Planned Giving

UNITED WAY
Ohio Valley

Planned giving is simple to arrange and can take many forms - a bequest in your will, a beneficiary designation on a retirement account or life insurance policy, or other estate-planning tools. Your gift to United Way ensures that your values continue to strengthen this community for generations.

Why Choose Planned Giving with United Way?

Tax Efficient! A gift made directly from your qualifying retirement account may lower your taxable income!

Simple to implement, highly effective, and ensures essential services remain available!

United Way delivers and strong return on investment.

UWOV invests through a coordinated, community-wide strategy and sustains proven programs that deliver measurable results.

UWOV maintains strong stewardship of donor dollars through financial review, agency visits, and performance evaluation.

Type of Distribution/Account Type

Qualified Charitable Distribution (QCD) from an IRA

Charitable distribution toward my Required Minimum Distribution (RMD)

Types:
Traditional IRA
Rollover IRA
Inherited IRA
SEP IRA (inactive)
SIMPLE IRA (inactive)

Note: 401(k), 403(b), and 457 accounts are not eligible for QCDs unless rolled into an iRA

Bequests in Your Will
or
Other Estate Planning Tools

If you would like help exploring options, please contact your broker, estate advisor, or our United way Team at pyevincy@uwov.org. Thank you for considering a legacy that reflects the values you cherish.

How Donor Dollars Are Invested

Apply
Local nonprofits apply for program funding.

Review
Community volunteers review applications and financials to ensure strong stewardship.

Decide
Volunteers make **funding recommendations** based on community needs and program impact.

Fund
Selected nonprofits **receive United Way support** to deliver services.

Report
Funded partners **share results** to demonstrate how **lives are being improved.**