

## Gifts of Appreciated Securities

Many donors take advantage of the opportunity to make a significant gift using securities. You will receive a tax deduction for the full value of the securities and avoid capital gains taxes.

Any marketable security may be contributed. In accordance with Internal Revenue Service regulations, the gift value will be recorded at the average of the high and low market value on the date you relinquish control of the assets.

### Instructions

1. Contact your broker indicating the number, name and type of securities to be donated. Tell your broker you wish to initiate a "broker-to-broker" transfer. This will transfer the donated stock to United Way of Greater Milwaukee's brokerage account, at which time the donated stock will be liquidated.
2. Inform United Way of Greater Milwaukee of the number, name and type of securities contributed. Please include your name, address and place of business to ensure proper processing of your gift. Please direct correspondence, securities, remittances and inquiries pertaining to security gifts to:

**Ms. Susie Shefchik**  
Senior Accountant  
United Way of Greater Milwaukee  
225 West Vine Street  
Milwaukee, WI 53212  
414.263.8144  
sshefchik@unitedwaymilwaukee.org

Brokers may transfer the securities to Robert W. Baird, United Way of Greater Milwaukee's primary broker. Contact Tom Linn or Jackie Janich at Robert W. Baird at 414.765.7316. United Way of Greater Milwaukee's Robert W. Baird account number is 8505-1001. The Depository Trust Corporation number is 0547.

## Planned Giving: Tocqueville Legacy Circle

The United Way Tocqueville Legacy Circle was created by United Way Worldwide to honor current Tocqueville Society members who have also made legacy commitments of \$200,000 or more. This level of commitment allows the donor to continue to make a Tocqueville-level gift to United Way far into the future. The legacy commitment may be:

- A realized deferred gift of \$200,000 or more received from a bequest or similar vehicle
- An outright gift or documented written pledge of \$200,000 or more to the United Way of Greater Milwaukee endowment fund
- A written notification of a revocable or irrevocable planned gift arrangement such as a provision in a will, a life insurance policy or a split interest with a face amount or death benefit of \$200,000 or more

Whether you wish to join the Legacy Circle or make a smaller gift, please consider United Way of Greater Milwaukee as you make your estate plans. For more information contact Nicole Emer, Senior Manager of Major Gifts, at 414.263.8118 or nemer@unitedwaymilwaukee.org.

### Trustworthy and Effective

United Way of Greater Milwaukee is recognized both locally and nationally for its track record of efficiency.

United Way's high rate of efficiency is possible because of the hundreds of volunteers, including its board of directors, campaign cabinet and volunteer committees, who help with everything from organizational oversight to fundraising to program review and the funding allocation process.



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UnitedWayMilwaukee.org



United Way  
of Greater Milwaukee

## 1 Personal Information

## 2 Investment

### Payroll deduction:

- A. Amount per pay period: \$ \_\_\_\_\_
- B. Pay periods per year:  
 12 (monthly)  24 (semi-monthly)  26 (every other week)  52 (weekly)
- C. Total annual payroll deduction ( A x B )

### Bonus deduction:

Payroll deduction or check payment.

### Payment enclosed:

Make checks payable to United Way of Greater Milwaukee.

### Credit card: Starting Date \_\_\_/\_\_\_/\_\_\_

- One-time  Semi-annually  Quarterly  Monthly
- # \_\_\_\_\_ Exp \_\_\_\_\_
- Visa  MasterCard  Discover  AmEx

### Bill me: Starting Date \_\_\_/\_\_\_/\_\_\_

- One-time  Semi-annually  Quarterly

**Securities:** See back of form for information on donating stock.

## Total Annual Gift

Should match combined total of Sections 3 and 4.

### Recognition (Please check all that apply.)

- EMERGING LEADER PROGRAM:** I give \$1,200+. (Recommended age: 45 or under)
- WOMEN'S LEADERSHIP PROGRAM:** I give \$1,200+ individually or \$2,400+ with my partner.
- DIAMOND DONOR:** I am a loyal contributor with a 25+ year history.
- WILL:** I would like information on including United Way in my will.

If you wish to designate any of your gift, please indicate selections on reverse side. United Way will inform your designated organization(s) of your gift upon disbursement of designations.

- DO NOT RELEASE MY NAME TO AGENCIES**

## THANK YOU for LIVING UNITED

### GIVE & WIN™ Sweepstakes

Direct your gift to United Way's Education, Income and Health portfolio or special initiatives by 11/18/11 for a chance to win. To qualify, increased gifts must be directed to United Way in Section 3 on this form.

**Give a new or increased \$25+ to be automatically entered to win one of three prize packages:**

**INNOVATION:** iPad, 1 year of high-speed broadband, digital cable, and cable iPad app

**RELAXATION:** Trip to Costa Rica, including airfare, lodging, \$500 spending money, and \$500 pre-trip shopping spree

**ACCELERATION:** 2012 Harley-Davidson® Motorcycle and complimentary riding lessons

### DO YOU NEED EXTRA MOTORVATION?

**GIVE MORE TO WIN A CAR.** A new or increased total gift of \$50+ automatically enters you to win a 2012 Ford Focus 5-Door Hatchback donated by Johnson Controls! To qualify, increased gifts must be directed to United Way in Section 3.

Give & Win™ Sponsors: Boston Store, Tom & Rhonda Cardella, Harley-Davidson Motor Company, Infoblox, Johnson Controls, Inc., Maxvantage (a strategic alliance between Maritz and American Express), Time Warner Cable. Official rules at UnitedWayMilwaukee.org/Sweepstakes

No goods or services were provided in exchange for this contribution. Please keep a copy of this form for your tax records. Pledges paid through payroll deduction also require a copy of your pay stub, W-2 or other employer document showing amount withheld. Consult your tax advisor for more information.



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### 3 Choose Where Your Dollars Go

The Linda T. and John A. Mellows Community Impact Challenge matches new and increased gifts to United Way's Education, Income and Health portfolio from Tocqueville Society members.

Direct your gift to United Way's Education, Income and Health portfolio or special initiatives.

Select one or more below:

- EDUCATION, INCOME & HEALTH (13439):**  
160+ local programs at over 80 agencies that reach 400,000+ people each year. \$ \_\_\_\_\_
- EDUCATION (45):** Early literacy, tutoring, mentoring, drug and alcohol prevention.  
Donations matched by M&I, a part of BMO Financial Group Education Challenge Grant (\$100,000) \$ \_\_\_\_\_
- INCOME (55):** Emergency food and shelter, adult education, financial literacy, legal assistance.  
Donations matched by Fiduciary Management, Inc. Income Challenge Grant (\$50,000) \$ \_\_\_\_\_
- Individual Development Accounts (75):**  
Matched savings for postsecondary education or to buy a first home. \$ \_\_\_\_\_
- HEALTH (65):** Health care, mental health care, dental care, affordable prescriptions, substance abuse, child abuse, domestic violence, support for individuals with disabilities and older adults. \$ \_\_\_\_\_
- Healthy Girls (70):** Teen pregnancy prevention and sexual victimization prevention.  
Donations matched by Aurora Health Care Healthy Girls Challenge Grant (\$25,000) \$ \_\_\_\_\_
- Community Health Centers (40):** Health care and services.  
Donations matched by Milwaukee Health Care Partnership Health Challenge Grant (\$1+ million) \$ \_\_\_\_\_

**DIRECTED TO UNITED WAY TOTAL** \$ \_\_\_\_\_  
(\$6,000 or more per Tocqueville Society Guidelines)

**Tocqueville Community Impact Circles:** Receive additional recognition in the Leadership Registry when you contribute \$10,000+ to United Way's Education, Income and Health portfolio or special initiatives.

### 4 Individual Agency Support

#### A. Member Agencies

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_
5. \_\_\_\_\_ \$ \_\_\_\_\_

**B. Other eligible designations.** Most local health and human service 501(c)(3) organizations are eligible. United Way will contact you if you select an ineligible organization.

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_
5. \_\_\_\_\_ \$ \_\_\_\_\_

**AGENCY DESIGNATION TOTAL** \$ \_\_\_\_\_

**GRAND TOTAL** \$ \_\_\_\_\_  
(Sections 3 + 4. Must match Section 2 Total Annual Gift.)

#### TOCQUEVILLE GIVING GUIDELINES

1. Make a total contribution of **\$10,000 or more.**
2. Direct at least **\$6,000** of your gift to **United Way's** Education, Income and Health portfolio or special initiatives (Section 3).
3. No more than half of your total contribution may be directed to non-member organizations.

**Tocqueville Society Questions:** Nicole Emer, Senior Manager of Major Gifts is the main contact for the Tocqueville Society. Please don't hesitate to contact her with questions or to learn more about United Way's impact on our community. You can reach Nicole at 414.263.8118 or nemer@unitedwaymilwaukee.org.

United Way encourages at least 60% of your gift be directed to United Way's Education, Income and Health portfolio or special initiatives listed in Section 3 on this form.

Current as of July 1, 2011

### United Way Agency Program Partners

The agencies listed below receive program funding from United Way. However, your designated gift is paid out to the agency separately from and in addition to its annual United Way allocation.

<b>Milwaukee County</b>	47925 Milwaukee Christian Center	81975 Aurora Visiting Nurse Association of WI	49805 Milwaukee LGBT Community Center	<b>United Way in Waukesha County</b>
03400 American Red Cross in Southeastern Wisconsin	50775 Milwaukee Urban League	11400 Badger Association of the Blind & Visually Impaired	51040 Milwaukee Women's Center, Inc.	01255 Adaptive Community Approach Program, Inc.
23250 Aurora Family Service	54600 Neighborhood House of Milwaukee, Inc.	06750 Bay View Community Center Inc.	54825 New Concept Self Development Center, Inc.	03525 American Red Cross in Southeastern Wisconsin
81975 Aurora Visiting Nurse Association of WI	55375 Next Door Foundation	07580 Big Brothers Big Sisters of Metropolitan Milwaukee	43125 Nonprofit Center of Milwaukee Inc.	83850 Association for the Rights of Citizens with handicaps (ARCh)
11400 Badger Association of the Blind & Visually Impaired	56100 Northcott Neighborhood House	08850 Boy Scouts of America - Milwaukee County Council	58500 The Parenting Network	07575 Big Brothers Big Sisters of Metropolitan Milwaukee
06750 Bay View Community Center Inc.	17475 Pathfinders	47775 Boys & Girls Clubs of Greater Milwaukee	59100 Penfield Children's Center	08925 Boy Scouts of America - Potawatomi Area Council
07580 Big Brothers Big Sisters of Metropolitan Milwaukee	66075 The Salvation Army	11189 The Cathedral Center, Inc.	60705 Silver Spring Neighborhood Center Inc.	10925 The Caring Place, Inc.
08850 Boy Scouts of America - Milwaukee County Council	69675 Silver Spring Neighborhood Center Inc.	11325 Catholic Charities of the Archdiocese of Milwaukee, Inc.	33325 Sixteenth Street Community Health Center Inc.	11193 Catholic Charities of the Archdiocese of Milwaukee, Inc.
47775 Boys & Girls Clubs of Greater Milwaukee	86250 Walker's Point Youth & Family Center Inc.	49425 Center for Communication, Hearing & Deafness	70425 Sojourner Family Peace Center, Inc.	15060 Community Outreach Health Clinic
11189 The Cathedral Center, Inc.	86250 Wisconsin Community Services, Inc.	12001 Centro Legal	43250 St. Elizabeth Ann Seton Dental Clinic (formerly Madre Angela Dental Clinic)	18305 Curative Care Network, Inc.
11325 Catholic Charities of the Archdiocese of Milwaukee, Inc.	89400 YMCA of Metropolitan Milwaukee, Inc.	70500 Child Development Center of St. Joseph	12000 United Community Center Inc.	18305 Curative Care Network, Inc.
49425 Center for Communication, Hearing & Deafness	89925 YWCA of Greater Milwaukee	12900 Children's Service Society of Wisconsin	82650 Walker's Point Youth & Family Center Inc.	14200 Donna Lexa Community Art Center, Inc.
12001 Centro Legal		12825 COA Youth & Family Centers	86250 Wisconsin Community Services, Inc.	21901 Easter Seals Southeastern Wisconsin
70500 Child Development Center of St. Joseph	<b>Ozaukee County</b>	14850 Community Advocates Inc.	89400 YMCA of Metropolitan Milwaukee, Inc.	22496 Energy Services, Inc.
12900 Children's Service Society of Wisconsin	01428 Advocates of Ozaukee Inc.	17100 Council for the Spanish Speaking, Inc.	89925 YWCA of Greater Milwaukee	23325 Family Service of Waukesha County
12825 COA Youth & Family Centers	07650 Big Brothers Big Sisters of Ozaukee County Inc.	18300 Curative Care Network		27075 Girl Scouts of Wisconsin Southeast (GSWISE)
14850 Community Advocates Inc.	16350 COPE Services Inc.	26050 Fondy Food Center Inc.		31315 Healthy Families of Waukesha County, Inc.
17100 Council for the Spanish Speaking, Inc.	23175 Ozaukee Family Services	26086 Friedens Community Ministries, Inc.		31540 Hebron House of Hospitality, Inc.
18300 Curative Care Network	60900 Portal Industries Inc.	27225 Girl Scouts of Wisconsin Southeast		36050 Interfaith Senior Programs, Inc.
26050 Fondy Food Center Inc.	57975 Starting Point of Ozaukee, Inc.	27788 Grand Avenue Club Inc.		39600 La Casa de Esperanza, Inc.
26086 Friedens Community Ministries, Inc.	82375 Volunteer Center of Ozaukee County	57575 The Guest House of Milwaukee Inc.		83930 Literacy Council of Greater Waukesha, Inc.
27225 Girl Scouts of Wisconsin Southeast	89810 The Youth & Family Project	57576 The Healing Center		42775 Lutheran Social Services of WI & Upper Michigan
27788 Grand Avenue Club Inc.		33732 Housing Resources, Inc.		45975 Mental Health Association in Waukesha County, Inc.
57575 The Guest House of Milwaukee Inc.	<b>Washington County</b>	48600 IMPACT Alcohol & Other Drug Abuse Services Inc.		15810 NAMI Waukesha, Inc. (National Alliance on Mental Illness)
57576 The Healing Center	11325 Catholic Charities of the Archdiocese of Milwaukee, Inc.	68250 IndependenceFirst Inc.		80105 Pregnancy Support Connection Inc.
33732 Housing Resources, Inc.	17275 The Council on Alcohol & Other Drug Abuse of Washington County	36450 Interfaith Older Adult Programs, Inc.		61430 Prevention & Protection of Abused Children, Inc. (PPAC)
48600 IMPACT Alcohol & Other Drug Abuse Services Inc.		36825 International Institute of Wisconsin		64024 Richard's Place, Inc.
68250 IndependenceFirst Inc.		37275 Harry & Rose Samson Family Jewish Community Center		66225 The Salvation Army
36450 Interfaith Older Adult Programs, Inc.		37350 Jewish Family Services Inc. Robert & Miri Habush Family Center		71013 St. Aemilian-Lakeside, Inc. (Spring City Corner Clubhouse)
36825 International Institute of Wisconsin		39625 La Causa, Inc.		71325 St. Joseph's Medical & Dental Clinic
37275 Harry & Rose Samson Family Jewish Community Center		40950 Legal Aid Society of Milwaukee Inc.		72320 Stillwaters Cancer Support Services
37350 Jewish Family Services Inc. Robert & Miri Habush Family Center		42750 Lutheran Social Services of WI & Upper Michigan, Inc.		89550 Waukesha Family YMCA
39625 La Causa, Inc.		46050 Mental Health America of Wisconsin		86255 Wisconsin Community Services, Inc.
40950 Legal Aid Society of Milwaukee Inc.		46200 Meta House		88500 The Women's Center, Inc.
42750 Lutheran Social Services of WI & Upper Michigan, Inc.				89475 YMCA at Pabst Farms
46050 Mental Health America of Wisconsin				
46200 Meta House				

### Unaffiliated Agencies

The organizations listed below do not receive annual program funding from United Way. These agencies are listed because they received the highest number of designations last year or were prior year program partner agencies.

03750 American Heart Association Greater Midwest Affiliate	45685 Medical College of Wisconsin	70700 Special Olympics Wisconsin - Greater Milwaukee Area
12800 Children's Hospital and Health System	23000 Milestones Programs for Children	73590 Teen Challenge International Wisconsin, Inc.
22880 Evangelical Child & Family Agency	49300 Milwaukee Habitat for Humanity Inc.	35603 Westside Healthcare Association
26490 The Gathering of Southeast WI, Inc.	35602 Milwaukee Health Services	87600 Wisconsin Lutheran Child & Family Service
27150 Girl Scouts of Manitowish Council	50625 Milwaukee Rescue Mission	86025 Wisconsin Right to Life Education Fund
32500 Hmong American Friendship Association Inc.	70100 PEARLS for Teen Girls	88533 Women's Fund of Greater Milwaukee Inc.
49435 Hunger Task Force, Inc.	17550 Social Development Commission	86022 WRTTP/BIG STEP
41385 Literacy Services of Wisconsin	71050 St. Francis Children's Center	

### Community Health Charities of Wisconsin

The organizations listed below do not receive United Way funding. They are listed as part of a special agreement with United Way and Community Health Charities of Wisconsin.

86075 Community Health Charities of Wisconsin	22510 Epilepsy Foundation Southeast Wisconsin	54001 National Spinal Cord Injury Association - Southeastern Wisconsin Chapter
00134 ABCD: After Breast Cancer Diagnosis	26910 Gilda's Club Southeastern Wisconsin	10801 One Heartland
02044 ALS Association - Wisconsin Chapter	28413 Great Lakes Hemophilia Foundation	60376 Planned Parenthood of Wisconsin
02250 Alzheimer's & Dementia Alliance of Wisconsin	31215 Health Care for the Homeless of Milwaukee	53904 Prevent Blindness Wisconsin
02251 Alzheimer's Association - Southeastern Wisconsin	02252 Health First Wisconsin, fka, SmokeFree Wisconsin	45275 Ronald McDonald House of Eastern Wisconsin
02615 AMC Cancer Research Center	33355 The HOPE of Wisconsin	71305 St. Jude Children's Research Hospital/ALSAC
02726 American Cancer Society - Milwaukee & Midwest Division	(The Hospice Organization & Palliative Experts of WI)	85509 Southeastern Wisconsin Adaptive Ski Program (SEWASP)
02851 American Diabetes Association - Wisconsin	34350 Huntington's Disease Society of America - Wisconsin Chapter	28989 Susan G. Komen for the Cure, Southeastern Wisconsin Affiliate
03094 American Liver Foundation - Wisconsin Chapter	38085 Juvenile Diabetes Research Foundation - Southeastern Wisconsin Chapter	76351 United Cerebral Palsy of Southeastern Wisconsin
03111 American Lung Association in Wisconsin	41326 Leukemia & Lymphoma Society - Wisconsin Chapter	84945 Wheelchair Recycling Program
86080 ARC of Greater Milwaukee	42610 Lupus Foundation of America - Wisconsin Chapter	85601 Wisconsin Association for Perinatal Care
85731 The ARC-Wisconsin Disability Association	43200 The MACC Fund	85508 Wisconsin Association on Alcohol and Other Drug Abuse (WAAODA)
04950 Arthritis Foundation - Upper Midwest Region	(Midwest Athletes Against Childhood Cancer)	85505 Wisconsin Chapter, American Parkinson Disease Association
85800 Brain Injury Association of Wisconsin	43540 Make-A-Wish Foundation of Wisconsin	85510 Wisconsin Dental Association Foundation (WDA Foundation)
85801 Bread of Healing Clinic	52076 Muscular Dystrophy Association, Wisconsin	85511 Wisconsin Parkinson Association
10500 Breast Cancer Recovery	52101 Myasthenia Gravis Foundation of America - Wisconsin Chapter	88140 Wisconsin Women's Health Foundation
85802 City of Hope		
16599 CORE/EI Centro		
18098 Crohn's & Colitis Foundation of America	01951 National Alliance on Mental Illness - NAMI Wisconsin	
18581 Cystic Fibrosis Foundation - Wisconsin Chapter	53342 National Kidney Foundation of Wisconsin	
21900 Easter Seals Wisconsin	51888 National Lung Cancer Partnership	
22495 Endometriosis Association	51926 National Multiple Sclerosis Society - Wisconsin Chapter	

Estimated losses for uncollectible pledges on deferred billing will be deducted as pledge is paid out.

A processing fee and estimated losses for uncollectible pledges on deferred billing will be deducted as pledge is paid out.