



**United Way Legacy Society Membership Form**

Thank you for your strong support of **Greater Twin Cities United Way (Tax ID #41-1973442)**. You are part of a forward-thinking group of caring community members who choose to include United Way as part of your legacy. Please take a moment to complete this brief survey. Be assured we will treat this information with the utmost confidentiality and respect.

1. Have you included, or do you intend to include, Greater Twin Cities United Way in your will or estate plan, or named it as a beneficiary of your retirement plan or life insurance policy? (If 'No' skip to question 3.)

Yes  No

2. Thank you for including United Way in your estate plan! If you haven't already informed us, or if your plans have changed, please describe your gift with as much detail as you are comfortable sharing. We recognize that many estate gifts are revocable, are subject to unknown future personal and financial considerations, and can be modified at any time.

*Will*      *Trust*      *Retirement Plan Assets*      *Life Insurance*      *Other* \_\_\_\_\_

*We realize it is often difficult to place a value on your future gift. We kindly ask you to consider providing your estimate of the value of that gift as if it were received at today's value. Your documentation allows us to count this gift at face value for the Centennial Campaign.*

**The value of my gift is \$ \_\_\_\_\_ or falls within the following range:**

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> \$1,000-\$9,999   | <input type="checkbox"/> \$50,000-\$99,999   | <input type="checkbox"/> \$500,000-\$999,999     |
| <input type="checkbox"/> \$10,000-\$24,999 | <input type="checkbox"/> \$100,000-\$249,999 | <input type="checkbox"/> \$1,000,000-\$4,999,999 |
| <input type="checkbox"/> \$25,000-\$49,999 | <input type="checkbox"/> \$250,000-\$499,999 | <input type="checkbox"/> \$5,000,000-\$9,999,999 |

*All donors of future gifts to United Way are recognized as members of the United Way Legacy Society, regardless of the amount. We hope you will allow us to recognize your generosity and to list your name(s) as an inspiration to others. Please indicate how your name(s) should appear on any recognition material and annual donor roster:*

Please do not list my/our name(s) in any donor rosters or publications.

3. Would you like more information about any of the following? (Check all that interest you):

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> Bequests                    | <input type="checkbox"/> Life Insurance              | <input type="checkbox"/> Charitable Gift Annuities | <input type="checkbox"/> Gifts of Real Estate |
| <input type="checkbox"/> Charitable remainder trusts | <input type="checkbox"/> Gifts from Retirement plans | <input type="checkbox"/> Estate Planning Seminars  |   |

**Name(s):** \_\_\_\_\_

**Birth Date(s):** \_\_\_\_\_

**Today's Date:** \_\_\_\_\_

**THANK YOU** for taking time to complete this form!

For more information, or to establish an endowment to support a specific area, please contact:

**Marie Ruzek, JD, CFRE**  
Director, Planned Giving  
612-340-7489 | [marie.ruzek@gtcuw.org](mailto:marie.ruzek@gtcuw.org)  
[www.gtcuw.org/give](http://www.gtcuw.org/give)

*This gift documentation is non-binding and in no way makes me or my estate legally or morally obligated to fulfill this intention if I choose to modify or cancel this planned gift at a later date.*