



TRIDENT UNITED WAY LEGACY SOCIETY

Planned Gift Donor Intent Form

To continue to advance the mission of serving the Tri-County community today, tomorrow and for future generations, I/we have made, or intend to make a planned gift to the Endowment Fund of Trident United Way in the amount of \$_____

(Optional)

My/our gift will be made by:	Circle One:	Estimated Amount:
_____ Bequests in Will or Living Trusts	Amount / Percentage	_____
_____ Charitable Gift Annuities	Amount / Percentage	_____
_____ Charitable Lead Trusts	Amount / Percentage	_____
_____ Charitable Remainder Trusts	Amount / Percentage	_____
_____ Gifts of Plans and Policies	Amount / Percentage	_____
_____ Life Insurance Policies	Amount / Percentage	_____
_____ Real Estate Gifts	Amount / Percentage	_____
_____ Life Estate Gifts	Amount / Percentage	_____
_____ other endowment gift (Please describe): _____		

Planned gifts of \$200,000 or more will be recognized nationally as **Tocqueville Legacy Circle.*

Endowment Bucket Designation (see descriptions on next page)

- _____ Greatest & Emerging Community Needs
- _____ Helping Children & Families Thrive
- _____ Increasing Capacity & Innovation for Tomorrow

Recognition

Please list my/our name as follows in digital or printed United Way publications:

(e.g. Joseph Smith, Mr. and Mrs. Joe Smith, Ann and Joe Smith, etc.)

_____ I/we wish to remain anonymous.

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ E-mail: _____ E-mail : _____

Please provide any details you wish to share about your gift: _____

Signature: _____ Date: _____



TRIDENT UNITED WAY ENDOWMENT

Trident United Way's endowment exists to meet the urgent needs of Tri-County children and families today, while simultaneously investing resources to address the future challenges of tomorrow. The endowment fund consists of the three categories below:

Greatest & Emerging Community Needs

This unrestricted bucket contains dedicated resources for future Trident United Way board leadership to use in addressing the most pressing needs in the community, whatever they may be. This fund is available for the board to use as it sees fit. Trident United Way's Emergency & Natural Disaster Fund is housed in this bucket.

Helping Children & Families Thrive

This funding is set aside specifically for supporting Tri-County children, families, and seniors through core mission programs and services. These services include Resource Connection Centers, early learning initiatives, pre-school programs, food access and hunger relief programs, housing, healthcare, transportation, and special initiatives in support of veterans and individuals with disabilities. **Specific funding initiatives will evolve as community priorities change and progress is achieved. Any funds endowed for a specific program that becomes obsolete shall be redirected to a closely aligned purpose, even as program models and goals shift.*

Increasing Capacity & Innovation for Tomorrow

This funding is designated for the essential organizational needs and human capital of Trident United Way and its agency partners. Resources set aside for overhead and administrative expenses are crucial to offset inflation, provide salaries and benefits, and prevent disruption of mission delivery during times of revenue decline. Whether it be to endow a particular position within the organization, or cover building repairs, these funds will free up annual fundraising efforts to be used for pressing mission purposes, including training and development, and supporting best practices.