



Family Funds

United Way of Calgary and Area’s Family Fund program provides the opportunity to customize Donor Advised Funds to create a lasting social change for a better today, tomorrow and future for our community.

Establishing a Family Fund with United Way provides an alternative to traditional philanthropic gifts. Donors will have more flexibility to manage their philanthropic plan while optimizing tax benefits.

Family Fund Options:

United Way’s Tomorrow Fund, our legacy fund, provides a combination of endowed and non-endowed options to support your family’s unique passions. Below are the customizations we offer for family funds:

Today Funds	Future Funds	Forever Funds
<p>Offer a short-term implantation of your family’s philanthropic vision to have immediate impact in the community, ideally within a 2–5-year time frame.</p> <p>There is little to no market risk associated with this fund, fund growth would also be minimal.</p>	<p>Offer a short-term impact to offset your current earnings and capital (usually within a 10-year time frame) or provide an option to disburse capital in the future.</p> <p>There is some market risk associated with this fund due to market variability and fluctuation.</p>	<p>Offer established family legacy planning beyond this generation.</p> <p>There is some market risk associated with this fund due to market variability and fluctuation.</p>
Short Term	Non-Endowed	Endowed
<p>You are seeking to establish a family legacy beyond this generation, and your investment vision can accommodate and withstand market variables and fluctuating returns.</p>	<p>Capital is invested and distributed along with annual earnings, if and as desired.</p>	<p>Capital is retained and invested in perpetuity. Up to 4% of the market value of the fund is available for distribution each year.</p>

Added Benefits Include:



Multigenerational relationship bond

Our knowledgeable and passionate staff are there to offer customized engagement, skill building, and volunteer opportunities for individuals or groups of family members to assist in navigating your philanthropic journey.



Monitoring and impact evaluation

Our expertise in monitoring, evaluating, and reporting ensures all family members are supported to understand the impact of your investments.



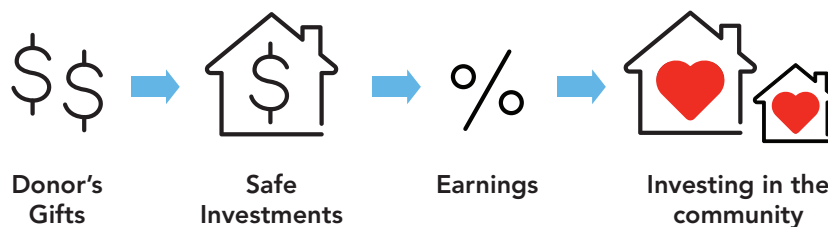
Complementary family facilitation

We apply our comprehensive approach to help you define your philanthropic mission and vision, learn more about issues you care about, and develop investment strategies to guide your charitable giving.

Our goal is to have our philanthropic experts design a personalized Family Fund, with granting supported by research and evaluation of our Community Investment team so that families can focus on the things that matter to them.

The Tomorrow Fund:

The Tomorrow Fund is United Way of Calgary and Area's Legacy Fund and Planned Giving program, supporting Calgarians to build legacies that reflect their values and vision for the future. Gifts to the Tomorrow Fund are invested for the long term, paying dividends by addressing pressing social issues and supporting local programs.



A better tomorrow **starts with you.**

Contact our Planned Giving Team to begin planning today or to request more information.

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United Way
Calgary and Area

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