

Real impact, right here at home.

All planned gifts to United Way support our Fund for Transformation and Resilience. This permanent fund addresses critical community needs, responds to unexpected crises, and invests in innovative solutions — creating real impact right here at home.

Through your planned gift, you help strengthen the lives of our neighbors across the region while ensuring United Way's grantmaking remains strong for generations to come.



Vital for the future.

Planned giving makes it possible for you to enjoy your assets during your lifetime while using your estate to support United Way's innovative and high-impact work in our region. You retain your current wealth while your foresight strengthens the safety net for future generations, guaranteeing that your community thrives far beyond the next generation.



UNITED WAY
of Southwestern
Pennsylvania

Take the next step.

Talk with your financial advisor about how you can include United Way of Southwestern Pennsylvania in your estate plan. Ask them to contact Linda Jones linda.jones@unitedwayswpa.org or Lisa Kelly lisa.kelly@unitedwayswpa.org at United Way of Southwestern Pennsylvania to start the conversation.



FOREVER UNITED.

A legacy that strengthens
the community you love.

With your support, our community
will remain **Forever United**.

UnitedWaySWPA.org/forever-united



UNITED WAY
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Pennsylvania



Live your values.

Your contributions create immediate and meaningful change in our region. If you believe that everyone deserves stability, opportunity and access to vital resources, you can live your values through a planned gift that benefits United Way.



Ways to give.

There are several simple ways to include United Way in your estate plans.

➤ **Wills & bequests:** Include United Way in your will or living trust to make a lasting gift without impacting your assets during your lifetime.

➤ **Donor-advised funds (DAFs):** Name United Way as a beneficiary of your DAF to extend your philanthropy beyond your lifetime.

➤ **Qualified charitable distributions (QCDs):** Make direct gifts from your IRA, reducing taxable income while supporting your community.

➤ **Retirement plan assets:** Gain significant tax benefits by naming United Way a beneficiary of your retirement accounts.

➤ **Life insurance:** Name United Way as a beneficiary — or transfer ownership — of a new or existing life insurance policy. Premium payments may qualify for a charitable deduction.

➤ **Charitable trusts:** Charitable Remainder Trusts (CRUTs) and Charitable Remainder Annuity Trusts (CRATs) can provide tax benefits to you, income to United Way and options to also provide for your heirs.

A community united by generosity and purpose.

United Way donors are among the most engaged and committed supporters of our region. As part of this group, you and your family may have opportunities to participate in:

- **Volunteer experiences** that bring your legacy to life.
- **Educational and social events** designed for philanthropists who want to deepen their local impact.
- **Networking** with other respected community leaders across the region.



Forever United.

By making United Way part of your legacy, you ensure your generosity endures in the community you call home. Together, we can create lasting change — today, tomorrow and for generations to come.