Leading the Way

TRANSFORMATIVE LEADERSHIP GIFTS
LEADING THE CHANGE IN OUR COMMUNITY

Leadership gifts and investments from our community are critical as we work together to help children and families take the first steps on a path out of poverty. Together, we can help more families move closer to self-sufficiency and a better life. Together, we can help more families thrive.
WHO WE ARE

We are the unifier that harnesses the collective power of resources to achieve results no one partner can achieve on its own.

We work with agencies and families, lifting them out of poverty, opening up educational opportunities, providing access to healthcare and bringing relief in crisis. We repair and build stronger foundations that address pervasive, systemic gaps for people in our community and, at the same time, tackle immediate needs for those impacted by crisis, such as the COVID-19 pandemic.

By working with social services agencies, governmental agencies, community leaders, donors and more, we wrap our community in unending support. And, as we work together, the power of generous donors, hard-working agency teams and solution-seeking community advocates demonstrate that our efforts can be applied further, for more people and in more places, than if we were working alone. That’s the true way to help. The United Way.

United Way of Greater Cincinnati is made up of a workforce of more than 90 committed individuals, tens of thousands of volunteers, 62,000 donors, more than 1,000 partner companies and 137 best-in-class social services agencies. Together we are dedicated to helping all people across our region to thrive.

HOW WE DO IT

United Way’s approach is based on a simple value proposition: United is the best way to help. Through this approach, we are uniquely able to drive our community’s effort to help all families build sustainable financial foundations. We do this in three ways:

1. We understand community challenges.

2. We bring organizations together to do more.

3. We create new solutions to meet community needs through impact. In 2019:

- **440 Success By 6®** school and community partners worked to fill gaps in early education opportunities.
- **136,000** requests for service fielded by United Way 211.
- **10,400** total tax returns processed by United Way of Greater Cincinnati’s Free Tax Prep Coalition, helping families receive the Earned Income Tax Credit.
- **285** families avoided homelessness and disruptive school moves through Stable Families.
- **13 Black leaders** joined Champions of Change, a leadership and design program, which launched Black Empowerment Works to provide grants and support for black-lead ideas, programs and projects addressing poverty.
$10 MILLION

Dollars annually impacting the community from Tocqueville and Centennial Society donors like you.
Tocqueville members are a generous group of successful, philanthropic leaders who support United Way and our community at an outstanding level. They are some of our region's most influential business and civic leaders — each making a difference in the lives of people who need it most.

Inspired by Alexis de Tocqueville, a French political philosopher who famously admired American philanthropy, United Way's Tocqueville supporters embody the same generous American spirit that Tocqueville fell in love with centuries ago.
YOUR EXPERIENCE

When Tocqueville Society members meet, they create a powerful force for good. Your transformative gift provides opportunities to network with fellow members throughout the year at exclusive, in-person (and virtual) events such as First Tuesday luncheons and Tocqueville: Connected to the Community receptions. Leveraging their professional expertise, personal skills, and passion for supporting the community, members often speak to the collective network at these great events. In the past 3 years, Tocqueville Society donors have heard from current members such as:

John Banchy, The Children’s Home of Cincinnati
Richard Boehnne, E.W. Scripps (Retired)
Archie Brown, First Financial Bank
Greg Carmichael, Fifth Third Bank
Garren Colvin, St. Elizabeth Healthcare
David Faulk, Macy’s Inc. (Retired) & Inspired Talent Management
Suzette & Michael Fisher, Cincinnati Children’s Hospital Medical Center

Kay Geiger, PNC Bank
Father Michael J. Graham, S.J., Xavier University
Nancy & Trey Grayson, Horizon Community Funds of NKY & Frost Brown Todd LLC
Dr. Richard Lofgren and Dr. Evie Alessandrini, UC Health
Carrie & John Hayden, CJH Consulting
Kim & Gary Heiman, Standard Textile Co., Inc.
Terry Horan and Dominic Franchini, HORAN
Gary “Doc” Huffman, Ohio National Financial Services
Heidi Jark, The Foundation at Fifth Third Bank
Robert Jones, GE Aviation
Kelly Kolar, Kolar Design Inc.
Rodney McMullen, The Kroger Co.
Julia Poston, EY (Retired)
Jim Scott, 700WLW (Retired)
Julie & Steve Shifman, Michelman
David Taylor, The Proctor and Gamble Company
Barbara Turner, Ohio National Financial Services
Susan Zaunbrecher, Fifth Third Bank
YOUR NETWORK

The Tocqueville Society is a network of 600+ households consisting of the region’s top community/business leaders and their spouses. Request a roster to see the full breadth of your Tocqueville network.

Through the network, Tocqueville members have access to like-minded individuals who share a similar philanthropic vision for the region as well as access to resources tailored to show you how your investment strengthens the community.

“Missy and I have been longtime supporters of United Way and its mission as we understood early on the dramatically positive impact that it has on the entire region. The decision to support at the Tocqueville & Centennial Society levels was simple as the needs of our disadvantaged and underserved neighbors continues to grow and we are committed to supporting the effort to make things better for them.”

– Missy and Kerry Byrne
**Strong Leadership**

The vision of some of our region’s best and most influential leaders help shape Greater Cincinnati’s Tocqueville chapter into the powerful, impactful group that it is today.

**2019-2020 Tocqueville Committee Chairs and Members:**

Helena Brooks, Span Concepts  
Brad Daugherty, Queen City Hospice & Palliative Care  
Kelly Dehan, Besl Transfer Co. (Retired)  
Jean Donnell, Marsh & McClennan Companies, Inc. (Retired)  
Daniel Fleming, River Cities Capital Funds  
Sharon Inman, ProKids CASA  
Frank Leggio, Deloitte  
Joshua Lorentz, Dinsmore & Shohl LLP  
Moira Lyon, Oswald Companies  
Deborah Majoras, The Proctor and Gamble Company  
Mary Morand, Mary Morand Talent Agency  
Maribeth Rahe, Fort Washington Investment Advisors, Inc.  
Cynthia Starr, Mayfield Brain & Spine  
Lee Stautberg, Dinsmore & Shohl LLP  
Joel Stone, Fifth Third Bank  
Tina Surface, Fifth Third Bank  
George Vincent, Dinsmore & Shohl LLP  
Rebecca Wood, Fund Evaluation Group  
James M. Zimmerman, Taft Stettinius & Hollister, LLP  
Aaron Zboril, Deloitte

**Past Tocqueville Committee Chairs:**

Colleen Athans, GE (Retired)  
Laura Brunner, The Port  
Paul Brunner, Cowan’s Auctions  
Bret Caller, Viking Partners  
Tim Elsbrock, Fifth Third Bank  
Kathy Haines, Deloitte  
Kim Halbauer, Fifth Third Bank  
Terry Horan, HORAN  
Amy Kendall, Chubb  
Jean Lauterbach, Vistage Worldwide  
Jill McGruder, Western & Southern Financial Group  
Dennis Schoff, Ohio National Financial Services  
George Yund, Frost Brown Todd LLC
C E N T E N N I A L S O C I E T Y
Individual and household gifts of $25,000

This premiere group of supporters are leading the way to an even better community by making significant gifts that accelerate change, engage other leaders and connect their peers to join the life-changing work we’re leading together.

Centennial Leadership
The dedication and hard work of Cincinnati’s most talented leaders help to launch and shape the Centennial Society and its Roundtables.

These leaders represent a small part of this group of distinguished members. Request a roster to see the full breadth of your Centennial Society network.

2020 Centennial Society Co-Chairs:
Karen and Mark Jahnke
Patty and Frank Leggio
Julia and Dan Poston
Gretchen and Rob Reifsnyder
Julie and Steve Shifman

Past Chairs:
Julie and Steve Shifman (2015 Founding Chairs)
Deanna and Chris Froman
Susan and Lars Anderson
Ann and Mike Michael
Doug Bolton
Archie Brown
“The reason for our involvement is quite simple. United Way is the single organization that analyzes the human service needs of our Greater Cincinnati area and promotes and raises the funds for programs and services needed to address these needs through its 137 member agencies. People’s lives are better and our entire community is better because of United Way.”
— Chris and Trey Heekin Family

**ROUND TABLES**

*Individual and household gifts of $100,000*

United Way Roundtables, our greatest levels of support, allow some of the most successful people in our community to invest in our most impactful work. This special group of investors ensures our collective work reaches its highest potential across our region.

**Ten Million Dollar Roundtable**

**Five Million Dollar Roundtable**

**Four Million Dollar Roundtable**

**Three Million Dollar Roundtable**

**Two Million Dollar Roundtable**

**Million Dollar Roundtable**

**William Cooper Procter Roundtable ($500,000)**

**Frederick A. Geier Roundtable ($250,000)**

**Centennial Society Roundtable ($100,000)**
**YOUR EXPERIENCE**

Centennial Society and Roundtable members have complete access to a full portfolio of donor events and supporter privileges at the Tocqueville level.

In addition to this collection of rich programming and networking, members have exclusive access to networking events with top regional and national leaders such as:

Meg Whitman, Former President and CEO of Hewlett Packard Enterprise
Michael Fisher, CEO, Cincinnati Children’s Hospital Medical Center
Tom Williams, CEO, North American Properties
Richard Davis, Executive Chairman, U.S. Bancorp
David Taylor, President & CEO, The Proctor and Gamble Company
Father Michael J. Graham, S.J., President, Xavier University
Julia Poston, Managing Partner, EY
Tim Massa, Chief People Officer, The Kroger Co.
Mike Hayde, CEO, Western National Group

“Good organizations build on learning and continuously improve—difficult times often accelerate constructive change. As 30 year investors of time and resources, we continue to expect accountability and demonstrable results at United Way and its partner agencies. Our gift this year is a reaffirmation of the critical mission of United Way and its leadership as positive change agents in a community we love.”

– Cynthia and Gregory Kenny
THE FOUNDATION

The Foundation, founded in 1983, is a collection of endowed gifts that provides sustainable funding for United Way. These legacy gifts are accelerating the mission of United Way. They’re building a foundation for our community’s future. Imagine the impact of an entire generation coming together to endow its annual giving. It would create stability in program funding, encourage new strategies to flourish and allow great programs to expand. To transform our community, we must set a precedent of caring for its future.

Past Foundation Board Chairs include:

Merwin Grayson, Jr.
Carrie K. Hayden
Kip (Christopher) Heekin
Lisa O’Brien
Dave Phillips
Rosemary Schlachter
George Yund

“We believe leaving a legacy gift is an important component in our overall philanthropy plan. Supporting the people United Way agencies serve is the right thing to do no matter what changes and challenges may exist. Community needs will always exist, and we want our legacy gift to have a positive impact well into the future.”

– Alison and Jim Zimmerman
LEGACY LEADERS SOCIETY

As a Legacy Leader, you create lasting impact. It’s not just giving for today or tomorrow, it’s giving for the future. As a Legacy Leader you have access to United Way’s full portfolio of supporter privileges and donor events where we’ll recognize your tremendous support.

Legacy Giving

When you include a gift as part of your overall estate and financial plans to support United Way of Greater Cincinnati Foundation, you are improving lives and creating lasting change in your community. Planning a gift can be as easy as leaving United Way in your will. Your generosity will leave a legacy of support for programs and initiatives that will have an impact for years to come (Tax ID: 31-1064812)
LEGACY LEADERS SOCIETY

United Way of Greater Cincinnati Foundation provides the financial stability and flexibility to create long lasting solutions for our community, for generations to come. There are a number of ways to make a legacy gift. A few of which include:

- Outright gift of cash, appreciated stock, real estate, business interests or closely held stocks
- Designate United Way as the beneficiary of a retirement account, current life insurance policy, new policy or United Way Life™ policy
- Make a bequest by designating United Way in your will
- Create a split gift such as a charitable gift annuity, charitable remainder trust or charitable lead trust

Whether you would like to put your donation to work today or as part of your legacy, we can help you find a plan that fits the needs of your family and your community. We will meet with you and coordinate with your tax, legal and financial advisors to identify the giving method that best meets your financial and philanthropic needs.

“We are confident in United Way’s dedication to and effectiveness in continually reducing the effects of poverty in our community. We felt it was important to provide a principal gift to United Way at our deaths which would generate the cash needed to continue our annual contributions after we are gone.”

– Bill Montague and Kelly Wittich
WAYS TO FULFILL YOUR GIFT

We sincerely appreciate your leadership, commitment and influence because we know united is the best way to help every person in our community. Thank you for your generosity, expertise, time and for choosing to lead the way. Work with us to fulfill your gift in a variety of ways.

- Online at www.uwgc.org/give
- Payroll deduction
- Stock & securities
- Planned giving

MAJOR GIFTS AND TOCQUEVILLE SOCIETY GIVING LEVELS

<table>
<thead>
<tr>
<th></th>
<th>YEAR 1</th>
<th>YEAR 2</th>
<th>YEAR 3</th>
<th>YEAR 4</th>
<th>YEAR 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1M Roundtable</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
</tr>
<tr>
<td>William Cooper Procter Roundtable</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
</tr>
<tr>
<td>Frederick A. Geier Roundtable</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>Centennial Society Roundtable</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$25,000</td>
<td></td>
</tr>
<tr>
<td>Centennial Society</td>
<td>$25,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tocqueville</td>
<td>$10,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

STEP-UP PROGRAM

Start with a step-up gift amount that incrementally increases over multiple years while you enjoy membership benefits starting year one.

<table>
<thead>
<tr>
<th></th>
<th>YEAR 1</th>
<th>YEAR 2</th>
<th>YEAR 3</th>
<th>YEAR 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centennial Society</td>
<td>$15,000</td>
<td>$20,000</td>
<td>$25,000</td>
<td></td>
</tr>
<tr>
<td>Tocqueville</td>
<td>$5,000</td>
<td>$7,500</td>
<td>$10,000</td>
<td></td>
</tr>
<tr>
<td>Tocqueville (under age 45)</td>
<td>$2,500</td>
<td>$5,000</td>
<td>$7,500</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

* Membership and recognition available based on household giving. Contact us to learn more about how to add your spouse/significant other to the recognition list to receive emails, updates, and invitations, or how to combine your gifts to reach a higher level of recognition. All gifts are appreciated and will help children and families across our region. For an in-person update on how your gift is changing lives in our community, contact a member of the United Way of Greater Cincinnati team at leaders@uwgc.org or 513-762-7207.
For more information, please contact your United Way of Greater Cincinnati team member.

United Way of Greater Cincinnati
2400 Reading Road
Cincinnati, OH 45202-1478
(513) 762-7100

Clermont & Brown Counties
948 Cincinnati Batavia Pike
Cincinnati, OH 45245-1332
(513) 536-3000

Middletown Area
6820 Roosevelt Avenue, Suite D
Middletown, OH 45005-5798
(513) 705-1160

Northern Kentucky
2120 Chamber Center Drive
Ft. Mitchell, KY 41017-1669
(859) 525-2600

Southeast Indiana
227 Walnut Street
P.O. Box 3465
Lawrenceburg, IN 47025-3465
(812) 537-2009

www.uwgc.org

United Way of Greater Cincinnati