



United Way of Rutherford  
& Cannon Counties

# LEGACY SOCIETY

CREATE YOUR LEGACY TODAY.  
BUILD FOR A BETTER TOMORROW.



3050 MEDICAL CENTER PARKWAY | FLOOR TWO | MURFREESBORO, TN 37129  
615-893-7303 | [YOURLOCALUW.ORG/LEGACY](http://YOURLOCALUW.ORG/LEGACY)

# LEGACY SOCIETY



As our local United Way embarks on our 65th anniversary, we are committed to making an impact on our community for generations to come through the Legacy Society. In recognition of your commitment to our community, the United Way of Rutherford and Cannon Counties invites you or your organization to become a member of our Legacy Society. The Legacy Society is composed of a special group of local community leaders and organizations dedicated to strengthening the future of Rutherford and Cannon counties.

A planned gift to the United Way of Rutherford and Cannon Counties is a commitment to the long-term success and well-being of our community. United Way's unique value lies in its ability to identify issues, develop partnerships, implement solutions, and measure results. Your leadership will allow United Way to do what we do best – meet today's needs while planning for tomorrow's future.

Legacy gifts are investments to the United Way of Rutherford and Cannon Counties' Endowment and support our community's future. These gifts are separate from United Way's annual campaign. Membership in United Way's Legacy Society involves a \$25,000 deferred gift, or an outright gift equal to or greater than \$10,000.

The inaugural Legacy Society campaign in 2015 yielded \$4.498 million. With United Way's upcoming 65th anniversary, United Way's Endowment Committee has established a goal of \$8 million total in pledges or realized gifts to the Endowment by December 31, 2021. We know with dedicated leaders like you, United Way can continue to make a positive impact and turn our community's challenges into opportunities. Your leadership opens the doors to a greater community for all.

## WAYS TO GIVE

There are multiple financial options in which you can make a planned gift to United Way. For additional resources and information, visit [yourlocaluw.org/legacy](http://yourlocaluw.org/legacy). As always, when considering any type of charitable gift, donors should consult with their tax advisor.

1. Current Will or Trust
2. Outright Gift of Cash or Check
3. Life Insurance
4. Appreciated Stock
5. IRA Rollover
6. Retirement Plan

## LEGACY SOCIETY MEMBERSHIP BENEFITS

- Recognition in United Way of Rutherford and Cannon Counties' Annual Report.
- Name listing in local directories and publications.
- Invitations to exclusive Legacy Society events.
- Name recognition on United Way's Legacy Society Donor Wall.

### LEGACY SOCIETY MEMBERS

**YOUR NAME HERE**  
Don and Melanie Alexander  
Dr. Jill Austin  
Billy and Rachel Bruce  
Ernest and Peggy Burgess  
Dr. James E. & Mrs. Beverly R. Calder  
Dr. and Mrs. Frank Carter  
Don and Melanie Clayton  
Meagan Flippin  
Drs. Russ and Sherry Galloway  
Marjorie Galloway  
Matthew and Retta Gardner  
Brian and Pat Hercules  
Bill and Kathy Jones  
Joanne O'Connell  
Greyson and Amy Painter  
Wanita Quakenbush  
Casey and Marcie Rainey  
Dr. Liz Rhea  
Chase and Francela Salas  
Matthew and Julie Stump  
Larry and Martha Tolbert  
Carolyn Tumbleson  
Dr. David J. and Mrs. Gina W. Urban  
Don and Hanna Witherspoon  
Andy and Cherry Womack

\*Legacy Society Members at the time of print.



# LEGACY SOCIETY

When you include United Way of Rutherford and Cannon Counties in your will or estate planning, you are contributing to the long-term success and well-being of our community.

You do not need to be a millionaire to give a gift with impact – donors from all walks of life at all income levels can make an investment in securing the future of our community. The process is simple, and the impact will last for generations.

In addition to making a difference in the lives of others, the best gift plans improve your financial and tax situation - often right away. A well-planned gift can reduce or eliminate long-term capital gains taxes, provide current income tax deductions, and reduce estate and gift taxes.

To design a gift, we recommend that you obtain the professional counsel of an attorney who specializes in estate planning. We can work with your advisors to help you plan for tomorrow and receive maximum benefits today.

We welcome the opportunity to send you additional information or meet with you to take the next steps. **Please contact Casey Warren at 615-893-7303 or [Casey.Warren@yourlocaluw.org](mailto:Casey.Warren@yourlocaluw.org).**



United Way of Rutherford  
& Cannon Counties

Here are six of the most popular ways to do this. We would welcome the opportunity to send you additional information or meet with you to take the next steps.

## 1. Current Will or Trust

Your legacy is reflected in your will. A bequest from a will or a living trust lets you pass any amount to the United Way of Rutherford and Cannon Counties free of estate tax. You can give cash, specific property or a percentage of your estate. This arrangement provides you with flexibility to make updates should your circumstances change. We recommend you obtain the professional counsel of an attorney who specializes in estate planning to ensure your will accomplishes your personal and charitable goals.

## 2. Life Insurance

Many contributors are attracted to life insurance because it enables them to make a larger gift than they would otherwise be able to make. You can make the United Way of Rutherford and Cannon Counties the owner of the policy and receive an income tax deduction. If you name United Way as the owner and the beneficiary, you will also receive tax deductions on the annual premiums. You can also retain ownership and name United Way as the beneficiary. If you retain ownership, the gift is revocable so you will not be eligible for current tax benefits, but your estate will not pay estate taxes on the policy proceeds United Way receives.

## 3. Outright Gift of Cash or Check

A gift by cash or check is the most common and easiest method for making a charitable contribution. If you itemize tax deductions on your tax return, the full value of your gift can be a tax deduction.

## 4. Appreciated Stock

Irrevocably contributing an asset provides an immediate income tax deduction. Additionally, donating appreciated stock held more than a year, has the benefit of eliminating tax on the gain.

## 5. IRA Rollover

The IRA rollover allows donors 70½ or older to donate up to \$100,000 from their IRA directly to a qualified charity without having to pay income taxes. The IRS requires owners of IRAs to begin annual withdrawals from these accounts after they turn 72 years old. An IRA rollover gift can meet an IRA's annual required minimum distribution and reduce taxable income.

## 6. Retirement Plan

Perpetuating your gift through a retirement plan is simple, flexible and tax wise. Assets remaining in retirement plans funded with pretax dollars can be subject to both estate and income taxes. This means that the amount left to heirs is diminished by estate taxes and the recipient is also required to pay income taxes. Naming the United Way of Rutherford and Cannon Counties as the beneficiary of a retirement account allows you to continue to draw money out of the account while you are living. This method also provides you with the freedom to change your mind if your situation changes. You can contact the administrator of your retirement plan to designate United Way as the beneficiary of your retirement plan.

# LEGACY SOCIETY PLEDGE FORM



United Way of Rutherford  
& Cannon Counties

Name(s): \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I/We are pledging the following gift(s) to the United Way of Rutherford and Cannon Counties' Legacy Society. The estimated total value is \$\_\_\_\_\_.

Bequest in my will or living trust

Life insurance designating the the United Way of Rutherford and Cannon Counties as Beneficiary or Owner

An outright gift (please specify) Cash Stock Real Estate Other Personal Property: \_\_\_\_\_  
\_\_\_\_\_

Qualified retirement plan designating the United Way of Rutherford and Cannon Counties as Beneficiary

Other (please specify): \_\_\_\_\_  
\_\_\_\_\_

## Recognition

Please recognize this gift in publications of the United Way of Rutherford and Cannon Counties as:

\_\_\_\_\_  
Example- John and Jane Smith

I/ we wish to be anonymous.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



PLEASE RETURN TO CASEY.WARREN@YOURLOCALUW.ORG.  
3050 MEDICAL CENTER PARKWAY | FLOOR TWO | MURFREESBORO, TN 37129  
615-893-7303 | YOURLOCALUW.ORG/LEGACY

# LEGACY SOCIETY PLEDGE FORM



United Way of Rutherford  
& Cannon Counties

Name(s): \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I/We are pledging the following gift(s) to the United Way of Rutherford and Cannon Counties' Legacy Society. The estimated total value is \$\_\_\_\_\_.

Bequest in my will or living trust

Life insurance designating the the United Way of Rutherford and Cannon Counties as Beneficiary or Owner

An outright gift (please specify) Cash Stock Real Estate Other Personal Property: \_\_\_\_\_

\_\_\_\_\_

Qualified retirement plan designating the United Way of Rutherford and Cannon Counties as Beneficiary

Other (please specify): \_\_\_\_\_

\_\_\_\_\_

## Recognition

Please recognize this gift in publications of the United Way of Rutherford and Cannon Counties as:

\_\_\_\_\_

Example- John and Jane Smith

I/ we wish to be anonymous.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

PLEASE RETURN TO [LUCIE.BURCHFIELD@YOURLOCALUW.ORG](mailto:LUCIE.BURCHFIELD@YOURLOCALUW.ORG).  
3050 MEDICAL CENTER PARKWAY | FLOOR TWO | MURFREESBORO, TN 37129  
615-893-7303 | [YOURLOCALUW.ORG/LEGACY](http://YOURLOCALUW.ORG/LEGACY)