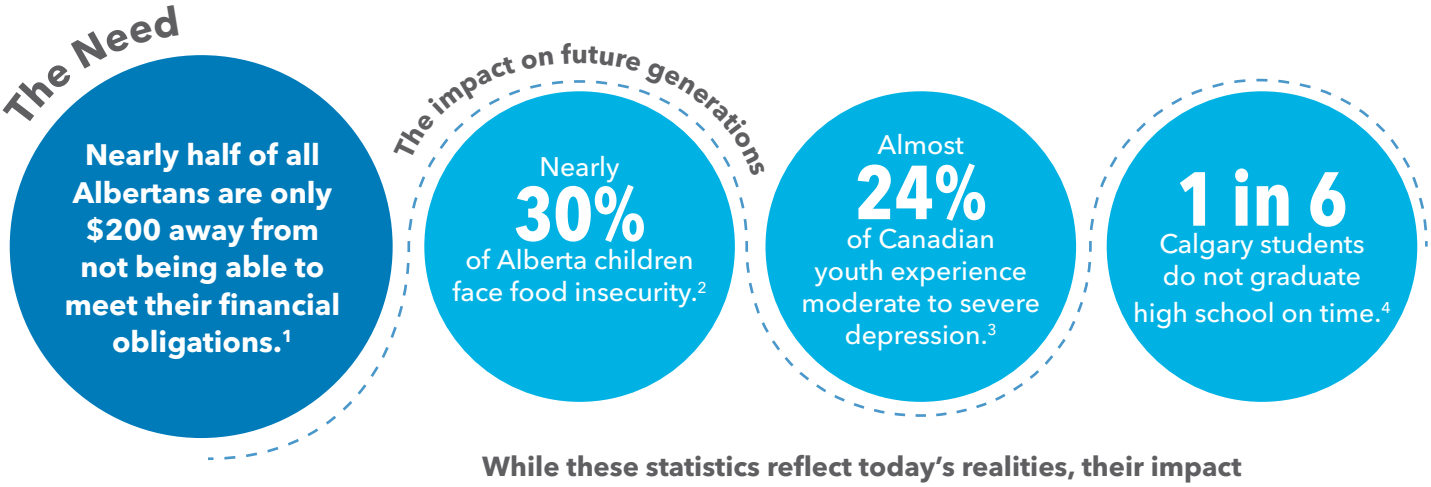

Your Legacy,
Your Way.
United Way
Calgary and Area

A Legacy of Impact That Lives On

Real progress is happening today because of your support. Right now, families are finding stability, people are accessing support, and pathways to opportunity are opening.

But some challenges run deeper than any single generation. Poverty, addiction and mental health struggles persist across generations. Rising costs and shrinking resources only deepen the challenge.



While these statistics reflect today's realities, their impact will be felt for generations to come and new challenges will continue to emerge in the years ahead.

Calgary is one of the fastest-growing cities in Canada, doubling its population in the last 25 years and projected to reach over two million residents by 2030[5]. As our city grows, so do the challenges.

That is where your legacy changes things.

A legacy gift ensures that United Way of Calgary and Area is there for whatever comes next, responding, adapting and supporting every generation that needs it.



How United Way Partners with You on Your Planned Gift

Since 1940, United Way has worked with Calgarians to address the issues shaping our city. We have adapted to emerging needs while maintaining a clear commitment to long-term community impact. Our local expertise, strong partnerships and sustained leadership provide the foundation needed to support your legacy gift with care and purpose.

Ensuring Your Generosity Continues for Generations to Come

A legacy gift continues supporting the causes you cherish most, long into the future. Every gift creates a meaningful difference in our community. United Way is your trusted partner to ensure that your contributions find those who need it most.







Your Legacy, Your Way

Including United Way in your estate plans is a deeply personal decision that reflects your values, priorities and hopes for the future.

We encourage you to work closely with your professional advisor or lawyer to ensure your plans are thoughtfully structured.

United Way's role is to support you along the way. We can share information about our community impact, provide charitable giving resources, and collaborate with your advisors to help ensure your intentions are clearly reflected.

Our goal is to make the process as straightforward and seamless as possible, so you can move forward with confidence.

United Way also offers a suite of optional resources to support you at your own pace, including:

1

United Way's Will Planning Guide

An introductory resource that outlines common charitable giving considerations.

2

Family Philanthropy Handbook

A guide designed to facilitate discussion and help families make philanthropic choices.

3

Tax Talk Seminars

Complimentary, expert-led educational sessions on financial, tax and estate planning topics.

Ways to Leave a Legacy

A legacy gift can help you maximize your impact and extend your philanthropy, while taking advantage of valuable tax and estate planning benefits.

Bequest: A gift in your will lets you support the community beyond your lifetime while keeping full control of your assets today. You can choose to leave a specific dollar amount, a percentage of your estate or the residual (what remains after other gifts are made).

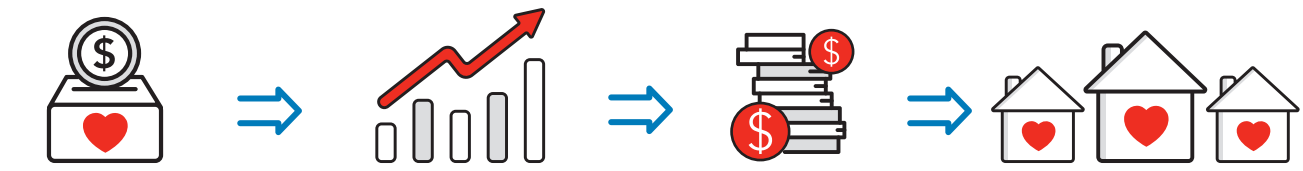
Life Insurance: Life insurance is a meaningful way to make a future gift. You can name United Way as the owner and beneficiary of a policy, or as a beneficiary of a new or existing policy.

RRSPs and RRIFs: Naming United Way as the beneficiary of your RRSP or RRIF can help reduce estate taxes while supporting the causes that matter most to you.



Your Gift, Managed with Care for Lasting Impact

Legacy gifts to United Way are invested in **United Way's Tomorrow Fund** and are professionally managed by **Mawer Investment Management** to ensure your generosity creates enduring benefits for our community.



The Tomorrow Fund is a legacy fund that has a strong history of competitive investment returns. United Way is committed to the long-term preservation and growth of the fund, ensuring every dollar entrusted to it delivers the greatest possible impact for our community.

> **Legacy giving isn't just about the future; it's also about honouring the past and living our values today. It's a guaranteed gift to the community, and to us, it represents hope for our children and for generations to come.**
>
> –Alec Clark and Sloan Pipella-Clark, long-term United Way supporters

Support felt for generations

When you choose to invest in United Way, your support is measured in lives strengthened, futures changed and a community that thrives for generations to come.

Your Legacy Gift ensures that our future generations will be connected to the supports when and where they need them most.

Together, we have been investing in our community for over 85 years. By leaving your legacy with United Way, we are ensuring that Calgarians 85 years from now are receiving the support they need not just to survive but thrive.

Ready to continue your legacy?

Let's build your legacy together

Email: planned.giving@calgaryunitedway.org

Phone: (403) 231-6444

Or scan here to learn more:

Connect with us:

@UnitedWayCGY

calgaryunitedway.org/planned-giving

2026 United Way of Calgary and Area

BN/Registration Number: 13022 9750 RR0001

United, we can create a lasting legacy.

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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 or planned.giving@calgaryunitedway.org.

United Way
Calgary and Area

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