

CORNERSTONE SOCIETY

The Cornerstone Society honors those who have made a lifetime commitment to the United Way of the Tri-Valley Area. Members of the Society exemplify those who care about building a better community for generations to come.

Membership is extended to those who have made an outright gift or who have included UWTVA in their estate plans. Please let us know if you have included UWTVA in your will or estate plans as we would like to personally thank you and recognize you as a member of the Cornerstone Society alongside other members.

Also, your leadership reminds others that there are many ways to continue their support and improve lives in Greater Franklin County. Visit www.uwtva.org for a complete recognition list.

For more information and examples of ways you can give, please contact

United Way of the Tri-Valley Area

PO Box 126, 218 Fairbanks Rd., Farmington, Maine 04938

Phone 207.778.5048 Fax 207.779.0577

www.UWTVA.org/give

Proudly serving Franklin County and Livermore, Livermore Falls, Maine.



*This information in this brochure is not intended as legal advice.
Please consult an attorney or another financial professional for advice regarding your own circumstances.*

United Way of the Tri-Valley Area strives every day to support children and strengthen families; meet basic human needs; improve health; and increase independence and financial stability.



Leaving a Legacy

Please help United Way help others by making a planned gift. Together, we can create a better life for local children and families, today, and well into the future.





Planned Giving

Planned giving lets you create your own personal legacy in our community, while still preserving your financial security and providing a future for your family.

None of us can know precisely what types of future needs might emerge, but we assure you that your gift will be in good hands and used to make our region a better place to live, work and raise a family.

United Way of the Tri-Valley Area (UWTVA) strives to improve the lives of Greater Franklin County residents by funding programs coordinated by local non-profits like Literacy Volunteers and the Franklin County Children's Task Force. Thousands of people are also helped through its own initiatives that help people stay warm, save money, eat, and attend school with the tools they need.

UWTVA also offers prescription assistance through FamilyWize, and help is only a call or click away 24/7 at 2-1-1 Maine.

Giving Options

It is easy to include United Way in your estate plans. You might choose to make a gift now, or a gift later.

A Gift Now

CASH or STOCK

Contribute cash or appreciated stock to the Community Fund, designate your gift to an existing fund, or create a fund reflecting your personal interest, which you may name.

ENDOWED FUND

When you make a special endowed gift - usually 25 times your current annual giving level - you will support United Way of the Tri-Valley Area in perpetuity. Your gift will be invested in an endowment fund and a percentage of the annual earnings will be drawn each year to support vital programs. This is a good option if you are leaving a workplace and want to continue to support the community.

Planting the seeds for a bright future

Your gift to United Way of the Tri-Valley Area will stay local, and improve people's lives and build a strong and healthy community for years to come.

A Gift Later

IN MEMORIAM

Memorial gifts are a timeless gesture with long-lasting impact. Honor a loved one with an outright gift, or suggest others contribute to UWTVA in lieu of flowers at the time of a loved one's passing.

BEQUEST BY WILL

Wills are easy, revocable and low cost to create. Simply insert a simple clause that leaves an amount or percentage of your estate to United Way. Your gift may be unrestricted for general use or restricted for a specific purpose.

For example:

"I give, devise and bequeath to United Way of the Tri-Valley Area the sum of \$_____ in support of its general purposes."

BEQUEST BY TRUST

Through a trust created with a financial advisor, you may protect and benefit your family and still support those in need. You may choose to make a gift to United Way through a Charitable Lead Trust that instructs the trustee to make a contribution to United Way annually, or as a residual gift that benefits United Way at the end of the life of the trust through a Charitable Remainder Trust.

LIFE INSURANCE POLICY/ RETIREMENT PLAN

Name United Way as a beneficiary of an existing life insurance policy or retirement plan - such as a 401(k) or 403(b) plan - or make a gift of a fully paid insurance policy at any time. This is a simple way to leave a legacy with no up front costs.