



Thank you for your support of the United Way of the Columbia-Willamette (UWCW). We are honored to be a part of your legacy.

Your partnership sustains our mission to improve lives, strengthen communities and advance equity by mobilizing the caring power of people across our region. By informing us of your intention to include UWCW in your estate plans, you enable us to acknowledge your generous commitment, while also empowering us to make bold, strategic plans for the future of our community.

Please tell us about yourself

Name_____

Address_____ City_____ State_____
ZIP_____

Email_____ Birthdate *(month/date only if preferred)*_____

Home Phone_____

Cell Phone_____

We would be very grateful to hear about why you support UWCW and how it's meaningful to you.

Please tell us about how you would like your gift to be recognized as we advance the mission of UWCW. This will help us to ensure that your wishes are honored at the time your gift is received.

I would like UWCW to apply my contribution to the area of most need or opportunity.
_____%

I would like to restrict my gift to the United Way of the Columbia-Willamette Endowment Fund, to be used for generations to come and contribute sustainable funding to my community.
_____%

I am making this gift In honor of In memory
of_____

We would deeply appreciate some basic information on your gift, which will help in our strategic planning for the future. Please provide as much information as you are comfortable sharing.

It is my intent to leave a legacy for United Way of the Columbia-Willamette through my:

Will Trust Retirement Account Life Insurance Policy
Other_____

Estimated value of your legacy gift

- Specific Amount _____
- Percentage of estate _____ % Estimated to be \$ _____

Is UWCW a Primary or Contingent beneficiary?

**United Way of the
Columbia-Willamette**



YOUR LEGACY AT UNITED WAY
Individual Planned Gift Notification Form

Legacy Circle recognition

We consider all supporters who include a gift of any amount to UWCW in their estate plans to be honored members of our Legacy Circle. If you choose to grant permission to be listed as a Legacy Circle member in UWCW collateral, your commitment can inspire others to consider their own legacies. We hope you will allow us to recognize and celebrate your generous gift.

- I authorize including my name in UWCW's publications in the list of Legacy Circle members as a motivation for others to leave a future gift to benefit United Way of the Columbia-Willamette.

Please

list as:

Please clearly print or type as it should appear

- I prefer to remain anonymous, while enjoying the other benefits of Legacy Circle membership.

Additional information

It's especially helpful to have a copy of the portion of your will/trust/beneficiary designation form that pertains to your gift to United Way of the Columbia-Willamette. It helps to ensure that we receive your intended gift and fulfill your wishes.

- Please check this box if you are attaching documentation for our files.

Signature

Date

At UWCW, we recognize that values of deferred gifts as well as the provisions themselves may change over time. Your signature verifies only that the above information is accurate as of this date and does not represent a binding legal commitment to UWCW. Please inform us should you update your gift plans to ensure it is administered in the way you intend.

Return to

Michelle House, Director of Gift Processing
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Portland, OR 97205
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United Way of the Columbia-Willamette Tax ID#: 93-0582124

Internal – SOP – Copy to fileserve, Copy to VP Finance, Attach to donor's Salesforce record