

# CONTRIBUTION FORM

**1. Your annual Tocqueville Society gift to United Way is an investment in the long-term solutions to critical challenges facing children and families in Orange County.**

Salutation \_\_\_\_\_ First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 Spouse/Partner: First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Email \_\_\_\_\_ Preferred Phone \_\_\_\_\_  Home  Cell

Company Name (If Applicable): \_\_\_\_\_  
 Job Title \_\_\_\_\_ Location / Department \_\_\_\_\_  
 Company Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Work Email \_\_\_\_\_ Work Phone \_\_\_\_\_

**2. Acknowledgement:**

Please list my donation:

- Individual Names, Family, or Organization** \_\_\_\_\_  
 **Anonymous** (Your name will not appear on printed materials or the website.)

As a Tocqueville Society Donor, \$2,500 or more of your gift directly supports our Community Impact work in Education, Income, Health and Housing. By giving \$10,000 or more to the Orange County United Way's Community Impact Fund, you will be recognized as an Orange Impact Member.

**3. Tocqueville Society Member Pledge (\$10,000+) \$ \_\_\_\_\_**

- Orange Impact Member:** Direct my entire gift amount to support the Community Impact Fund  
 **Orange Impact Member:** Direct \$ \_\_\_\_\_ (Minimum of \$10,000) to support the Community Impact Fund

**Your Investment**

**A. Community Impact Fund Investment**

Of your total minimum \$10,000 investment, the greater of \$2,500 or 10% (or more) is invested in United Way's Community Impact Fund and our work to improve Housing, Health, Education and the Financial Stability of everyone in Orange County.

**Subtotal \$ \_\_\_\_\_**

**B. Women's Empowerment Portfolio Investment**

A minimum of \$1,000 up to the balance of your gift is invested in the Women's Empowerment Portfolio. Women's Empowerment Portfolio investments are put to work with local programs dedicated to supporting financial stability for women and girls in Orange County to build self-sufficiency through the Women's Philanthropy Fund Grant Program.

**Subtotal \$ \_\_\_\_\_**

**C. Donor Directed Gift**

I'd like to designate the remaining amount to one or more non-profit organizations that qualify as a tax deductible charity (minimum annual gift is \$250.) If the organization does not qualify, funds will go to United Way's Community Impact Fund. Note: If you choose to make distributions over 12 months, you will be asked to complete a Tocqueville Society Donor Advised Fund agreement and use the Advised Fund Designation/Grant Request Form.

\_\_\_\_\_  
 Name of 501(c)(3)

\_\_\_\_\_  
 Address                                      City                                      State                                      Zip Code

Do not release my name to the agency

**Subtotal \$ \_\_\_\_\_**

**Total Annual Investment**

**(A + B + C = Total) \$ \_\_\_\_\_**

**FOR INTERNAL USE ONLY**

Updated in CRM

**Gift Options**

**Payroll Deduction**  
 Please contact the payroll department within your company

**Payment Enclosed**  
 Make checks payable to Orange County United Way.  
 Check # \_\_\_\_\_

**Credit/Debit Card**  
 Payment Schedule:  
 In full charge (min. \$10,000)                                      \$ \_\_\_\_\_  
 Quarterly charge of (min. \$2,500)                                      \$ \_\_\_\_\_  
 Monthly charge of (min. \$834)                                      \$ \_\_\_\_\_

\_\_\_\_\_  
 Name on card

\_\_\_\_\_  
 Card Number                                      Expiration (MM/YY)

\_\_\_\_\_  
 Date to Charge Credit Card

**Gifts of Security/Stocks**  
 Please contact Orange County United Way at (949) 263-6153 for more information.

**Please invoice me:**  
 In Full  Quarterly  Monthly

**Total Gift (Payable over 12 months) \$ \_\_\_\_\_**

\_\_\_\_\_  
 Beginning Date

\_\_\_\_\_  
 Signature (required)                                      Date

Your gift is tax deductible if you itemize your taxes. Consult your tax professional.

Thank You! Together, we are creating a stronger community where future generations will thrive.  
 Orange County United Way 501(c)(3) FEIN# 33-0047994  
 18012 Mitchell South, Irvine, CA 92614

For more information about Tocqueville Society and membership opportunities, please contact  
 Kristine Peters at [KristineP@UnitedWayOC.org](mailto:KristineP@UnitedWayOC.org) or 949.263.6139.