PROMISE DONOR FORM

United Way Calgary and Area
410–919 11 Ave SW,
Calgary, AB, T2R 1P3

MY/OUR PROMISE

I/We, _____ have chosen to leave a planned gift to United Way of Calgary and Area. This gift reflects a commitment to creating lasting change and helps ensure a philanthropic legacy that will continue strengthening our community for years to come.

PROMISE DETAILS

I/We will provide for United Way in my/our estate or deferred giving plans through:

- ☐ Bequest in a Will
- ☐ Life Insurance (existing or new)
- ☐ RSP/RRIF/TFSA
- ☐ United Way as Owner
- ☐ United Way as Beneficiary
- ☐ Other_____

The estimated value of this planned gift is: _____ *(Optional and Confidential)*

PURPOSE AND INVESTMENT DIRECTION

Your promise gift supports United Way's Tomorrow Fund, a legacy fund designed to create long-term community impact. Gifts to the Tomorrow Fund provide sustainable resources that help build a resilient, caring community – now and for future generations.

- ☐ As an endowed (permanent) gift
- ☐ As a non-endowed gift
- ☐ Other: I/We would like to have my gift support: _____

CELEBRATING YOUR PROMISE

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

- ☐ I/We would like to be recognized as a Tomorrow Fund Promise Donors and have my/our names published in annual reports and other Tomorrow Fund communications, and I/we consent to such publication.

Please list my/our Promise 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 Tomorrow Fund (annual reports, event invitations).
- ☐ I/We prefer to remain anonymous and do not wish to receive future communications about planned gifts or the Tomorrow Fund.

CONTACT INFORMATION

1. Donor Signature _____ 2. Donor Signature (if applicable)_____

Date of Birth (optional) _____ 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 Tomorrow Fund communication is: ☐ Email ☐ Mail

Please return completed form to: United Way Planned Giving Officer | E: planned.giving@calgaryunitedway.org

THANK YOU

Our Privacy Promise: Your support is very important to us. We value your privacy, and we will not sell or trade your name with other organizations. Charitable #13022 9750 RR0001. This year, United Way of Calgary and Area aims to match last year's fundraising success, with a goal of surpassing $50 million to support our community. It will cost approximately 14% to 16% of the total to raise this, well below the Canada Revenue Agency's acceptable level of 35%. The funds from this campaign will support the greatest needs or will be used as directed by the donor. For further information, please contact United Way at (403) 231-6265. Our address is 410 – 919 11 Avenue SW Calgary, AB T2R 1P3 and we are incorporated in Alberta.