# THE TOMORR V FUND

A LASTING LEGACY

### The Future is Ours to Give

The Tomorrow Fund<sup>™</sup> – United Way's endowment fund and planned giving program – offers an opportunity to leave a lasting legacy for a stronger region, a vibrant community and a better tomorrow for generations to come.

### Who We Are

United Way of the Alberta Capital Region's history is filled with stories of men and women who had a vision for tomorrow. For decades, people have come together to create safe, healthy and stable communities. As times have changed, so have the needs of our region.

United Way of the Alberta Capital Region is an organization that helps donors achieve their philanthropic dreams – now and in the future. We know that we have the most significant impact when we act together. Our strong, vibrant communities develop because people like you are willing to invest your time and resources to sustain and strengthen them. In support of this, United Way created The Tomorrow Fund<sup>™</sup>. This fund is a way for individuals to help support our growing community and ensure that the pathway out of poverty is sustained for the generations to come.



A gift to The Tomorrow Fund<sup>™</sup> will be a lasting legacy to your community that will work on your behalf – year after year.



### Gift in a Will

Elaine was volunteering for United Way in 1992, speaking to companies about the importance of being involved in our community, when her presentation suddenly became much more personal. Unbeknownst to her, the United Way video featured someone she knew very well who had suffered a devastating loss and had been helped through the grieving process by a United Way funded partner.

It was a moment Elaine will never forget. It was also the moment that cemented Elaine's commitment to United Way. "I said to myself, 'If United Way can do this for her, they have me for as long as they need me.'" Today, Elaine is a long-time United Way donor. She's passionate about contributing to initiatives that are close to her heart, especially helping children.

"Having raised a family here, it's really important to me that all kids benefit from the advantages that the Alberta Capital Region offers. Every child should have the tools that they need and be well fed so they can go to school and study."

Recently, Elaine and her husband, Ron, decided to name United Way in their will, citing confidence in United Way's ability to wisely invest their bequest. 'Having raised a family here, it's really important to me that all kids benefit from the advantages that the Alberta Capital Region offers.'

– Elaine, long-time United Way donor



### Endowment Gift

I grew up in a small town in Saskatchewan where volunteering and giving back to your community was a way of life. My parents have always led by example and, in our family, giving back and doing for others was a lesson they taught us, by example, when my siblings and I were very young. To this day, my parents are still actively involved in their community.

As a past chair of United Way's annual campaign and as a current United Way board member, I am working to uphold the values instilled in me as a youngster in the small-town of Major, Saskatchewan. But I wanted to give more – to do more – because I see how important it is to help create pathways out of poverty for vulnerable members of our community.

When my husband, Brian, and I discussed how we could maintain momentum and build on our investment in community, we felt that there was no better way than by initiating an endowment fund.

We believe there are solutions to poverty. An ongoing investment, which can grow over time in an endowment fund as well as a final gift in our will, means that we are always making a contribution, in addition to our regular annual donation. 'We are confident that United Way will continue to know the foremost needs of our community, year after year.'

 Bernie, past United Way campaign chair and current board member

#### Benefits of Endowment and Planned Giving

#### Capital Preservation

Because your original investment remains intact and only the income earned is used, your gift will keep on giving, year after year.

#### Recognition

We will work with you to provide appropriate and meaningful recognition for your gift.

#### 🗹 Tax Benefits

All donations qualify for a charitable tax credit provided by the provincial and federal governments.

#### Flexibility

Your gift can respond to a range of future community needs or can reflect your special interests.

#### Assurance

We ensure that your gift is directed to your area of interest and that your intentions are respected.



### How to Give

For more information about how you can integrate United Way into your estate plans, contact a Senior Advisor of Community Investments at 780-990-1000. They will be happy to help you choose the best way to make a gift that fulfills your needs, provides maximum tax benefit and creates a lasting legacy for generations to come.

We encourage you to seek the advice of your lawyer, financial advisor and your loved ones about the gifts and bequests you'd like to make prior to changing your will or estate plans. Life Insurance Policy

You can designate United Way as an owner and/or beneficiary of an insurance policy, in whole or in part.

## Gift of Securities

You can receive significant benefits for you or your estate through capital gains tax savings.

Bequest

Designate an amount or portion of your estate to United Way through your will. Real Estate

You can donate real estate and land, either giving it outright or retaining use of the property during your lifetime.

RRIF or RRSPs

You can designate United Way as a beneficiary of your qualified retirement plan.

### You Can Start Today

You don't need to be wealthy to create an endowment fund. You can begin contributing with an initial gift of \$1,000.

Once your endowment fund reaches \$10,000, it can be named for your family, a loved one, a friend or in any other way that is meaningful to you. United Way makes it easy to reach this target, by giving you up to 10 years to build your endowment fund. To learn more about naming your fund and to create a lasting legacy of your commitment to our community, please contact our Senior Advisors of Community Investment at United Way.

### United Way's Promise to You

Your enduring gift will continue to support your community for generations to come. You have our assurance that:

- United Way will use its trusted process of involving community volunteers and professional staff to allocate the income from the funds for maximum efficiency and effectiveness.
- United Way will monitor funding on a regular basis to ensure accountability for all funds contributed.

- The assets of your gift will be held by Edmonton Community Foundation.\* United Way's performance and disbursements are reported regularly to donors.
- United Way's low administration costs (always below 20%, as per a Board directive) will continue to be achieved due to its volunteers, in-kind gifts of products or services and sponsorship of events, programs, special initiatives and print publications.

<sup>\*</sup>Edmonton Community Foundation (ECF), like United Way, is recognized and acknowledged in the region for integrity, transparency and stewardship. Since 2007, United Way has been building its endowment fund with ECF under a unique and collaborative agreement.



Your gift has the power to inspire and transform our community. Thank you for making an impact for generations to come.

> A representative is available to answer any questions you may have.

Call 780-990-1000 or Email servicehub@myunitedway.ca

#### THE TOMORR©W FUND A LASTING LEGACY

A better tomorrow starts today – change starts with you.

Name:	C
Address:	
City:	C
Province: Postal Code:	
Home Phone:	
Other Phone (work/cell):	
Email Address:	_

I would like to discuss gift possibilities with a Senior Advisor in Community Investments.

I am pleased to advise you that I have already included a gift to United Way of the Alberta Capital Region in my will.



15132 Stony Plain Road Edmonton, AB, T5P 3Y3

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