



## United Way of Greater Milwaukee & Waukesha County Legacy Society

If you intend to make a lasting gift to our community through United Way of Greater Milwaukee & Waukesha County's Legacy Society, please share your intention with us by completing the form below.

We are so appreciative of your commitment to change lives and improve our community for generations to come through a Legacy gift. Thank you.

- ☐ I/We have made or will make the following gift(s) to United Way of Greater Milwaukee & Waukesha County (UWGMWC):
- ☐ Bequest in my will
  - ☐ Life insurance designating UWGMWC as ☐ Beneficiary ☐ Owner
  - ☐ Retirement Plan designating UWGMWC as a beneficiary
  - ☐ Life Income Gift to benefit me or my family (i.e., Charitable Gift Annuity, Charitable Remainder Trust)
  - ☐ An outright gift to the endowment (please specify)
    - ☐ Enclosed
    - ☐ I/We wish to make a multi-year pledge to the endowment (not to exceed 5 years) for a total of \$ \_\_\_\_\_ over \_\_\_\_\_ years.
    - ☐ I/We wish to establish a named endowment fund benefiting UWGMWC (minimum \$25,000)
  - ☐ Other Gift of: \_\_\_\_\_

Approximate or actual amount of gift: \$ \_\_\_\_\_

*Sharing the expected gift amount is optional but appreciated. If the gift amount is \$25,000 or higher, you have the opportunity to create an endowment fund in your name. United Way staff will follow up with you to clarify details.*

- ☐ I/We would like to discuss my/our gift with a representative from United Way.

*Legacy Society members with an expected gift of \$1,200 or more will be recognized in United Way of Greater Milwaukee & Waukesha County's annual Leadership Registry.*

- ☐ I/We would prefer our Legacy Society gift to remain anonymous and therefore be excluded from the listing in the annual United Way Leadership Registry.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

*This statement of intent is not legally binding and may be changed at the donor's discretion.*



**Questions?** Contact Jeriah Ebling at 414.263.8156 or via email at [jebling@unitedwaygmwc.org](mailto:jebling@unitedwaygmwc.org).

Please return this form to:  
United Way of Greater Milwaukee & Waukesha County  
Attn: Jeriah Ebling  
225 W. Vine Street  
Milwaukee, WI 53212

Or email/fax completed form:  
Jeriah Ebling  
[jebling@unitedwaygmwc.org](mailto:jebling@unitedwaygmwc.org)  
Fax: 414.263.8156

*Please note that a signed form or letter indicating your inclusion of United Way in your estate plan must be received by United Way of Greater Milwaukee & Waukesha County in order to be included as a member of the Legacy Society.*