

DECLARATION OF INTENT TO MAKE A GIFT

This is to inform you that I/we have included a planned gift to United Way of Greater Cleveland in my/our estate plan.

SPECIFICS ARE AS FOLLOWS:

1. I/We accept membership in the Legacy Society through the following (please indicate the form of your planned gift below):

- Will bequest
 IRA/Retirement plan beneficiary designation
 Charitable remainder trust
 Charitable gift annuity
 Life insurance beneficiary
 Other: _____
 • Gift of policy to United Way
 • Designation of United Way as a beneficiary of policy

2. The estimated value of my/our future gift to United Way of Greater Cleveland is \$ _____

3. (Please choose A or B)

- A. I/We would be pleased to be recognized by the Legacy Society in United Way publications to serve as encouragement for others to give.
 My/Our name(s) should appear as: _____
- B. I/We prefer to remain anonymous

CONTACT INFORMATION:

Name(s): _____

Home Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email address: _____

Professional Financial Adviser: _____ Phone: _____

Signature: _____ Date: _____

Print, sign and return or click here to authorize document without signature

QUESTIONS?

Please contact Ms. Tanzie Adams, Director, Planned Giving Programs at 216-436-2193 or tadams@unitedwaycleveland.org.

PLEASE RETURN TO:

United Way of Greater Cleveland, Attn: Legacy Society, 1331 Euclid Avenue, Cleveland, OH 44115.
 Or fax to 216-436-2253 or email to tadams@unitedwaycleveland.org.

Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional financial adviser. United Way of Greater Cleveland is a tax-exempt, publicly funded nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID # 34-6516654. Contributions are deductible as allowed by law.

Thank you for your commitment to United Way's mission to advance education, financial stability and health in our community. We are proud to have your trust and support.