexibility and control should your circumstances change. You can designate an exact amount, an asset, or a percentage of the assets in your estate.

### **Retirement Plan or Life Insurance Gifts**

You can select United Way as a beneficiary of a portion or any balances remaining in your retirement or life insurance plans. This includes qualified charitable distributions (QCD) from an IRA. The QCD allows donors 70½ or older to transfer up to \$100,000 directly from their IRA to United Way on an annual basis.

### **Securities Gifts**

Use publicly traded securities or other appreciated assets to make your gift to United Way. Donating assets with a low cost basis often result in significant tax advantages in comparison to a cash gift.



United Way of Harrisonburg  
and Rockingham County

For more information, please contact Amanda Leech  
[amanda.leech@uwhr.org](mailto:amanda.leech@uwhr.org), 540-434-6639 X102

For reference, United Way of Harrisonburg & Rockingham County's  
Tax ID Number is 54-0632716

# FOREVER UNITED

## A Legacy Society

I have already included United Way of Harrisonburg and Rockingham County in my estate plans

I would like more information. Please follow-up with me via:  Phone  Email

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

If you have already included United Way in your estate planning, please fill out the form below so that we may document your intent for our records . All information provided is regarded as confidential.

Please briefly describe provisions in your estate plans, life insurance, or charitable trust.

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Please estimate gift amount if you are comfortable disclosing: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

I/We wish that our gift remain anonymous.

Please return form to: United Way of Harrisonburg & Rockingham County  
P.O. Box 326, Harrisonburg, VA 22803



**United Way of Harrisonburg  
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