



ALEXIS DE TOCQUEVILLE
UWSJC LEADERSHIP SOCIETY



LIVE UNITED



United Way of San Joaquin County

**HOW TO GIVE TO
YOUR COMMUNITY
AND OUR NONPROFITS**



NEXT-LEVEL SUPPORT MEANS WE MUST THINK AND ACT BOLDLY.

For nearly a century the United Way of San Joaquin County has strengthened the fabric of our communities through the generosity of individuals, corporations, and community partners.

Financial support, generated through workplace giving campaigns, sponsorships, and events, has enabled hundreds of local nonprofits to transform our community through a collaborative mission to improve lives.

We will celebrate our 100th anniversary in 2026 with both pride for what has been accomplished and steadfast determination for the possibilities that lie ahead. There is still significant work to be done, and we are energized and prepared to embrace our power to create more profound change.

We must remain committed to our role as a catalyst for area nonprofits and the critical services, compassionate work, and life-saving resources they provide every day.

PROFOUND GENEROSITY WILL LEAD TO PROFOUND CHANGE.

Your gift will help us create solutions by addressing the root causes of some of our communities' most formidable issues that lead to homelessness, poverty, and a lack of education. Outsized gifts enable us to create extraordinary community transformation.

BE A CHAMPION OF CHANGE.

Our greatest strength is our community. It's time to come together as leaders to support the people, programs and causes you care about most in our community. You have the power to improve lives, now and in the future, with a leadership gift that has defining impact. You can become a catalyst, inspiring and motivating others to engage in bolder ways to champion profound change. There are many creative and flexible, tax-effective opportunities that ensure the United Way and our nonprofits benefit as much as possible from your generous support.

SIX WAYS TO GIVE

1. JOIN THE TOCQUEVILLE SOCIETY

The Alexis de Tocqueville Society is a group of extraordinary individuals, businesses and community philanthropists who have a deep commitment to improving their community. They lead by example, making meaningful contributions that sustain the fundamentals of our mission. These gifts change lives by supporting the critical programs and services of local nonprofits, which you select, that create the building blocks for a better life.



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You're invited to become a member of the Tocqueville Society and join others who express their commitment to the mission of the United Way. Membership is extended to donors who contribute an annual gift of \$10,000 or more.

2. DONATE STOCK FOR TAX BENEFITS

There are a variety of creative options for donating to United Way, and many have tax benefits. Contributing securities that have appreciated in value is often more advantageous than giving gifts of cash. Highly appreciated stocks and bonds, when sold, result in a taxable capital gain. Under the Tax Reform Act of 1986, capital gain taxes significantly reduce sale proceeds.

1. You avoid capital gain tax on the appreciation.
2. You receive a charitable income tax deduction for the full present market value of the property, regardless how much the value has grown from the purchase price.
3. Our staff can work with you and your accounting professional to make this transfer of stock a simple process that will benefit you and those in need in your community.

3. ALLOCATE 401K REQUIRED MINIMUM DISTRIBUTIONS

At age 72, the Internal Revenue Service (IRS) mandates that individuals begin taking out Required Minimum Distributions (RMDs) from their 401K accounts. These RMDs are taxable unless you donate them to a charitable cause. Consider using your RMD to make a gift to the United Way of San Joaquin County. It's a tax-effective way for you to make a positive impact!

4. MAKE AN OUTSIZED DIFFERENCE WITH A GRANT FROM YOUR DONOR ADVISED FUND

Distributing a grant from your Donor Advised Fund to United Way is a terrific way to make a significant impact

on your community. If you are waiting for the ideal time to grant those funds to an organization that is transforming lives, it has arrived. Your gift will catapult our efforts to take community transformation to the next level.

5. HONOR OR MEMORIALIZE A LOVED ONE

A memorial gift is a meaningful way to remember, honor or celebrate someone important to you. These gifts, which have a lasting impact on the community, pay tribute to a special person in your life and keep their memory alive. Consider making a gift to United Way to celebrate someone close to you who is getting married, graduating, or reaching a milestone anniversary or birthday. It is unique and memorable for your loved one, and it provides hope and opportunity for those in your community.

6. LEAVE A LEGACY

You can make plans today to sustain the important work of the United Way well into the future by leaving a gift to United Way of San Joaquin County in your will or trust.

- A planned gift is a forward-thinking way to bring hope to our community, and it's a gift that keeps on giving.
- Charitable bequests are one of the easiest ways to make a planned gift; they can be allocated as cash, a percentage of a donor's total estate, or the remaining value of the estate after all other bequests have been paid.
- Deferred gifts cost nothing now and ensure that future generations will benefit from your generosity and legacy.
- There are numerous opportunities, including naming United Way as a beneficiary of life insurance policies or unused retirement assets, with many benefits like reducing the tax burden on family members.



WHY YOUR GIFT MATTERS

- Because you want to live in a thriving community with a caring culture.
- Because you can't physically volunteer but know that you can make a difference by making a gift.
- Because you care.
- Because you want to be part of the solution to the most pressing challenges in our community.
- Because United Way can scale the impact of one donation by combining it with others to support the needs that are most significant in our community.

