

## **Planned Giving and Endowment Committee Team Member**

### **Purpose and Goal:**

The Planned Giving and Endowment Committee exists to assist United Way of Central Minnesota to grow its Legacy Society membership and ensure the continued strength and vitality of the organization. Members of the committee draw on their experience and give their time, financial support, and expertise. The committee assists in framing the basic direction of the planned giving program and works with the staff to meet goals of the program.

### **Primary Responsibilities:**

- Financially commit to the cause by making a personal gift – either a planned or an endowment gift
- Act as an advocate or solicitor on behalf of United Way of Central Minnesota (UWCM): accompany UWCM staff and fellow volunteers on relationship building and solicitation calls
- Champion United Way's goals and key messages of the Legacy Committee
- If applicable to your position, recommend and open doors to prospective donors for UWCM endowment
- Considering your expertise, advise the CEO, Director of Individual Giving and UWCM staff on current issues in state planning, wealth management, tax, endowment, and legacy-building
- Send personal thank-you notes or thank-you calls to select donors. Consider hosting events for current and prospective gift and endowment donors
- Keep committee information confidential
- Attend and participate in 2-4 committee meetings annually as schedules permits
- Be available for advisory calls and assist staff as requested

### **Composition:**

- 8-10 members
- Diversity of professional and non-professional advisor UWCM advocates

### **Time Commitment:**

- Two-year commitment and the opportunity to serve for additional years there-after
- Approximately 10-15 hours each year attending meetings or contacting potential Legacy Society members
- Additional hours for follow up conversations/meetings

### **Benefits:**

Have an opportunity to connect and network with other professionals and actively build UWCM legacy.

### **United Way Key Contact:**

Lori Eich  
United Way of Central Minnesota  
921 1st Street North, Suite  
St. Cloud, MN 56303  
(320) 229-3501  
leich@unitedwayhelps.org

*Mission: To improve people's lives by mobilizing the caring power of Central Minnesota.*