

Please Remember This

UWCC – Building up the community cornerstones of education, financial stability, and health and wellness. We’re engaged in powering big ideas and big action through donating, volunteering, and speaking out for those in need.

UWCC – Much more than a fundraising organization. We leverage our community with the resources, reputation, and relationships needed to bring people and organizations together around innovative solutions.

UWCC will be here well after you are gone.



Want To See How It Works Right Now?

Gifts to the United Way Foundation of Charlotte County not only support our local community, but also provide you with the opportunity to create a legacy that you build to your satisfaction. And to those who have faithfully supported UWCC throughout the years, we’re excited to provide the opportunity for you to continue your legacy through planned giving with United Way Foundation of Charlotte County.



Uniting Your Generosity Today with The Legacy You Choose for Tomorrow



**Please contact your financial advisor or The United Way of Charlotte County
Phone: 941-627-3539
Web: www.uwfoundationcc.org**

United Way Didn't Invent Fiscal Responsibility. We Perfected It.

You may know The United Way best as a fundraiser with whom regular payroll deducted donations are popular. You may also know your United Way of Charlotte County (UWCC) has served our community for over 50 years. But did you also know we put non-profit agencies who request funds from us through a rigorous evaluation process conducted by volunteers from the community? (Think of it as the *Good Housekeeping* seal of approval of the non-profit realm.)

Did you know the Charlotte County Board of Commissioners and the City of Punta Gorda rely on our recommendations as to how public funds should be used to support local non-profit agencies? And that we serve as the fiduciary and fiscal agent for these funds? That's because, year after year, our sole focus is fiscally responsible investing in Charlotte County.

A 17 Year Dream Comes True

Almost two decades ago a generous gift from the Dr. David Klein Family started an endowment to support the long term operation of UWCC. Thanks to this gift, the UWCC board decided to create a separate entity to manage and grow the endowment to fund UWCC in perpetuity via planned giving. It's an opportunity not offered by most local charities.

"When I was President of the United Way of Charlotte County, we dreamed that someday our overhead expenses would be covered by an internal foundation fund. We now embark toward the goal of being able to tell donors that 100% of their charitable donation helps the human condition of all our neighbors. I committed myself to this task 17 years ago, and my commitment remains as firm as ever." - David M. Klein, MD FACS

It Just Makes Fiscal Sense

Think about what this means. By creating such a dedicated endowment, two fiscal duties are accomplished. First of all, we ensure the ongoing viability of UWCC in perpetuity. AND we remove the need for UWCC to fundraise for itself, competing for donation dollars, in essence, with the very agencies it funds!

THE GOAL

A \$10 Million Endowment

An unrestricted donation to the United Way Foundation of Charlotte County supports ALL of the UWCC approved partner agencies by reducing UWCC's operating costs, resulting in increased financial support to said agencies.

Let's Do This Together!

We happily accept most any gift in any form that is convenient for you and your family. Here are a few notable exceptions: We cannot accept privately held securities with no public market, private partnership interests, private REITS, time-share interests, artwork, collectibles and collections, and other such donations without an exception from our board. Certain real property donations are acceptable as gifts, subject to board approval.

Alternatively, if you wish, the Foundation will accept and administer planned giving to benefit one or more specified UWCC partner agencies who are funded as of this current date, and who have been vetted through the UWCC formal community impact process for addressing our mission of eliminating poverty. Any exceptions would need approval of the Foundation board.

This is Win-Win Philanthropy

It's true that your gift will positively impact our neighbors and friends all throughout Charlotte County. But at the same time YOU are the hero of this enterprise, and we plan to treat you accordingly. We will design and install in a public area an appropriate memorial with name recognition at the following level of your choice:

Founder

- \$500,000 in gifts over 10 years
- 10 places available
- A pledge of \$50,000 a year for 10 years

Supporter

- \$250,000 in gifts over 10 years
- 20 places available
- A pledge of \$25,000 a year for 10 years or a one-time gift.

Benefactor

- \$100,000 in gifts over 10 years
- 30 places available
- A pledge of \$10,000 a year for 10 years or a one-time gift.

Donor

- \$10,000 in gifts over 10 years
- 50 places available
- A pledge of \$1000 a year for 10 years or a one-time gift.

Your Legacy Lives On 



Phone: 941-627-3539

Web: www.UnitedWayCCFL/Foundation.Org