



## LEGACY FUND

The Ugandan Water Project's Legacy Fund is an unrestricted fund that enables the Ugandan Water Project to sustain core programs and provides long-term stability and flexibility. Our Legacy Fund offers an opportunity for you to support the mission of the Ugandan Water Project beyond your lifetime. Your generous gift our Legacy Fund ensures the future of the Ugandan Water Project.

There are many types of planned gifts, all with their unique benefits. Choosing the right planned gift depends on your personal circumstances and financial goals. To plan effectively and maximize the impact of a gift for both you and the Ugandan Water Project, it is advisable that you review your estate plans with your estate planner, financial adviser, or attorney.

### BEQUESTS

There are several types of bequest that allow you to designate how your estate will be distributed. These include specific, residuary, and contingent.

Sample Specific Bequests: "I bequeath to the Ugandan Water Project, Inc. (Tax ID 27-1481728) the sum of \$\_\_\_\_\_ (or \_\_\_\_\_% of my estate; of the property described herein) for its general purposes."

### APPRECIATED SECURITIES

Reach out to the company currently holding your stocks, bonds, or mutual fund shares (the delivering firm) and let them know how many shares you would like to donate to the Ugandan Water Project.

### LIFE INSURANCE

*(Non-Estate Gift Option)*

There are three ways to give life insurance to the Ugandan Water Project:

- Name us a beneficiary of the policy. This gift is as simple as updating your beneficiary designation form with the policy holder. You can designate us as the primary beneficiary for a percentage or specific amount. You can also make us the contingent beneficiary so that we will receive the balance of your policy only if your primary beneficiary doesn't survive you.
- Make an outright gift of an existing policy. You can name us as owner and beneficiary of an existing policy.
- Make an outright gift of a new policy. You can take out a new policy and irrevocably name the Ugandan Water Project as the owner and the beneficiary of the insurance contract.

You may be able to designate your beneficiaries directly by logging into your account. If not, simply contact your plan administrator and tell them to add the Ugandan Water Project, Inc. (Tax ID 27-1481728).

## RETIREMENT PLANS

(Non-Estate Gift Option)

You may log on to your IRA, 401(k), or other retirement plan website to designate the Ugandan Water Project as a sole or partial beneficiary of your account, or contact your plan administrator to designate your IRA, 401(k), or other retirement plan beneficiary as the "Ugandan Water Project, Inc. (Tax ID 27-1481728) for its general charitable purposes."

For the Ugandan Water Project to acknowledge your Legacy Fund designation, complete and return the form to:

Ugandan Water Project  
ATTN: Kyle Taylor  
PO Box 262  
Lima, NY 14485

Or if you prefer, you can email the completed form to our Director of Development, Kyle Taylor, at [kyle@ugandanwaterproject.com](mailto:kyle@ugandanwaterproject.com).

## CONFIDENTIAL REPLY FORM

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

To the benefit of the Ugandan Water Project (check all that apply):

- I have already made a provision to UWP through a planned gift. I made the gift through a:
- Bequest
  - Life Insurance Policy
  - IRA
  - Other: \_\_\_\_\_

- I would like more information on how to make a planned gift

## THANK YOU FOR SUPPORTING SAFE WATER!

*The information on this document is not intended as legal or tax advice. Federal and state tax rules and regulations are subject to change. Nothing on this document should be understood as advice as to the content, form, or effect of state or federal laws, rules, or regulations. This document is intended only to provide general information about options for charitable giving. For legal or tax advice, please consult an attorney.*

*The Ugandan Water Project is a registered 501(c)(3).  
Federal Tax ID: 27-1481728*

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