

Maximized Impact:

A retired and widowed school teacher donates about \$10,000 a year to many different charities and individuals (including non-taxable gifts). Her accountant and lawyer recommended she ask the United Way to build an investment plan that would work for her. After meeting, United Way recommended four opportunities. She had not heard of the two projects she ultimately chose to support for a total of \$40,000. She donated securities with significant capital gains to maximize her tax benefit.

“It was easy and I felt good knowing 18 of the 20 women and their children had successfully started a new life without violence!”



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United Way

Saint John, Kings
& Charlotte

**Your Social
Investment
Advisor**

Recognition

Everyone likes to be recognized differently for their gifts. The United Way will design an custom recognition plan with you.





Charitable gifts can achieve a lot or a little. You want your giving to be as impactful as possible, but how do you know where best to invest your charitable gifts?

United Way Can Help

United Way has developed an investment portfolio to address social issues based on the needs of the community. We work with other funders, governments, and partners to identify the most pressing social problems and set targets for the changes we want to see. Local charities submit detailed grant applications to the United Way, which are reviewed and analyzed by our volunteer experts. Each year the strongest performing organizations and initiatives make up our investment portfolio.

The United Way investment Advisory Services matches individuals and foundations to projects in our portfolio.

3 Simple Steps

STEP 1: MEET WITH UNITED WAY ADVISOR

United Way's Executive Director meets with you to understand your motivations and charitable interests. Then recommends social investment options from a portfolio of high potential opportunities.



STEP 2: DEVELOP IMPACT PLAN

You select the project(s) that best fits your interests. You can sponsor an entire project or invest in parts of multiple projects. Single-year and multi-year options are available.



STEP 3: MONITOR, WATCH THE RESULTS!

The United Way manages your investment, sets target outcomes with the funded charity, and ensures your gift is optimized. To maintain accountability, the gift is made to the United Way and disbursed to the funded partner. Twice a year, the United Way will provide you with program updates and progress on targeted outcomes.



Why United Way?

- We see charitable giving as an investment in the community.
- We set targets and monitor our investments to maximize performance.
- We leverage funding from other sources to optimize impact.
- We protect investments by helping to strengthen charities.
- We develop a custom plan that is right for you.

1-2-3 Impact!



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