# UNITED IS THE WAY



we build an equitable future, ensuring everyone in our community has access to housing, food security, educational opportunities, and financial stability.

# **Asset Giving Guide**

## WHAT DOES UNITED WAY OF KING COUNTY DO?

We're building an equitable future so everyone can thrive.

Driven by the pursuit of a more equitable community, we work to meet more than just immediate housing and hunger needs; we're working side by side with communities to dismantle the systems that created these inequities in the first place.

By centering the voices and leadership of those most impacted, and building bold, trusted partnerships grounded in racial equity, we're not just helping our neighbors today—we're building a better, more equitable tomorrow.



### **HOW WE PUT YOUR ASSETS TO WORK:**

United Way drives lasting change by fueling two core funds and partnering with 143 local nonprofits—because together, we create impact at a scale no one can achieve alone.

**OUR NEIGHBOR FUND** focuses on basic needs: putting food on the table, keeping a roof over families' heads, sustaining educational opportunities for K-12 and college students, and supporting financial stability.

THE EQUITY FUND invests in transforming deep-rooted, systemic, racial inequities. We've ceded decision making power to the leaders in organizations of color who know their communities best.



# WAYS TO GIVE

When we live in community, giving benefits everybody.
Options to give include:



[Asset gifts are] a really great way to be helpful, philanthropic, and tax-effective for yourself."

-Perry Atkins, Managing Director and Family Wealth Advisor, The Atkins Group; former United Way of King County Fundraising Cabinet member and proud donor through a DAF to United Way of King County.



#### **DONOR-ADVISED FUNDS**

A <u>Donor-Advised Fund</u> (DAF) is like your own charitable savings account. You can contribute cash and non-cash assets and then recommend grants to non-profits like ours, potentially earning immediate tax benefits.



#### **STOCK**

Own stock, mutual funds, or have stock options available through your employer? Make a gift with greater impact while enjoying a double tax advantage when you give to United Way via stock.



#### IRA CHARITABLE ROLLOVER

Give from your <u>Individual Retirement Account</u> (IRA) through a Qualified Charitable Distribution. A Qualified Charitable Distribution (QCD) is a tax-efficient way for those 70  $\frac{1}{2}$  or older to donate from their IRA, while also counting towards your annual Required Minimum Distribution.



#### **LEGACY GIVING**

Leaving a <u>legacy gift</u> to United Way through your will, living trust, beneficiary designation, or retirement account is a powerful way to make a lasting impact in your community. If you don't have a will yet, consider creating one with this <u>free tool</u> to help you plan for the future. By taking the time to craft this essential document now, you can have peace of mind for the future, protect your family, and create a brighter future for generations to come through supporting our mission.



#### **CRYPTO**

<u>Cryptocurrencies</u> like Bitcoin, Ethereum and more can rapidly surge in value. Selling them for regular currency may trigger taxes. By donating appreciated crypto to United Way, you can avoid taxes and maximize impact, especially for those with substantial gains. Holding crypto for over a year may lead to federal tax deductions up to the full gift value.

# WE LIVE UNITED, WE GIVE UNITED.

Talk to your financial advisor about how giving to United Way will benefit you and our community.

For any questions, please contact **Jennifer Trice** at **(206) 461-3245** or **jtrice@uwkc.org**.





Join the movement. United is the Way.