

BENEFITS

BENEFITS FOR THE DONOR

Giving to the Forever Fund allows donors to extend their impact into the future by perpetuating their annual support. A well planned gift can also benefit the donor by:

- Reducing taxes
- Increasing income
- Conserving family assets
- Fulfill charitable goals
- Extend your impact

Philanthropic giving is a lifelong commitment that provides both personal and financial benefits.

Through the Forever Fund you can create a plan that benefits you and your family today, while ensuring that vital programs in the areas of health, education and financial stability are available for all community members in the generations to come.

BENEFITS TO OUR COMMUNITY

Giving to the Forever Fund benefits the community by providing a stable source of revenue to our organization, beyond what we raise during our annual campaign. This allows us to continue to support local agencies and our community impact programs that make a difference in the areas of health, education and financial stability through providing funding.



WEST CENTRAL INITIATIVE

United Way of Douglas & Pope Counties Forever Fund is a component fund of West Central Initiative (WCI), a regional community foundation working with communities, individuals, businesses and organizations to help create a better tomorrow for west central Minnesota.

WCI administers the fund so that the United Way of Douglas & Pope Counties Forever Fund's Board of Directors can focus on:

- Monitoring the fund's assets and growth;
- Making recommendations on grant and loan activities of the fund;
- Keeping the community informed of the fund's activities and solicits grant requests;
- Seeking contributions to build the endowed assets of the fund for the benefit of long term community change through United Way of Douglas & Pope Counties.

WCI serves nine west central Minnesota counties including Douglas and Pope Counties. Started in 1986 by The McKnight Foundation, WCI invests resources in local communities for regional success, using the tools of community and economic development and by promoting philanthropy.

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the FOREVER FUND

Leave your mark on Douglas and Pope Counties through our Endowment Fund.

United Way of Douglas & Pope Counties





GETTING STARTED

Thank you for taking the first step to exploring how you can make a lasting difference in Douglas and Pope Counties through giving to our Forever Fund.

What is the Forever Fund?

The Forever Fund is an Endowment Fund for United Way of Douglas & Pope Counties. Endowment gifts are intended to be kept and invested to generate an additional revenue stream and in-turn create a sustainable income for UWDP. Our Endowment Fund is set up to grow and produce earnings that are used to help future generations in Douglas and Pope Counties. The Forever Fund is held and managed by West Central Initiative.

Gift Options:

Your donation can make a difference. Donations can come in the form of:

- Cash Bequests
- Memorials
- Publicly Traded Securities
- Real Estate Interest
- Life Insurance Products
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Retirement Plan Beneficiary Designations
- Life Insurance Beneficiary Designations
- Other gifts such as personal property

1. Make sure you have an up-to-date will (or living trust) that reflects your charitable objectives. Without these documents, you surrender control of your property and assets to the courts.

2. Make United Way of Douglas & Pope Counties a beneficiary of your life insurance, pension plan or IRA.

3. Think beyond cash—you can leave stocks, real estate, insurance policies and other property to charitable organizations.

4. Contact your financial advisor (a financial planner, lawyer or accountant) and ask for help in establishing a charitable gift.

SUPPORT OUR FOREVER FUND

Please take a moment to complete the survey below, then return to United Way of Douglas & Pope Counties.

1. Have you included or do you intend to include UWDP in your will or trust or name us as a beneficiary of your retirement plan or life insurance policy?

____ Yes

____ No, but I would like to learn more. *(Please fill out the requested contact information below and return.)*

2. Thank you for including us. If you haven't already informed us please describe your gift: *(Real estate, life insurance, retirement fund etc.)*

Estimated Value: _____

3. All donors are recognized as contributors to our Forever Fund regardless of the amount. We hope you will allow us to recognize your generosity through collateral and material surrounding our Endowment Fund. Please indicate how your name(s) should appear on any recognition material and annual donor roster:

I wish to remain anonymous

Contact Information

Name: _____

Phone: _____ Email: _____

Signature: _____

Date: _____