

# Join the Legacy Society

When you make a bequest to Butler County United Way, you will become a member of the Legacy Society. Join other community leaders who have chosen to make a permanent investment in improving your community. As a Legacy Society member, you will receive:

- The satisfaction that you are making a lasting difference in the community.
- Yearly recognition in Butler County United Way materials.
- Personal assistance in tailoring an endowment fund that addresses your charitable interests.
- Invitations to special United Way events and celebrations.



## Butler County United Way Legacy Fund

In 1951, a generous individual by the name of Martin Schlosser, bequested 8% of his estate to Butler County United Way in the form of stock. At that time, the value of that stock was estimated to be approximately \$18,000. This began what is now referred to as the Butler County United Way Legacy Fund.

Butler County United Way took that gift and invested it, knowing that by doing so, that stock had the potential to grow into a sum much larger than its original value. Donations of this type are used to help ensure our community's health and growth now and into the future; in contrast, the annual monetary donations we receive are used to focus on the current needs of our community.

Since 1951, there have been a few other contributions of this type that we have placed in the Legacy Fund, none of the size of Mr. Schlosser's gift. With careful nurturing and prudent decision making, this fund has grown to be well over \$500,000 and ensures the health of our organization – and most importantly – our community for years to come.

It doesn't take a lot to make a HUGE difference!

**LIVE UNITED**   
Butler County United Way

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# Legacy Society



**Butler County United Way**

# Legacy Giving



## You only need to care...

Butler County United Way has responded to the changing needs of the community since 1920. By listening to the community, they know people care. They care about individuals and families achieving their human potential. They know by focusing on income stability, education, and health, that residents within our community have a better chance of success.

As you know, problems created over many years cannot be solved in a single year. That is why Butler County United Way is asking for your help to address the long-term needs in the communities we serve.

Charity is not limited to your lifetime. Seventy percent (70%) of American adults give to charities annually.

However, only 6% leave gifts to charity in their wills and estate plans.

***Make the decision today  
to leave a legacy.***

## You Can Help

Endowing your annual gift will provide a way for you and your family to help address the needs of your community – forever. Butler County United Way has established endowment funds targeted at meeting long-term community needs with Fairfield Community Foundation, Hamilton Community Foundation and West Chester Liberty Township Community Foundation.

## Many Ways to Give

Choosing a legacy gift opens up a range of options where you can select the amount, timing and structure of your gift.

### Bequests

You don't need a large estate to make a meaningful gift through your will. A bequest affords a way for virtually anyone to express specific philanthropic wishes. In fact, the bequest is the most frequently utilized method of legacy giving in America.

### Gifts of Appreciated Securities

This method of giving can yield substantially greater tax benefits because you can avoid the taxable gain.

### Gifts of Life Insurance

This type of gift might be larger than donating cash or an asset outright. You can donate a 'paid-up' policy that you already own or purchase a policy to donate.

### Gifts from Retirement Plans

You can designate Butler County United Way as the beneficiary of an IRA, 401k or annuity. It's your choice.

### Life Income Arrangements

This option enables you to make gifts during your lifetime while retaining and perhaps even increasing your income from those assets through the remainder of your life.



***There are many ways to meet your current and ongoing needs while achieving your philanthropic goals at the same time. Please contact us if you are interested in learning more about legacy gifts to Butler County United Way. We will help find a plan that is right for you!***

***If you have already included us in your will, please let us know... and THANK YOU!***