

# Making a Gift with your Will or Living Trust



Interested in powering the impact of United Way of Marathon County in the future but not sure how? A simple, flexible, and versatile way is through a charitable bequest. By adding a statement to your will or living trust that names United Way of Marathon County as a beneficiary of a specific dollar amount or a percentage of your estate, you can ensure that the work to strengthen Marathon County continues in the future.

## Sample Language for Your Will

*"I give, devise and bequeath (percentage, residuary share or specific amount) to United Way of Marathon County Inc., a Wisconsin not-for-profit corporation, Federal Tax ID **39-0935496** to be used for its general purposes."*

## Benefits of Making a Bequest

- ✓ A bequest allows you to retain control of your assets during your lifetime.
- ✓ A bequest will provide meaningful support to United Way of Marathon County in the future.
- ✓ A bequest is free from federal estate and income taxes.

**LEARN MORE** Contact Amanda Flannery at [aflannery@unitedwaymc.org](mailto:aflannery@unitedwaymc.org) or **715.298.5706**

for additional information on bequests or to learn more about different options for including United Way of Marathon County in your will or estate plan.



United Way  
of Marathon County

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