



United Way of Pasco County Planned Giving Program

How to Include United Way in Your Will or Estate Plan

It is easy to include United Way in your will or estate plans. Here are 4 of the most popular ways to do this. We would welcome the opportunity to send you additional information or meet with you.

1. Name United Way as a beneficiary in your will – A bequest provision can be included in your will when you are creating it, or you can amend your existing will. This arrangement is flexible and you can designate an exact amount or asset or a percentage of the assets in your will.

2. Make an outright gift of cash or appreciated stock or real estate – This is a good option for individuals in the highest tax bracket or those who have sold a business or received a significant bonus and could benefit from immediate tax deductions.

3. Name United Way as the beneficiary of a retirement plan – Giving a gift through your retirement plan is simple, flexible and tax wise. Contact the administrator of your retirement plan to designate United Way as the beneficiary of your retirement plan.

4. Name United Way as the beneficiary of an existing or new life insurance policy – Many contributors are attracted to this option since it allows them to make a larger gift than they would otherwise have been able to make.

WORK WITH YOUR PERSONAL ADVISOR. YOUR DECISION TO MAKE A GIFT TO UNITED WAY IS A PERSONAL ONE. United Way is available to assist you and your advisors with a thoughtful, charitable plan.

If you have not included United Way in your estate plans, but would like to learn more about how a planned gift might benefit you and United Way, please fill out your information and mail today to the address at the bottom of the page. Or, call the Resource Development Department at 727-835-2029 and ask about Planned Giving. All conversations will be held in confidence and will not obligate you in anyway.

NAME		
STREET		
CITY	STATE	ZIP
HOME PHONE	WORK PHONE	
EMAIL ADDRESS		

Please Mail Your Information To:
United Way of Pasco County, 8040 Washington Street, #100, Port Richey, FL 34673