

## PLANNED GIVING NEWSLETTER #16: August 28, 2020

United Way of Pickens County is providing this newsletter as a service to our faithful supporters, because we have seen the consequences of people not having an estate plan.

Provided quarterly, this newsletter contains information about the various components of an estate plan. We hope that you will use this information to consider how your estate plan can provide for your family, reduce your tax burden, and support charities that you have supported during your lifetime.

It is not intended to provide legal or financial advice. Please seek the help of a local attorney or financial advisor before making an estate plan.

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If you wish to be removed from this mailing list, please send an e-mail to Mark Eisengrein at: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org).

### JEFF AND NATALIE PUTMAN: MAKING A DIFFERENCE IN EACH COMMUNITY ALONG LIFE'S PATH

You may have met Jeff and Natalie Putman when they hosted events at their home for United Way of Pickens County. Or, you may know that Jeff is currently serving as the Board Chair for United Way of Pickens County. We recently sat down with Jeff and Natalie to learn more about their lifetime of service and support to United Way.

"My involvement with United Way started early in my career in Greenville, SC with Daniel Construction Company," said Jeff. "At Daniel, we had an annual United Way Workplace Campaign. I really didn't know much about what United Way did for a community. I was so impressed to learn about United Way's focus and the difference they made, and 43 years later, I'm proud to say that we've given every year since!"

"Jeff and I were raised in Lenoir, a small mill town in Western North Carolina," said Natalie. "We saw people every day who were hurting and needed help. They had few options, other than the generosity of their neighbors and small churches. Growing up there influenced our attitude toward helping those in need."

Throughout their life journey, the Putmans annual support of United Way grew and grew, and Jeff started serving on the local United Way boards. "I served on the United Way boards in Greenville County, Orange County, CA, Broward County, FL, and now in Pickens County," said Jeff. "At several places, I was asked to help contact their best donors to encourage them to make a more impactful gift by joining the Tocqueville Society."

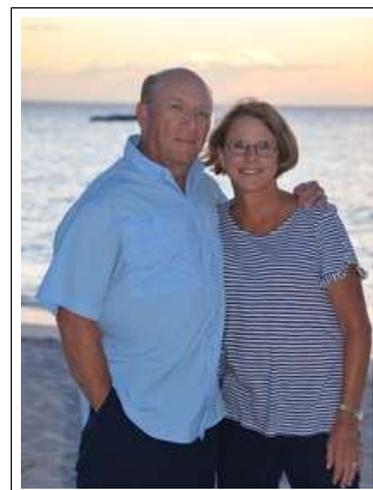
"When I was working in Ft. Lauderdale, I knew that there was a billionaire, who had an office two floors above mine," said Jeff. "I called and made an appointment with the gentleman, and I asked him to join the Tocqueville Society by contributing \$10,000 to our United Way Campaign. I'll never forget his response. He said...'Hang on, let me make a quick call. He called his friend and said: I'm going to contribute a million dollars to United Way of Broward County, and I want you to join me. He hung up the phone and said...'you've got \$2 million dollars for United Way!' I went into the appointment hoping for \$10,000 and came out of the office with a \$2 million dollar commitment. That was fun."

Natalie planned and conducted many donor recognition events in the various communities where they lived. "One of my favorite events in Ft. Lauderdale was attended by several Miami Dolphins football players, including Hall of Fame quarterback Dan Marino," said Natalie. "My daughter was a huge fan of Dan Marino, and she loved meeting him and getting him to autograph her Dolphins jersey."

Since retiring to the Cliff's Vineyards community in 2007, the Putmans have focused their energies on helping those in need in Pickens County. "I love reading to children at the local elementary schools," said Natalie. Jeff is currently serving his second term as Board Chair for United Way of Pickens County.

"I can honestly say that of all the United Way boards where I've served, United Way of Pickens County has made more of an impact than the other United Way organizations where we lived," said Jeff. "The needs in Pickens County are pretty dire, and I feel great about the difference we are making to help those in need, and to improve the quality of life for everyone."

"My Dad taught me that at each stop along our life's path, we should leave things better than when we found them," said Jeff. United Way of Pickens County is so grateful to Jeff for his



Jeff and Natalie Putman

leadership as Board Chair, and for the Putmans generous annual support. And when the Putmans were invited to join the Heritage Society by including United Way of Pickens County in their estate plan, they enthusiastically said YES!

## HAVE YOU CONSIDER ENDOWING YOUR ANNUAL GIFT?

You can make your annual support of United Way of Pickens County last forever by endowing your annual gift. Each endowment gift is deposited into our Endowment Fund, which is a forever-fund that is conservatively invested with only a portion of the annual earnings being used to support United Way initiatives. By endowing your annual gift, you will be providing a reliable source of funding that can withstand fluctuations in the economy, while allowing United Way of Pickens County to help people in our community...year in and year out! AND, your endowed annual gift will be a symbolic way for you to play an enduring role in our mission, long after you are gone.

**Here's how it works:** Each year, John and Sue donate a \$1,000 gift to United Way. They wanted their annual donation to become a "forever gift", and decided to donate \$25,000 to endow their annual donation. An endowed annual gift can be comprised of cash, stocks, real estate, or even a gift through your will. Only a percentage of the earnings (4% of the endowed annual gift or \$1,000) will be spent annually to help people in need. The remainder of the endowed gift will be invested, allowing John and Sue's donation to continue providing a \$1,000 annual gift forever. And, your endowed annual gift can be restricted to support a special program that you believe in and that United Way of Pickens County funds, such as Camp iRock.

Here are some examples of how you can endow your annual gift by making a one-time endowment gift:

<u>If Your Annual Gift is:</u>	<u>You Can Make a One-Time Endowment Gift of:</u>	<u>Resulting in:</u>
\$100	\$2,500	\$100 annual gift, forever!
\$400	\$10,000	\$400 annual gift, forever!
\$1,000	\$25,000	\$1,000 annual gift, forever!
\$10,000	\$250,000	\$10,000 annual gift, forever!

If you are interested in discussing how you can endow your annual gift, contact Mark Eisengrein at 864-850-7094 ext. 108 or email him at [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org).

## HERE'S A UNIQUE WAY TO SUPPORT UNITED WAY OF PICKENS COUNTY: MAKE A BEQUEST

A simple way to support United Way of Pickens County is to make a "bequest" or a final gift in your estate plan. Anyone can make a bequest—in any amount—to any individual or charitable organization. A charitable bequest to United Way of Pickens County can be unrestricted and used for general purposes, or restricted for a specific purpose or program that you believe in.

Here are some ways that you can make a bequest to United Way of Pickens County through your will:

**Specific Bequest:** "I hereby give, devise and bequeath \$\_\_\_\_\_ upon my death to United Way of Pickens County (a nonprofit organization located at 201 South 5<sup>th</sup> Street, Suite 212, Easley, SC 29640, Tax ID# 57-0476249). I request that this estate gift be deposited in their Endowment Fund, where funds are conservatively invested in perpetuity, and only a portion of the annual earnings may be used to support UWPC initiatives to help those in need in Pickens County."

**Percentage Bequest:** "I hereby give, devise and bequeath \_\_\_\_ % of my total estate upon my death to United Way of Pickens County (a nonprofit organization located at 201 South 5<sup>th</sup> Street, Suite 212, Easley, SC 29640, Tax ID# 57-0476249). I request that this estate gift be deposited in their Endowment Fund, where funds are conservatively invested in perpetuity, and only a portion of the annual earnings may be used to support educational initiatives, like Camp iRock."

**Contingent Bequest:** "I wish to leave my beach house at \_\_\_\_\_ (address) to my sister. But, if my sister does not survive me, the beach house will be sold with proceeds going to United Way of Pickens County (a nonprofit organization located at 201 South 5<sup>th</sup> Street, Suite 212, Easley, SC 29640, Tax ID#57-0476249). I request that this estate gift be deposited in their Endowment Fund, where funds are conservatively invested in perpetuity, and only a portion of the annual earnings may be used to support annual programs that provide food, shelter and healthcare."

Once your will is finalized, it is important to clearly communicate your charitable intentions with your family, and to any organization that is named as a beneficiary.



You are invited to join the *Heritage Society* by pledging an estate gift to United Way of Pickens County. Unless otherwise indicated, your final gift will live on in the Endowment Fund helping those who struggle to access food, shelter, and healthcare in our community. And, you will be supporting United Way of Pickens County's bold goal that 70% of 3<sup>rd</sup> graders read at grade level. *Heritage Society* members gather annually to welcome new members, and to hear an update about the work that their annual support is making possible. If you want to help Pickens County residents in need for generations to come, simply contact Mark Eisengrein at 864-850-7094 ext. 108 or email at: [meisengrein@uwpickens.org](mailto:meisengrein@uwpickens.org)