



A COMMUNITY LEGACY

CREATE YOUR LASTING LEGACY WITH UNITED WAY



INVEST. CONNECT. SERVE.



Build your personal legacy by giving a lifetime of support to future generations.



A planned gift with United Way is an incredible way to strengthen our community's future while also addressing your personal long-term estate-planning and community philanthropy goals.

The following options allow you to leave a legacy of community improvement—for the challenges we face today and the efforts to create a vibrant Rochester into the future:

- **Bequests** – Including United Way in your will is a simple and convenient way to create your personal legacy.
- **IRA or Life Insurance Policy Beneficiary** – Name United Way of Greater Rochester as the beneficiary on an Individual Retirement Account (IRA) or a Life Insurance Policy.
- **Charitable Gift Annuity (CGA)** – Enter into a CGA with United Way and receive a guaranteed lifetime annuity payment. The remainder value after passing will be added to the United Way of Greater Rochester endowment fund.
- **Life Insurance** – Gift United Way a new or existing insurance policy to provide a meaningful donation to address our community's most pressing challenges.
- **Real Estate** – Gifts of real estate, such as a house or farm, are generous and meaningful gifts. United Way's Board of Directors review and approve these donations to support future sustainability.

Learn more at uwrochester.org/plannedgiving.

United Way does not provide tax advice. Please consult a tax professional, financial planner, and/or attorney in regards to your personal circumstances and what option fits best to help meet your financial and philanthropic goals.

THE McCURDY SOCIETY

Thank you to the generous donors who include United Way of Greater Rochester in their estate plans. Named for Gilbert J.C. and Virginia Geier McCurdy, the McCurdy Society recognizes those who are committed to creating a legacy of community support for generations to come.

ABOUT UNITED WAY OF GREATER ROCHESTER

United Way harnesses the power of collective giving to create a thriving community. Together, we invest in solutions to critical local challenges, connect resources to unite communities, and work collaboratively to solve problems.

Be part of Rochester's future with an estate gift to United Way of Greater Rochester. For 100 years, starting with George Eastman, people have been remembering United Way. Every gift helps create opportunities for the next generation.



George Eastman at the beginning of his career

OUR MISSION

To unite the good will and resources of the Greater Rochester community so that everyone can thrive.

LEARN MORE

To discuss United Way planned giving options, please contact Julie Marsiglio, Director of Major Gifts, at 585 242-6465 or Julie.Marsiglio@uwrochester.org.

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