

## WAYS TO GIVE PLANNED GIVING



### WHAT IS PLANNED GIVING?

**Your Passion. Your Plan. Your Legacy.**

Planned giving is your opportunity to shape the future of Halton and Hamilton, on your terms. With thoughtful planning, your gift can offer meaningful tax advantages and financial benefits, all while supporting the causes that matter most to you, long into the future.

By choosing to make a planned gift, you are extending your tradition of generosity and showing a deep commitment to your local community. It's more than a donation, it's a powerful investment in lasting change. You're helping to tackle today's challenges while ensuring your values continue to make a difference for generations to come.

A planned gift to United Way Halton & Hamilton leaves a legacy of compassion, leadership, and community care. It's your way of ensuring the future reflects what you care about most.

### LEAVE A LEGACY OF LOCAL IMPACT

After providing for your loved ones, consider including United Way Halton & Hamilton in your will. It's a meaningful way to extend your values beyond your lifetime and support the causes closest to your heart.

When you leave a gift in your will, you're investing in local programs that create measurable and lasting change, right

here at home. Your legacy will help build a stronger, more caring community for future generations.

United in ACTION, we are driving solutions, changing lives, and creating a future where everyone has the opportunity to thrive.

#### DID YOU KNOW?



Poverty exists in every Halton neighbourhood, affecting **upwards of 2,400** people in some areas.



Hamilton has **above-average** ER visits for self-harm, with the highest rates among girls aged 10–19.



**1 in 4** Canadian seniors face barriers to community involvement, making them far more likely to feel lonely.

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### GIFTS FOR TOMORROW

#### Bequests

Designate a specific gift or a portion of your estate to the United Way Endowment Fund, and your estate will receive an official tax receipt.

#### Life Insurance

Life insurance provides an affordable option to make an extraordinary gift to your community. You can transfer ownership of a new or existing policy, or make United Way a full or partial beneficiary of a policy you continue to own.

#### Retirement Plans

You can designate United Way as a beneficiary of your RRSPs or RRIFFs, or even a TFSA. Your gift qualifies for an official tax receipt and can offset tax payable on other assets of your estate.

### MAKING A GIFT TODAY

Leaving a gift today ensures that the issues important to you receive long-term support.

#### Cash Gifts

By making a gift of cash, you can witness the impact of your generosity immediately while enjoying tax benefits.

#### Gift Of Securities

Giving appreciated securities is one of the most cost and tax-effective ways to make a major impact on the issues you care about.

**“** As a family, we believe in the power of giving back together. Supporting United Way allows us to make a meaningful impact, teach our children about the importance of philanthropy and helps strengthen our community”.

**Mark Chabot,**  
Senior Wealth Advisor, Chabot Wealth  
Management  
RBC Wealth Management  
RBC Dominion Securities Inc.

### CONTACT US



For further information on leaving a planned gift or making a gift of stocks and securities to United Way Halton & Hamilton, please visit [uwhh.ca/give/planned-giving](https://uwhh.ca/give/planned-giving) or contact us directly to discuss your planned gift.

For more information about creating a meaningful legacy, contact [plannedgiving@uwhh.ca](mailto:plannedgiving@uwhh.ca).