

The Legacy Society

The Legacy Society is designed for caring individuals and families who wish to support Trident United Way's mission and who wish to leave an impacting gift to their community. With a planned gift through the Endowment Fund, you can sustain your caring beyond your lifetime and make a larger gift than you thought was possible. Your support will be invested to make a real difference in people's lives.

Trident United Way will work with you and your attorney to ensure that your gift maximizes its potential not just for the community, but also for you and your family.



There are many ways to leave a legacy:

- Outright gifts -- These include gifts of appreciated securities and real estate.
- Bequests -- Naming Trident United Way may be in the form of a dollar amount, property, a percentage or the residual of an estate.
- Charitable Remainder Trusts -- The earnings on trust assets are paid as income to you until your last beneficiary dies. Then the principal goes to Trident United Way.
- Charitable Lead Trusts -- Trust earnings go to Trident United Way during the life of the trust and then principal goes to your beneficiaries.
- Life Insurance -- Name Trident United Way as a beneficiary or donate a paid-up policy to United Way.
- Retirement Plans -- Name Trident United Way as a beneficiary of your retirement plans.

For more information about leaving a legacy, contact Kenton Barham, Vice President of Major Gifts and Planned Giving, at Trident United Way at 740-9000 ext. 240 or kbarham@tuw.org.