PLANNED GIVING

GIVING IS BELIEVING

United Way
Haliburton Kawartha Lakes

WHAT IS PLANNED GIVING?

Planned giving is any major gift made as part of a donor's overall financial and/or estate planning. These include gifts of equity, life insurance, real estate, personal property, or cash.

Continuing your tradition of giving with a planned gift is an extraordinary statement of your generosity and commitment to your local community. When you make a planned gift, you are acknowledging the issues that impact our community today while ensuring that those issues continue to be addressed tomorrow and into the future. A planned gift to United Way Haliburton Kawartha Lakes continues giving beyond your lifetime and ensures that your generosity benefits our community for generations to come. Leave a lasting legacy and make a cause you care about part of your life story.

INVEST IN THE FUTURE OF YOUR COMMUNITY

After you've remembered your loved ones, please consider including United Way Haliburton Kawartha Lakes in your will. Let United Way help you achieve your philanthropic goals - now and well into the future. By leaving a gift in your will, you can transform lives by supporting local programs that will have the greatest measurable impact in our communities. You will leave a powerful legacy of hope that reflects your values and vision for the future. An investment made in Kawartha Lakes stays in Kawartha Lakes. An investment made in Haliburton County stays in Haliburton County.

Food insecurity in Kawartha Lakes and Haliburton is higher than the provincial average.

Nearly 1 in 5 children in Canada live in poverty.

1 in 5 people in Canada will personally experience a mental health problem or illness.

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GIFTS FOR TOMORROW

BEQUESTS

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

LIFE INSURANCE

Life insurance is an affordable option that allows you to make an extraordinary gift to your community. You can transfer ownership of a new or existing policy, or you can 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 RRIFs, 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 for today ensures issues that are important to you have support over the long term.

CASH GIFTS

Make a gift of cash to see your generosity in action to receive immediate 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.

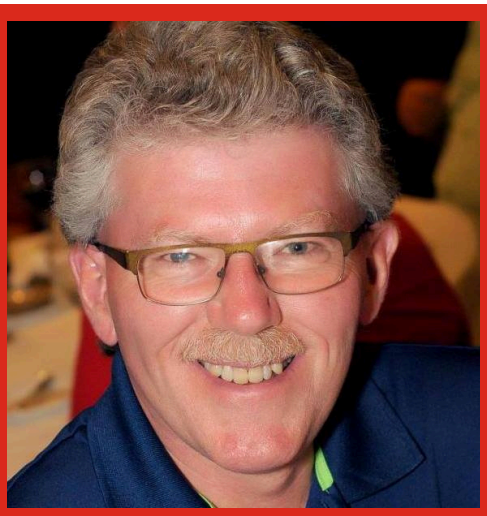
CREATE A MATCHING GRANT

Matching grants are a way to encourage first time donors or encourage repeat donors to increase their contribution by doubling the value of their donation.

CONTACT US FOR MORE INFORMATION

For further information on how you can leave a planned gift, or gift of stocks and securities to United Way Haliburton Kawartha Lakes, please visit www.ckl-unitedway.ca/planned-giving/ or contact us directly to discuss your planned gift.

For more information about creating a meaningful legacy, contact shantal@hkl.unitedway.ca



Several years ago, I purchased a life insurance policy that named the United Way as beneficiary. The process was straightforward, and the cost was affordable. I feel good knowing that my community will benefit in the future from my gift. I hope that others will consider the many ways that anyone can support the community through planned giving.

Mike Puffer
Former Executive Director, United Way for the City of Kawartha Lakes