



FOREVER UNITED

A Legacy Society

United Way has responded to the most pressing needs of our community for more than seven decades. By joining our FOREVER UNITED legacy society, you ensure that no matter when your gift is made, it will meet the top priorities facing local individuals and families here in Midland.

It's easy to make a legacy gift to United Way. Popular options include:

Will or Living Trust Gifts

A bequest provision can be included in your will when you draft it or as a codicil amending your existing will. This arrangement provides you with flexibility and control should your circumstances change. You can designate an exact amount, an asset, or a percentage of the assets in your estate.

Retirement Plan or Life Insurance Gifts

You can select United Way as a beneficiary of a portion or any balances remaining in your retirement or life insurance plans. This includes qualified charitable distributions (QCD) from an IRA. The QCD allows donors 70½ or older to transfer up to \$100,000 directly from their IRA to United Way on an annual basis.

Securities Gifts

Use publicly traded securities or other appreciated assets to make your gift to United Way. Donating assets with a low cost basis often result in significant tax advantages in comparison to a cash gift.



For more information, please contact J Don Wallace
jwallace@uwmidland.org or call 432-685-7713

For reference, United Way of Midland's
Tax ID Number is 75-0945926

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I have already included United Way of Midland in my estate plans.

I would like more information. Please follow-up with me via: Phone Email

Name: _____

Address: _____

Phone: _____ Email: _____

If you have already included United Way in your estate planning, please fill out the form below so that we may document your intent for our records. All information provided is regarded as confidential.

Please briefly describe provisions in your estate plans, life insurance, or charitable trust.

Please estimate gift amount if you are comfortable disclosing: _____

Signature: _____ Date: _____

I/We wish that our gift remain anonymous.

Please return form to:
United Way of Midland, 1209 W. Wall St., Midland, TX 79701, (432) 685-7700

