



We focus our efforts on three main areas that are essential for our community to thrive.



- 1 from poverty to possibility
- 2 strong communities
- 3 all that kids can be



the forever fund

The *Forever Fund* is the endowment fund of United Way Simcoe Muskoka. It provides an effective means of ensuring your investment today will fulfill your vision for the future. A donation to the *Forever Fund* provides the opportunity to:

- Continue an annual gift in perpetuity;
- Invest in future generations; and
- Provide a personal long-term legacy to the community.

By making a gift to United Way's *Forever Fund*, you can ensure your gift will continue to give year after year. All gifts are invested wisely, professionally managed, and indexed to inflation to ensure the real value of the capital is maintained. The annual income generated in excess of the amount capitalized for inflation is used by United Way to support innovative and effective community programs.

Need more information?

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Together, we are possibility.



Local giving. Local results.



UWSimcoeMuskoka.ca

Planned Giving: Shaping the Future

Our community was created by leaders with vision who dreamed of a better life. They knew they might not live to see all their dreams come to fruition, but had faith in the mission, efforts and resources of United Way Simcoe Muskoka. Today, you can create a better future for those living in this region tomorrow by giving a planned gift.

United Way Simcoe Muskoka improves lives and builds community by engaging individuals and mobilizing collective action. Your generosity helps our neighbours directly by providing community-based programs and services. It also strengthens our social systems so future generations can avoid today's challenges. With your help, local children, seniors and families will develop and access the resources needed to create possibility.

Our planned giving options make it easy for you to fulfill your philanthropic goals. A planned gift is a thoughtful commitment for the future. Planned gifts include installment donations based on future revenue, while others are made from assets accumulated with care over many years. Regardless, we're here to help.



PLANNED GIVING OPTIONS

Giving a planned gift is easy when our professionals work with your financial-planning team. You may be surprised at how simple it is to make a substantial gift with flexible giving options and tax benefits.

a bequest in your will

For most of us, a will is a legacy to those who have shared in and enriched our lives. It can also be an opportunity to give back to your community through your gift to United Way.

a gift of life insurance

Life-insurance policies are an excellent way to make a substantial gift. Many donors discover a major contribution can be made without compromising their family's financial security.

a gift of cash

You can also make a gift in your lifetime or a testamentary gift of the residual interest in property. By donating what will remain, you can continue using the property for life or for whatever you choose.

SPECIAL CONSIDERATIONS – Gifts that include non-cash assets must meet UWSM's acceptance criteria and may involve a number of personal and tax-planning issues. UWSM will be pleased to work with you and your advisor to maximize the benefit of any gift.

a gift of security

This kind of donation can be as varied as the imagination, and may include shares of securities and mutual funds, bonds, royalties or copyrights.

a commemorative or corporate gift

Commemorative or corporate gifts are a meaningful way for people to honour the memory of a loved one or to enhance the reputation of your company. Generally, these gifts are in memoriam, paying tribute to someone who has passed away, or to honour your employees.

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