

# UNITED WAY PRIVATE LABEL DONOR ADVISED FUND

At United Way of Central and Northeastern Connecticut, we are co-creating a better future for the 860 region. The Onward860 approach aligns partners to end poverty; leverages our collective expertise to deepen impact; connects people with resources and opportunities to make a difference; and, transforms the future with game-changing solutions.

Together, in partnership with individuals, businesses, other nonprofits and the public sector, we can create an equitable community where everyone can succeed.



We offer a variety of giving options for you to partner in this work. Because we realize that you may already give to organizations focused on issues of interest to you, United Way offers a Private Label Donor Advised Fund, a way to give to both United Way AND the causes you care about.



## WHAT IS A DONOR ADVISED FUND?

Our United Way Private Label Donor Advised Fund offers you a low cost, flexible vehicle for charitable giving. When you invest in a United Way Private Label Donor Advised Fund you have the opportunity to:

- Achieve positive impact, based on your personal interests, values and philanthropic goals
- Participate in the most tax advantageous way to make charitable contributions, with the flexibility to recommend grants over time
- Invest funds in one of six investment pools, each providing a competitive return on investment, as well as a Money Market pool
- Establish charitable giving as your legacy by involving children or grandchildren in your grant making decisions
- Support the organizations you care about in perpetuity by assigning a successor advisor
- Establish a personal online account to review and manage your investments and charitable giving
- Contribute cash and/or marketable securities; with prior approval, other assets such as real estate, artwork, or private company stock may also be contributed



**ONWARD860** >>>

     
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## Investment Guidelines for a United Way Private Label Donor Advised Fund:

- A minimum initial investment of \$15,000 is required to open a Private Label Donor Advised Fund
- Incremental investments of \$5,000 or more may be made at any time to your Donor Advised Fund
- All contributions will be split between a discretionary and designated fund
  - 80% of contributions will be allocated to a discretionary fund. You may recommend grants from the fund to any IRS-qualified U.S. charity, including United Way
  - 20% of contributions will be allocated to a designated fund to support the work of United Way of Central and Northeastern Connecticut



## WHAT ASSETS CAN BE CONTRIBUTED TO A DONOR ADVISED FUND?

Cash	Bequests
Stocks	Life Insurance policies and annuities
Mutual Funds	
Real Estate	Equity interests in privately held businesses
IRAs	

To learn more or to open a United Way Private Label Donor Advised Fund, please contact Clayton Jason at [cjason@unitedwayinc.org](mailto:cjason@unitedwayinc.org).

