



## Retiree United Way Charitable Pledge Contribution Form

Dear Retiree or Surviving Spouse:

Employees and retirees continue to support the United Way through our annual United Way Corporate Campaign. The United Way has been transformed to focus on community impact – improving lives by mobilizing the caring power of communities. Today, United Way identifies the root causes of the most serious problems in communities and brings together people and resources to tackle the issues that matter most. This represents a dynamic shift from the old United Way. United Way's new initiatives and common focus areas are helping to identify the underlying causes of the most significant local social issues, develop strategies, and pull together financial and human resources to address critical issues based on local needs, these include:

- *Success by 6@* which is helping drive lasting community change to help young children succeed in school and life. Born Learning™ is a national initiative that helps parents, grandparents, and informal care givers use every day activities to create learning moments for young children while having fun doing it.
- 2-1-1 is an easy to remember telephone number to help people find services and volunteer opportunities.
- Programs that promote financial literacy, self-sufficiency, supportive services, and homeownership

All of the above are a key link to everyone's financial/economic stability and well being over a lifetime. The true measure of success is the bottom-line results: the lives that are changed and the communities that are shaped. United Way is a national network of more than 1,300 organizations across the U.S. Visit [www.UnitedWay.org](http://www.UnitedWay.org) to find more information on your local United Way.

**We make giving to the United Way easy for you -- if you are interested in contributing simply:**

- 1. Print this form, complete both sections, keep the top portion for your income tax records (see IRS Tax ruling below)\***
- 2. Mail the bottom portion of form to the address below**

If you elect monthly deductions, we will begin deducting the amount you specify once per month from your pension check. Whichever method you choose, we will forward your contribution to the United Way on your behalf.

Thank you for supporting the United Way.

United Way Corporate Campaign Team

\*IRS regulation (IRS Notice 2006-110) requires proper documentation for each contribution to a charity made after Aug. 17, 2006. Prior law also called for "reliable" written proof. The difference now is that the IRS is being specific about the documents it requires. Proof of all donations is now needed for all contribution levels.

Employees who contribute through payroll deduction, and choose to claim a tax deduction, must have:

1. A pay stub, W2, or other employer document showing the total amount withheld for the charity,  
AND
2. A copy of the pledge card or duplicate, or a letter from the organization in order to claim a tax deduction.

Note: Employee/retirees that contribute by check must have either a cancelled check or other bank record, or proper written acknowledgement from the charity.