



YOUR LEGACY GIFT TO THE COMMUNITY

Leave a gift in your Will. Help
support Victoria in the future.



United Way
Greater Victoria

“What you give is yours forever.”
– Dr. Wil Rose



WHY YOUR WILL IS SO IMPORTANT

Creating your Will is one of the most important things you can do in your lifetime. It is a lasting testament to you, your values and your accomplishments. It provides an opportunity to focus on who and what is most important in your life. In it, you clearly state your final wishes and show how you care for your loved ones and your community. Having a valid, up-to-date Will in place ensures your last wishes will be respected and followed.

BENEFITS OF A UNITED APPROACH

When preparing your Will, you consider how you would like to be remembered and who to include as your beneficiaries. You can make your community a better place by including a bequest naming United Way Greater Victoria as beneficiary in your Will. This gift does not affect your current financial situation, but can have significant positive impact on those in need in our community in the future.

Donors have trusted United Way to help the most vulnerable in our community for over 80 years. Your bequest can help shape the future of Victoria by culminating a lifetime of giving with a one-time transformational gift. By making a legacy gift to the United Way, you can build upon the impact your giving has already made, and continue to improve the lives of individuals and families in the future.

When your bequest is eventually realized by United Way you can trust we will be here. Your gift will be used in the community where it is needed most, based on expert advice.

Planned effectively, these gifts can provide substantial financial benefits and tax savings, while ensuring that the issues you care about will continue to be supported in the future.

BENEFITS OF GIVING

- Leave a Legacy that aligns with your values and help shape the future of Greater Victoria
- Gifts are invested in high-performing evaluated programs
- Maximize your tax & estate planning benefits

Your bequest can help accelerate change to improve the lives of our neighbours who need it most, making our local community stronger.

United Way's Areas of Action - Our three Areas of Action will guide United Way's path forward in the foreseeable term. Our community impact approach is geared to achieving lasting measurable improvements in the well-being of individuals, family and community.



ISOLATED SENIORS

Connect isolated seniors to healthy meals and companionship.

FAMILIES IN NEED

Create a safe daycare space for a child dealing with trauma.



MENTAL HEALTH & ADDICTIONS

Help save lives by providing outreach and counselling to those facing mental health challenges. and addictions.



BEQUESTS TO THE UNITED WAY

There are various ways in which bequests can be made to the United Way:

Percentage Charitable Bequest

You give a percentage of your estate to United Way.

"I give and bequeath to United Way of Greater Victoria, Charitable BN 119278224RR0001 _____% (or portion) of the residue of my estate."

Specific Charitable Bequest

You give a specific asset or collection of assets such as cash, securities, or other designated property to United Way.

"I give and bequeath to United Way of Greater Victoria, Charitable BN 119278224RR0001 \$_____, or (a specific asset)."

Residuary Charitable Bequest

You give all or a percentage of what remains in your estate after all specific bequests have been satisfied and debts and expenses have been paid.

"I give and bequeath all my remaining assets of any kind to United Way of Greater Victoria, Charitable BN 119278224RR000."

OR

"I give and bequeath _____% of my residual estate to United Way of Greater Victoria, Charitable BN 119278224RR000."

Contingent Bequest

You give all or a portion of your estate to United Way when a named individual beneficiary dies before you do.

"In the event that (name of person) predeceases me, I give their share of my estate to United Way of Greater Victoria Charitable BN 119278224RR000."

Specific Purpose

You have identified a specific charitable area of interest that you wish your gift to be directed to.

"I give, devise and bequeath (%), or (\$), or (a specific asset) to United Way Greater Victoria Charitable BN 119278224RR000 and used to [example: "support isolated seniors in Victoria"]."



JOIN OUR LEGACY CIRCLE



A group of donors who have made a commitment to leave a visionary investment to United Way.

If you have named United Way in your Will, please consider letting us know so we can thank you, and recognize your forethought and generosity to the degree you wish. We consider those with future gifts (such as bequests), as members of our Legacy Circle. As a Legacy Circle member, you can choose from a range of recognition opportunities (including anonymity if you prefer).

REVIEWING AND REVISING YOUR WILL

To ensure your Will is current and valid, estate planners recommend you have it professionally reviewed at least every three to five years or when there is a relevant change in your family or financial situation.

ADDITIONAL INFORMATION OR PRIVATE CONSULTATION

For more information and/or a confidential consultation on bequests and other types of legacy gifts please contact:

Darryl Els
Donor Relations Officer – Individual & Planned Giving
darryl.els@uwgv.ca or call 250.220.7365

THANK YOU

United Way Greater Victoria, 201-633 Courtney Street Victoria, BC V8W 1B9
Charitable Business Number #119278224RR0001