



LEAVE YOUR LOCAL LEGACY

Your support makes our mission possible: To unite our community with a shared aspiration for the future, one where every child can thrive, and families can break the cycle of financial hardship.

WHAT IS A PLANNED GIFT?

A future-focused way to support our mission. Many generous donors include these gifts in their will, aligning personal goals with lasting community impact.

WHY DOES YOUR PLANNED GIFT MATTER?

Our \$22 million, board-directed, professionally managed endowment provides both current and future support. We generally direct planned gifts direct them to endowment, which grows with each planned gift, providing increased annual support for our mission.

HOW DOES YOUR PLANNED GIFT MAKE AN IMPACT?

Our endowment is mostly made up of planned gifts. Since the 1980s, it has provided a stable source of operating income, allowing annual gifts to go directly toward current community impact.

WHY LET US KNOW ABOUT YOUR GIFT?

Letting us know helps us make plans and ensures we put your gift to use as you want us to.

MAKING YOUR PLANNED GIFT

Reach out to our Philanthropy team at generosity@uwchatt.org or give us a call at **423-752-0344**. You can also learn more on our website at unitedwaycha.org/planyourgiving. Thank you!





HOW TO MAKE A PLANNED GIFT

Many donors choose to include a legacy gift in their estate plans that supports United Way's future. Planned gifts celebrate our past work and help grow our future impact. If you're considering a planned gift, here are simple ways to leave your legacy. Thank you!

WAYS TO MAKE A PLANNED GIFT

Through your estate:

- A bequest in your will
- Life insurance beneficiary designation
- Retirement account beneficiary designation

By planning lifetime gifts:

- Gifts of appreciate stock
- IRA charitable distributions
- Charitable lead or remainder trusts
- Donor Advised Fund grants

BEQUEST LANGUAGE EXAMPLES

- **Specific:** "I give the greater of \$X or X% of my estate to United Way of Greater Chattanooga."
- **Residuary:** "I give the rest and remainder of my estate to United Way of Greater Chattanooga."

DOCUMENTING YOUR GIFT

Letting us know your plans ensures your wishes are honored. Send a brief note describing your gift and intentions—we'll confirm and follow up with gratitude.

ABOUT THE UNITED WAY OF GREATER CHATTANOOGA

- **Legal Name:** United Way of Greater Chattanooga
- **Tax ID:** 62-0565962
- **Address:** 630 Market Street, Chattanooga, TN 37402

MAKING YOUR PLANNED GIFT

Our philanthropy team is happy to discuss options as you explore making a planned gift. Please reach out to us at generosity@unitedwaycha.org or 423-752-0344. Thank you!