

United Way of Greater Nashua

Planned Giving Letter of Intent

(not a legal obligation and may be changed at donor's discretion)

I/we believe in improving lives by mobilizing the caring power of communities to advance the common good. I/we intend to make an impact for years to come by affirming that I/we have made or intend to make a lasting gift to United Way of Greater Nashua.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ E-mail: _____

Donor Signature(s): _____ Date: _____

Donor Signature(s): _____ Date: _____

☐ I/We have made or will make the following gift(s) to United Way of Greater Nashua:

- ___ Bequest in my/our Will ☐ or Living trust ☐
- ___ Life insurance designating United Way of Greater Nashua as Beneficiary or Owner
- ___ Qualified Pension Plan designating United Way of Greater Nashua as a beneficiary
- ___ Life Income Gift to benefit me/us or my/our family (i.e., Charitable Gift Annuity, Charitable Remainder Trust) during my/our lifetime, then United Way of Greater Nashua
- ___ Retained Life Estate with the ability to continue using the property for the remainder of my/our life, then benefitting United Way of Greater Nashua
- ___ An outright gift (please specify) Cash ☐ Stock ☐ Real Estate ☐
- ___ Other Personal Property: _____
- ___ Endowed or other annual gift to ensure its perpetuity for the future (typically 20 times annual gift or a minimum of \$200,000) _____
- ___ Other Gift of: _____

☐ **Recognition:**

- ☐ I/We authorize recognition of this gift in United Way of Greater Nashua's publications in the following name/s:

(Please print) _____

- ☐ I/We prefer to remain anonymous, while enjoying all other benefits of membership.

☐ **Donor Intent:**

- ☐ My/Our gift is unrestricted and should be used for charitable purposes as determined by United Way of Greater Nashua.

- ☐ My/Our gift is restricted to United Way of Greater Nashua Legacy Endowment Fund.

- ☐ I/We would like this gift to be restricted to:

_____ (purpose)

☐ **Optional:**

It is helpful to United Way of Greater Nashua to know of future expectancies and a general sense of the gifts that have been pledged through the **United Way of Greater Nashua Legacy Circle**. If you are able to share the amount you have pledged, please do so here. The terms of your gift will always remain confidential.

- ☐ Please have a representative from United Way Worldwide contact me to discuss my gift.

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Please return to:

United Way of Greater Nashua
Endowment and Gift Planning • 20 Broad Street • Nashua, NH 03064
Phone: (603) 864-0202
Tax ID 02-6015642

UNITED WAY OF GREATER NASHUA'S BEQUEST LANGUAGE

One way for you to support United Way of Greater Nashua's mission is to leave us a bequest. A bequest is a gift made to charity in your will or trust. One significant benefit of making a gift by bequest is that it allows you to continue to use the property you will leave to charity during your life. Another benefit is that by making a bequest you are able to leave a lasting legacy.

Types of Bequests

There are a number of ways you can make a bequest to United Way of Greater Nashua. You can leave what is called a specific bequest. A specific bequest involves making a gift of a specific asset such as real estate, a car, other property or a gift for a specific dollar amount. For example, you may wish to leave your home or \$10,000 to United Way of Greater Nashua. Another kind of specific bequest involves leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 10% of your estate to United Way of Greater Nashua.

Another kind of bequest is called a residual bequest. A residual bequest is a bequest that is made from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving of a percentage of the residue of the estate to charity. For example, you may wish to leave 30% of the residue of your estate to United Way of Greater Nashua.

Bequest Benefits

There are no limitations on bequest gifts. Bequests may be made for a general or specific purpose. All bequests are exempt from federal estate taxes. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes resulting in a larger inheritance for your heirs.

Bequest Language

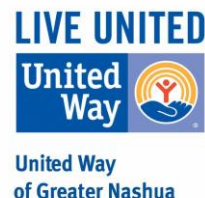
In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to United Way of Greater Nashua in your estate plan. We have provided some basic bequest language to assist you and your attorney.

1. Outright Bequest

If you are considering making an outright bequest to United Way of Greater Nashua, we recommend the following language:

Bequest of a Specific Dollar Amount

I hereby, give, devise and bequeath \$DOLLARS to United Way of Greater Nashua, a non-profit organization located at 20 Broad St., Nashua, NH 03064, Federal Tax ID #02-6015642, for United Way of Greater Nashua's general use and purpose.



Bequest of Specific Personal Property

I hereby, give, devise and bequeath DESCRIPTION OF PROPERTY to United Way of Greater Nashua, a non-profit organization located at 20 Broad St., Nashua, NH 03064, Federal Tax ID #02-6015642, for United Way of Greater Nashua's general use and purpose.

Bequest of Specific Real Estate

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to United Way of Greater Nashua, a non-profit United Way Worldwide located at 20 Broad St., Nashua, NH 03064, Federal Tax ID #02-6015642, for United Way of Greater Nashua's general use and purpose.

Bequest of Percentage of an Estate

I hereby, give, devise and bequeath PERCENTAGE OF YOUR ESTATE to United Way of Greater Nashua, a non-profit organization located at 20 Broad St., Nashua, NH 03064, Federal Tax ID #02-6015642, for United Way of Greater Nashua's general use and purpose.

2. Restricted Bequest

If you are considering a bequest but would like to ensure that your bequest will be used only for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to give that will ensure your charitable objectives can be met. We will also work with you and your attorney to craft language to accomplish your objectives.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give United Way of Greater Nashua flexibility should it no longer be possible for our United Way of Greater Nashua to use your gift as you originally intended:

If, in the judgment of the Board of Directors of United Way of Greater Nashua, it shall become impossible for United Way of Greater Nashua to use this bequest to accomplish the specific purposes of this bequest, United Way of Greater Nashua may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.