

# UNITED WAY TOCQUEVILLE SOCIETY

Tocqueville Society members are philanthropic leaders who, through generous gifts of treasure, demonstrate their commitment to tackling our community's most pressing problems and creating sustainable positive change. The Society is named after the 19th century French political thinker and historian Alexis de Tocqueville who, in his writings, recognized the importance of voluntary action on behalf of the common good. The Society is dedicated to developing a stronger sense of community and connection among local philanthropists through engagement opportunities that grow awareness of issues and solutions affecting the well-being of children and families in our community and networking with like-minded individuals.

Members of our local Tocqueville Society automatically become members of United Way Worldwide's Tocqueville United, a society comprised of philanthropic leaders from throughout the United Way global network.

For more information about United Way of Central and Northeastern Connecticut's Tocqueville Society, please contact Kim Reeves at [kreeves@unitedwayinc.org](mailto:kreeves@unitedwayinc.org) or (860) 493-6882.

## REAL IMPACT. REAL ACTION. REAL RESULTS. LIVE UNITED.



United Way of Central and  
Northeastern Connecticut

# MEMBERSHIP CRITERIA:

Tocqueville Society membership is open to individuals or couples who donate annual gifts totaling \$10,000 or more of which a minimum of \$1,000 is allocated to United Way to support our organization's work.

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## MEMBERSHIP RECOGNITION AND BENEFITS:

- ✦ Access to, and networking with, influential business, community and philanthropic leaders
- ✦ Invitations to exclusive events throughout the year
- ✦ Opportunities to engage on a global level with Tocqueville United members
- ✦ Opportunity to witness and experience United Way's work first-hand
- ✦ Priority access to United Way of Central and Northeastern Connecticut events
- ✦ Receipt of quarterly Tocqueville Society e-newsletter
- ✦ Premier listing in United Way Annual Report







## WOMEN OF TOCQUEVILLE

Women of Tocqueville is a transformative group of committed business, civic and philanthropic women leaders dedicated to helping their neighbors in need and stabilizing families struggling to make ends meet. Members do this by participating in engagement opportunities to tackle challenges and create positive sustainable change for ALICE families. Through involvement, members are afforded the chance to build strong bonds with other like-minded philanthropists, deepen their knowledge of community issues, and support women and children by sharing their wisdom, service, and generosity.

Women of Tocqueville members are entitled to special recognition and benefits in addition to those offered to Tocqueville Society members.

**CLICK HERE** to learn more about Women of Tocqueville and criteria for membership.

*\*ALICE is a United Way-coined acronym that stands for Asset Limited, Income Constrained, Employed.*

## THE VALUE OF UNITED WAY

Our communities, region and world look different than anyone could have imagined a few years ago. It is no exaggeration to say that the most vulnerable - anyone who was barely getting by before - is struggling now more than ever.

United Way is stepping up to respond, as we have for nearly 100 years. We are ensuring that people's immediate needs are met while also finding solutions to long-term challenges.

Our mission is to engage and bring together people and resources committed to the well-being of children and families in our community.

Together, we can help children succeed academically and families achieve financial security. Together, we can make life better for those who need support the most right now and ensure equitable outcomes for all.

**That is what it means to LIVE UNITED.**



# MEMBERSHIP FULFILLMENT OPTIONS:



## CHECK

Please make your check payable to *United Way of Central and Northeastern Connecticut*.



## PLEDGE

Giving is easy when you elect to pledge. Choose the option that best meets your needs – payroll deduction, bill me later (one time, monthly or quarterly) or set up a recurring credit card payment.



## GIFTS OF STOCK, SECURITIES AND MUTUAL FUNDS

Giving stock, securities and mutual funds to United Way of Central and Northeastern Connecticut is a strategic way to invest in positive community change. By contributing long-term appreciated securities to United Way, you may avoid the capital gains tax that would otherwise be due if you sold the securities and retained the proceeds.



## PHILANTHROPY FUND

Philanthropy Fund is an exclusive program offered to members of United Way's Tocqueville Society to help you meet all your charitable giving needs. To open a Philanthropy Fund, you must contribute a minimum gift of \$10,000 of which at least \$5,000 benefits United Way. Throughout the calendar year, you can contact the United Way Philanthropy Fund administrator to direct your gift to nonprofit organizations of your choice. As a "thank you" for your generosity, no fees will be deducted from designations made through the Philanthropy Fund program.



## UNITED WAY PRIVATE LABEL DONOR ADVISED FUND

United Way of Central and Northeastern Connecticut's Private Label Donor Advised Fund offers Tocqueville Society members a low cost, flexible vehicle for charitable giving. Our comprehensive, streamlined system makes giving to United Way and the causes you care about fast and simple. When you establish a donor advised fund, you will receive an immediate tax benefit with the ability to distribute grants over time, even in a different tax year. An initial contribution of \$15,000 is required to open a donor advised fund with a minimum of 20% of the contribution being allocated to a designated fund to support the work of United Way of Central and Northeastern Connecticut.



## INDIVIDUAL RETIREMENT ACCOUNT REQUIRED MINIMUM DISTRIBUTION

You can support United Way of Central and Northeastern Connecticut's mission and receive tax benefits in return with this popular gift option commonly called the IRA charitable rollover. If you have an IRA, your first required minimum distribution must be taken by April 1 of the year after you turn 72. You can give from your IRA distribution directly to United Way without increasing your adjusted gross income. (Please consult your financial/tax advisor to determine your required minimum distribution and tax implications associated with your IRA charitable rollover gift.)



## DONOR ADVISED FUND

If you have a Donor Advised Fund with a third party, you can recommend that funds be granted to United Way of Central and Northeastern Connecticut to be invested in our mission-aligned work.