

MANAGING WEALTH. CREATING CHANGE.

Help your clients create a lasting legacy that impacts lives.

For 100 years, United Way of Southwestern Pennsylvania has been a philanthropic leader—trusted, respected and deeply rooted in this community. When you guide your clients toward a planned gift with United Way, you can be confident their legacy will be in the most reliable hands.

Unlike many other philanthropic endowments, United Way puts gifts to work quickly upon estate settlement, creating immediate impact in the lives of families and neighbors across our region. At the same time, we provide a meaningful network for donors through year-round educational, social and volunteer events. These experiences deepen donor engagement and reinforce the trusted advisor-client relationship.

By partnering with United Way, you extend your guidance beyond managing wealth to creating lasting change.

Planned giving conversations often begin with values. United Way gives advisors a trusted, locally relevant way to help clients articulate what matters most to them — and translate those values into lasting impact within the community they call home.

Why United Way?

United Way of Southwestern Pennsylvania connects the collective power of giving to the region's most pressing needs. Through our network of agency partners, we serve more than 750,000 people each year. Our 24/7 PA 211 helpline connects people in crisis with agencies providing food, housing and other essentials. And, in our role as a convener, we bring leaders together to drive long-term solutions.

As one of the region's largest and most established philanthropic partners, United Way offers the continuity, accountability and local credibility advisors look for when



guiding legacy and estate conversations. Our grantmaking is rooted in deep community knowledge, rigorous oversight and nearly a century of trusted stewardship.

A trusted partner for advisors.

We understand that your client relationships are built on trust. United Way supports the philanthropic goals you help your clients define, providing meaningful giving options without disrupting the advisor-client relationship. We do not manage client assets or insert ourselves into advisory decisions. Instead, we serve as a charitable partner that complements your guidance and reinforces the trust you've built.

Many of the region's leading wealth managers already support United Way — not only as advisors, but as donors themselves. They choose the same trusted partner for their own families that they recommend to clients because they're confident in United Way's impact, stewardship and long-term vision.

Let's talk.

You already know the great work of United Way. Let us help you be more responsive to your clients' charitable goals. **Contact Linda Jones (linda.jones@uwsipa.org) or Lisa Kelly (lisa.kelly@uwsipa.org) at United Way of Southwestern Pennsylvania to start the conversation.**