Leading the Way

TRANSFORMATIVE LEADERSHIP GIFTS

United Way
of Greater Cincinnati
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 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 were fielded by United Way 211.
   - 10,400 total tax returns were 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-led ideas, programs and projects addressing poverty.
$10 MILLION
Dollars annually impacting the community from Tocqueville and Centennial Society donors like you.
Tocqueville

*Individual and household gifts of $10,000*

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.
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 Boehne, 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 Office 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 Procter 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 continue 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 (Retired)
Joshua Lorentz, Dinsmore & Shohl LLP
Moira Lyon, Oswald Companies
Deborah Majoras, The Procter 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 Aviation (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

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Virtual and In-Person Event Opportunities

Rodney McMullen
Jim Scott
Moira Weir
Creating Lasting Change
**CENTENNIAL SOCIETY**

*Individual and household gifts of $25,000*

This generous group of supporters are leading the way to an even better community by making significant gifts that accelerate change, engage other leaders and connect with 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 Jahne
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 most generous levels of annual 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)*
“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

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 Procter and Gamble Company
- Father Michael J. Graham, S.J., President, Xavier University
- Julia Poston, Managing Partner, EY (Retired)
- Tim Massa, Chief People Officer, The Kroger Co.
- Mike Hayde, CEO, Western National Group
LEAVING A LEGACY
“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

Past Foundation Board Chairs include:
Merwin Grayson, Jr.
Carrie K. Hayden
Kip (Christopher) Heekin
Lisa O’Brien
Dave Phillips
Rosemary Schlachter
George Yund
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

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STEP-UP PROGRAM

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

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* 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

LIVE UNITED®