

MY/OUR PROMISE

I/We, _____, wish to be part of Calgary’s future with a planned gift to the Tomorrow Fund, helping to ensure that future generations will also benefit from programs and initiatives that build a great city for all.

PROMISE DETAILS

I/We will provide for United Way in my/our estate or deferred giving plans through:

- ☐ Bequest in a Will or Living Trust
- ☐ Charitable Remainder Trust
- ☐ Gift of Securities
- ☐ Annuities
- ☐ Real Estate
- ☐ Life Insurance (existing or new)
- ☐ Gift of Policy
- ☐ United Way as Beneficiary
- ☐ Other _____

The estimated value of this planned gift is _____ (Optional and Confidential)

PURPOSE AND INVESTMENT DIRECTION

We may follow up with you to ensure that the purpose and investment direction of your gift are fully understood.

- ☐ My/Our gift should be used immediately to benefit the community.
- ☐ My/Our gift should be invested in the Tomorrow Fund to support future needs of the community:

☐ As an endowed (permanent) gift

☐ As a non-endowed gift

☐ United Way Board of Directors should determine how my gift can best be used to support the work of United Way

☐ I/We would like to have my gift support: _____

CELEBRATING YOUR PROMISE

We would like to recognize the generosity of your promise gift and ask you to consider the following:

- ☐ I/We would like to be recognized as Tomorrow Fund Promise Donors, and have my/our names published in annual reports and other Tomorrow Fund communications, and I/we consent to such publication.
- Please list my/our Promise Donor recognition name as follows: _____
(ex. Bob Smith, Mr. and Mrs. Bob Smith, Ann and Bob Smith, the Smith Family, etc)
- ☐ I/We prefer to remain anonymous, but still wish to receive information and updates about the Tomorrow Fund (annual reports, event invitations).
- ☐ I/We prefer to remain anonymous and do not wish to receive future communications about planned gifts or the Tomorrow Fund.

CONTACT INFORMATION

1. Donor Signature _____

2. Donor Signature (if applicable) _____

Date of Birth (optional) _____

Date of Birth (optional) _____

Home Address _____ City/Province _____ Postal Code _____

Primary Phone (____) _____ - _____ Email _____

Name and contact information of your executor/lawyer/family member we may communicate with, when your gift is received, to ensure your intentions are carried out and to share details about the impact of your gift:

My preference for Tomorrow Fund communication is: ☐ Email ☐ Mail

THE TOMORROW FUND

The Tomorrow Fund is United Way of Calgary and Area's legacy fund. Gifts to the Tomorrow Fund help you build a powerful legacy that reflects your personal values and vision for the future. Planned effectively, a Tomorrow Fund gift can provide substantial financial benefits and tax savings while ensuring that the issues you care about will continue to be supported in the future.



Gifts to the Tomorrow Fund are invested for the long term, and the interest earned pays dividends in the form of community investments in local programs. A gift to the Tomorrow Fund really is the gift that keeps on giving.

INVESTMENT MANAGERS

Our investment managers (Mawer Investment Management) have achieved annualized returns of 8.7% over the last 10 years. The Investment Committee of the Board of Directors oversees the fund performance and the investment managers. Annual reports with investment performance updates are available to all Promise Donors.

FUND OPTIONS

Community Fund: Your gift will support United Way community investments that help individuals achieve financial stability, ensure kids are successful, and connect seniors to their community. Each year, up to 4% of the fund will be directed to priority projects.

Forever Fund: Your gift will be invested and protected, and you may choose an area of interest, such as kids, poverty, or community, or an issue, such as seniors or mental health, you'd like the funds to support permanently as part of United Way's community investments.

Memorial Fund: Make a tribute gift or create a named fund in honour of your loved one, to establish and continue their legacy in the community. If you wish, a memorial gift or fund may support a specific area of work, such as kids, poverty, or community, or issue as part of United Way's annual community investments.

Family Fund: You and your family advise United Way annually on the agencies, projects, and issues you'd like to support. Family Funds offer ultimate customization and flexibility to meet your family's philanthropic values and goals.

COMMUNITY FUND IMPACT (2018)

Annual distributions from the Community Fund support programs and initiatives that help individuals achieve financial stability, ensure kids are successful, and connect seniors to their communities. These targeted investments also align with United Way's three focus areas, ensuring maximum support for the community. In 2018, over \$1 million in investment income was distributed into the Calgary community.

Thank you for your promise to the community.

United Way works with donors to accommodate their goals and objectives to ensure the greatest impact. Any additional information you choose to provide is appreciated. You may include such documentation and/or information now, or our staff may contact you at your direction to discuss your promise gift.

NOTE – This form does not legally bind you to a gift commitment. It simply notifies United Way of Calgary and Area of your intention to make a planned gift. United Way encourages you to seek the advice of professional advisors before making planned giving decisions.

DONOR PRIVACY – United Way of Calgary and Area complies with the Association of Fundraising Professional's Donor Bill of Rights and is committed to protecting the privacy of your personal information. The information you provide is used to assist in the administration and acknowledgement of your gift, to issue tax receipts, and to fulfill your information questions. We do not release donor names unless requested by the donor. For more information, please visit calgaryunitedway.org.

United Way of Calgary and Area estimates fundraising and related operating costs to be 14% - 16%

Please return this form to:
United Way Planned Giving Officer
e: planned.giving@calgaryunitedway.org p: 403-231-6444
600 - 105 Ave SE
Calgary, AB T2G 1A1

