

Endowment Management and Governance

The United Way of Greater Mercer County Endowment is managed by the United Way of Greater Mercer County (UWGMC) Board of Directors in accordance with its investment policies. The management objectives are designed to:

1. Preserve principal
2. Invest for long-term growth of the principal
3. Seek an investment yield that meets the endowment's purposes

In overseeing its investments, UWGMC's Endowment Committee, comprised of volunteer investment professionals, seeks to balance the portfolio and ensure both current income and long term growth through a mix of stocks, bonds, short-term financial instruments and alternate asset classes. All assets are invested in a diversified balance of low-cost index funds. Vanguard serves as the custodian.

Investment Policies

United Way of Greater Mercer County's (UWGMC) investment policies are designed to broadly diversify the asset pool, and regularly monitor performance of the various asset classes.

Copies of UWGMC's detailed investment policies and guidelines are available upon request.

About Us

United Way of Greater Mercer County empowers the community to take a leading role in helping achieve personal and family self-sufficiency. We focus on early childhood literacy, economic stability and mobility, and health prevention and management, which we believe are the fundamental building blocks for a good quality of life. We believe in accountability to our donors, partners and the community at large, which is a key to our success.



The purpose of this publication is to provide general gift giving information. Neither the author nor this organization is engaged in rendering legal or tax advisory service. State laws govern wills, trusts and charitable gifts made in a contractual agreement. For advice and assistance in specific cases, the services of an attorney or other professional advisor should be obtained.

Contact Us

United Way of Greater Mercer County
3150 Brunswick Pike, Ste 230
Lawrenceville, NJ 08648-2420
Contact Person: Sandra Toussaint-Burgher
Sandra.Toussaint@uwgmc.org
609-896-1912
www.uwgmc.org



UNITED WAY OF GREATER MERCER COUNTY

FOUNDERS CIRCLE

A legacy gift is a powerful and meaningful way to help ensure a strong future for our community.



United Way
of Greater Mercer County

About The Founders Circle

The Founders Circle recognizes and acknowledges donors who have arranged a bequest or planned gift to United Way of Greater Mercer County. Anyone who notifies United Way that the organization is named as the beneficiary of a gift through his or her estate, or through a planned gift during his or her lifetime, is automatically enrolled as a member of the Founders Circle.

The Founders Circle is named in honor of United Way of Greater Mercer County's formation in 1994, as a result of a merger of Delaware Valley United Way (founded in 1936) and United Way - Princeton Area Communities (founded in 1938). For a list of Circle members, please contact the United Way of Greater Mercer County.

THANK YOU FOR YOUR INTEREST IN
LEAVING A LEGACY TO HELP UNITED WAY
BUILD A BRIGHTER FUTURE FOR ALL
IN THE GREATER MERCER COUNTY AREA



BENEFITS OF FOUNDER'S CIRCLE MEMBERSHIP

Members of the Founders Circle are a part of a distinguished group that understands how generosity today impacts the generations of tomorrow. Exclusive events will help you connect with like-minded legacy stewards in our community and to United Way's high-impact work in the Greater Mercer County for years to come.

Founders Circle Members will receive:

- Special recognition in a legacy giving roster
- Exclusive invitations to local and national events where you can learn, network and socialize
- A dedicated staff who can answer your questions and work with you to execute your philanthropic goals
- Reports on the impact of your long term investment into the Mercer County area
- A Founders Circle pin – a badge of distinction

For more information on Founders Circle member benefits, please contact us.

Gift Planning

Consider new ways to make a gift that also take into consideration your personal circumstances and the needs of your heirs:

Gifts That Pay You Income

- Charitable Gift Annuities
- Charitable Remainder Trusts

Gifts You Make Today

- Memorial and Honorary Gifts
- Charitable Lead Trusts
- Donor Advised Funds

Gifts That Make an Impact After Your Lifetime

- Bequests
- Beneficiary Designations
- Endowed Gifts
- Give My Home, But Live There for Life

Leaving your Legacy

Imagine a future where all children have access to books and are able to reach their potential; where all working individuals achieve financial stability and all community members have access to the resources they need to lead healthy lives.

This could be your legacy.

As you plan for your personal financial future, you may find that a planned gift to United Way of Greater Mercer County would be mutually beneficial to you and the people who will be touched by your kindness. Besides insuring a brighter future for people in need, a properly planned gift may:

- Provide an income for life
- Reduce or eliminate capital gains taxes
- Generate a current income tax deduction
- Reduce or eliminate gift and estate tax
- Provide a much larger gift to the United Way than was ever thought possible