



MY/OUR LEGACY

I/We, _____ wish to be part of our region’s future with a Legacy gift to United Way Southern Vancouver Island to help improve the lives of our neighbours who need it most and make Greater Victoria a better place to live.

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 legacy 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 in the near term to benefit the community.
- My/Our gift should be invested in United Way’s Endowment Fund to support future needs of the community in perpetuity.
- I/We would like to have my gift support: _____

CELEBRATING YOUR PROMISE

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

- I/We would like to be recognized as Legacy Circle Donors, and have my/our names published on the UWSVI online Donor Wall and other Legacy Circle communications, and I/we consent to such publication.

Please list my/our 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 Legacy Circle (impact reports, event invitations).
- I/We prefer to remain anonymous and do not wish to receive future communications about

CONTACT INFORMATION

1. Donor signature _____ Date of birth (optional) _____

2. Donor signature(if applicable) _____ 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 Legacy Circle communication is: Email Mail

If you have any questions please contact Hazel Braithwaite at 250.220.8947 or hazel.braithwaite@uwsvi.ca