

Tocqueville Society

Member Handbook

2018

Please save this document for your reference, as it will be helpful to you in the future.

**United Way
of Central New Mexico**

2340 Alamo Avenue SE, 2nd Floor
Albuquerque, NM 87106
(505) 247-3671
www.uwcnm.org



Welcome to the Tocqueville Society

Welcome! The Tocqueville Society is a leadership giving program designed for you. It fosters, promotes, and recognizes the vital importance of voluntary community service and personal giving at an exceptional level while providing convenience, flexibility and donor benefits to you as one of our top philanthropists.

The Tocqueville Society, created in 1972 by United Way Worldwide, was named for the 19th century French diplomat Alexis de Tocqueville. He wrote with admiration about the unique spirit of volunteerism in America, a spirit certainly demonstrated at United Way. The United Way of Central New Mexico chapter of the Society was established in 1996 with four members. Today it has more than 350 community, business, and philanthropic leaders like you whose generosity reflects an extraordinary dedication to positive change and inspires a better life for those in need in the four-county area. The Society demonstrates:

LEADERSHIP: Throughout history, distinct individuals have demonstrated the fortitude and perseverance to effect change. You can make that change.

PHILANTHROPY: United Way of Central New Mexico welcomes the opportunity to unite individuals and institutions while being responsive to changing community needs. That is why you can make one gift to United Way and have it distributed according to your personal interests. This model allows recognition of the total philanthropic generosity of our investors and projects the spirit of leadership and benevolence throughout the entire community.

COMMITMENT TO CARING: Tocqueville lauded the way Americans never failed to help fellow citizens. In every community, there is work to be done. In every heart, there is the power to do it.

Thank you for being a part of this tremendous work. I look forward to serving you in your philanthropic giving and am always available to you.

Sincerely yours,



Melissa J. Dracup
Director | Tocqueville Society
United Way of Central New Mexico
505-247-3671, ext 735
melissa.dracup@uwcnm.org

Benefits at a Glance

Inspire the generosity of others by setting an example.

Connect with others who share your values and the importance of philanthropy in our lives.

Organize and simplify your charitable giving with a **Personal Philanthropy Account**:

- ✿ Direct your charitable gifts to your favorite organizations throughout the year at times that are convenient to you.
- ✿ Receive annual and quarterly statements of your charitable giving to keep track of your gifts and keep your records complete and organized.
- ✿ Access to “DonorLink,” United Way’s online account activity viewing.
- ✿ Choose from a variety of transaction types to make your giving convenient. Give by credit card*, payroll deduction, check, stock transfer, cash or a combination of any. Receive payment reminders or set-up periodic payment schedules if you wish. **There is a required minimum gift of 3% to our Cornerstone Program when using a credit card.*
- ✿ Receive professional, personalized service in managing your account from our Tocqueville Society Donor Relations Officer.

Receive invitations as part of the Tocqueville philanthropic family to events throughout the year featuring special guests at special venues about topical issues.

Be recognized for your giving in the United Way of Central New Mexico Leaders in Giving publication and in other forms of recognition per your preferences (please see Tocqueville Society Recognition and Giving Levels for more information).

Get connected to United Way of Central New Mexico: participate in volunteer engagement and leadership opportunities:

- ✿ Women United: www.uwcnm.org/wip
- ✿ Hispano Philanthropic Society: www.uwcnm.org/hps
- ✿ Young Leaders: www.uwcnm.org/yls
- ✿ Guys Give: www.uwcnm.org/guys-give

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Contact Information

RANDY WOODCOCK

Vice President & Chief Development Officer

Phone: (505) 245-1732; Cell: (505) 350-2832; Email: Randy.Woodcock@uwcnm.org

- Questions/Concerns/Ideas
- Your Philanthropic Goals
- Community Issue Areas & Community Fund Questions



MELISSA DRACUP

Director of the Tocqueville Society

Phone: (505) 245-1754; Cell: (505) 350-2561; Email: Melissa.Dracup@uwcnm.org

- Membership
- Your Philanthropic Goals
- Events



LARRY STRICKLAND

Director of Donor Impact

Phone: (505) 245-1749; Cell: (505) 975-7556; Email: Larry.Strickland@uwcnm.org

- Your Philanthropic Goals
- Planned Giving

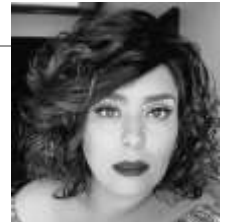


EVITA SINCLAIR

Tocqueville Society Donor Relations Officer

Phone: (505) 245-1750; Email: Evita.Sinclair@uwcnm.org

- Your Contributions
 - Designations of the recipients you choose
 - Payouts to the recipients you designate
- Contact information changes
- Events
- General Questions



GENERAL INFORMATION

A large amount of current information is available at www.uwcnm.org and/or <https://www.uwcnm.org/you-can-help/join-group/tocqueville-society>. This website can answer many questions and provide information on the many facets of this unique United Way. Of course, you may always call us and ask as well! Normal business hours are Monday through Friday from 8:30 a.m. to 4:30 p.m. We will also be happy to meet with you in person at a place and time convenient to you.

Our phone number is: (505) 247-3671

Our mailing address is:
2340 Alamo Ave. SE, 2nd Floor
Albuquerque, NM 87106

2018 Tocqueville Campaign Committee

Thank you to our volunteer donors whose leadership has made the United Way of Central New Mexico's Tocqueville Society one of the largest and fastest-growing Societies nationally. These leaders help with our year-round campaign to both attract new donors to the Society and help retain our current donors.

CO-CHAIRS

Billy Gupton
Merrill Lynch

Craig Trojahn
CWT Financial

Rachel Gupton
Sandia National Laboratories

Lynn Trojahn
Thrive Consulting

VICE-CHAIRS

Jim Asperger
Crest Mechanical Systems

Clay Holderman
Presbyterian Healthcare Services

Joshua Parsons
Sandia National Laboratories

Arlen Biersgreen
Air Force Research Labs

John Johnson
Presbyterian Healthcare Services

Ed Rivera
United Way of Central New Mexico

Elizabeth Biersgreen
Community Volunteer

Lisa Kruger
Rio Grande Realty & Investments LLC

Alex Romero
Hispano Chamber of Commerce Retiree

Jessica Carothers
Community Volunteer

Todd Kruger
Rio Grande Realty & Investments LLC

Anna Sánchez
City of Albuquerque

Dr. Josh Carothers
New Mexico Orthopaedic Associates

Beverly McMillan
Family Advocacy Center

Dr. Gabriel Sánchez
University of New Mexico

Paul Cassidy
RBC Capital Markets Retiree

Lennard McMillan
Retired

Mark Sellers
Sandia National Laboratories

Connie Cassidy
Community Volunteer

Bill Miera
Fiore Industries

Tony Trujillo
Holman's, Inc.

Cole Flanagan
Maestas and Ward Commercial Real Estate

David Montgomery
Annapurna Vegetarian Café

Lisa Webster
EEA Consulting Engineers

Kelcy Flanagan
New Mexico Society of CPA's

Ronald Moya
Sandia National Laboratories Retiree

Judy Zanotti
Linx

Yashoda Naidoo
Founder & Owner
Annapurna Vegetarian Café

Invest in your Community through the work of United Way of Central New Mexico

Designate all or part of your gift to the work of United Way of Central New Mexico by selecting any of the following uses for your gift.

UNRESTRICTED

For area of greatest need among the following:

COMMUNITY WIDE INITIATIVES

- **Mission: Families** – Focus on Family Stability.
- **Mission: Graduate** – A Cradle-to-Career education partnership with other community leaders, aligning, coordinating, and evaluating services to support students
- **Basic Needs Program Grants** – Funding for programs serving the most vulnerable and those experiencing a temporary crisis such as housing, hunger and transportation.

DONOR GROUP INITIATIVE GRANTS

- **Women United Women's Economic Self-Sufficiency Fund** – Create systemic change that provides a continuum of services to address the most pressing issues for women.
- **Hispano Philanthropic Society's Middle School Initiative Fund** – Empower youth (5th – 9th grade) to reach their highest potential through education, mentorship, and community engagement.
- **Young Leaders Society's High School Initiative Fund** – Assist, inspire and empower youth (13-18 years old) to transition into adulthood and to develop into future leaders.
- **Guys Give Fund** – Alleviate Domestic Violence

UNITED WAY RUN PROGRAMS

- **2-1-1 Referral Hotline** - Answering more than 8,500 calls for information and referrals.
- **Center for Nonprofit Excellence** – Strengthening the capacity of nonprofits across New Mexico.
- **Donor Choice Administration** - Working with 6,000+ nonprofits monthly to transfer over \$11 million in donors' designated gifts.
- **Family Advocacy Center** – Providing a single location for victims of domestic violence to change their futures.
- **Tax Help NM** - returning millions of dollars to low-income families.

CORNERSTONE PARTNERS

Leadership in development and execution of strategies for systemic change and resource focus to deliver measurable impact for donors' giving and community efforts:

- Innovation
- Research & Development
- Connectivity - Convening, Collaborating
- Alignment – common data, measures, goals and strategies
- 400+ workplace campaigns and the donations of more than 33,000 donors

"I really value what UWCNM stands for and does for our community, my company, and myself personally. There are many services provided by our United Way that benefit the community, but the Cornerstone program is one of the most important to me. By covering the overhead costs of the local chapter it allows all other charitable giving by the donors to go 100% to the organization of their choice. It's a big deal to people, and a strong incentive to give, when they know every penny they donate is going to the cause of their choice. New Mexicans have many things to be proud of and thankful for, and I believe that the excellent services and work provided by the UWCNM is at the top of the list."
– Bill Lemon

WHY SHOULD YOU INVEST IN THE WORK OF YOUR UNITED WAY?

- Your donation is combined with the donations of many, creating a deep resource pool that ensures a robust network of health and human services, addressing the basic and more complex needs of individuals in our community.
- You can reach farther and deeper by supporting a range of services that support our most vulnerable neighbors.
- UWCNM does the due diligence for you to ensure your dollars are spent wisely by the nonprofits receiving grants. All funded programs have agreed to common goals and are required to report as well as measure their effectiveness toward these goals.
- You support programs that are important, however more challenging to fund through other means.
- You inspire others by supporting the solutions our community needs, for a variety of issues.
- You can be part of the process of distributing these dollars by joining a Community Solutions panel.

Donor Designated Concierge Service

Whatever matters to you, we can make it easier for you to get your money where you think it will do the most good. We can also connect you with others who have the commitment you have. Once you have fulfilled the required \$1,000 minimum gift to support the work of your United Way you may designate any amount to any 501(c)(3) nonprofit of your choosing.



The fleur-de-lis is the symbol of the Society.

PERSONAL PHILANTHROPY ACCOUNT

You may designate part of your gift to your Personal Philanthropy Account and contact staff at a later time to allocate your funds. Any funds that you do not designate at the time you contribute will automatically be deposited into this account for your later distribution.

Funds can be designated at any time by calling, writing or emailing us, until the end of the campaign cycle. Thus, contributions put into your Personal Philanthropy Account during the 2018 campaign will be available for distribution until June 2020.

Any tax event occurs at the time of your payment to UWCNM. Thus the donation would be recorded for tax purposes for the calendar year we receive your payment even if you were not disbursing to your designated 501(c)(3)s until 2020.

Many members find this option a great convenience. There is no limit to the number of requests for allocations that you may make through the course of the year. There is a minimum amount of \$50 to any one designation.

Requests will be processed as quickly as possible and sent to the designated 501(c)(3) within two weeks of the receipt of the request.

You will receive an annual statement of your Personal Philanthropy Account activity which will help you keep track of your giving and keep your records complete and organized.



The Virtue of Faith Conquers All
Tocqueville coat of arms

“While we have a few old favorite non-profits that we regularly donate to through United Way, we like to give most of our contribution to the United Way of Central New Mexico’s Community Fund. I don’t have the time or expertise to evaluate all the potential agencies, and I know by doing so, our money goes where it can do the most good.” – David & Susan Weymouth

DIRECTED GIVING: THE NONPROFIT AGENCY(S) OF YOUR CHOICE

You may choose to give a portion of your gift to any 501(c)(3) nonprofit agency after you have full-filled the requirement of investing a minimum of \$1,000 or more in the work of United Way of Central New Mexico

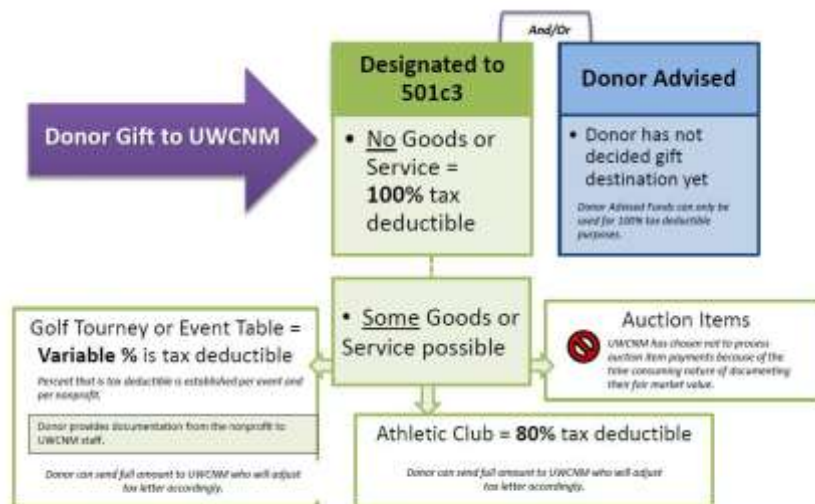
United Way of Central New Mexico strives to make your giving as easy as possible and allows you to consolidate giving to such 501(c)(3)'s as:

- ✿ Any IRS verified 501(c)(3) that you care about
- ✿ Alumni associations
- ✿ Schools
- ✿ Religious organizations - churches, synagogues, mosques
- ✿ Arts organizations

We recognize your passions and work to support you in your giving. Your relationship with the charities you support will be the same as if you made a direct gift to them.

The amount of your tax deduction for your gift will be adjusted for the value of any goods or services received in return for amounts you designate to recipients of your Tocqueville Society giving.

DESIGNATIONS FOR WHICH YOU RECEIVE GOODS OR SERVICES



These policies are driven by IRS rules and regulations. We have endeavored to be as user friendly as the rules permit. If you need additional information please contact our Tocqueville Society staff at 247-3671.

Payment methods

The flexibility to meet your needs

- ❖ You can send a **CHECK** or charge your **CREDIT CARD*** whenever you would like a designation payment made. **There is a minimum required gift of 3% to our Cornerstone Program when using a credit card.*
- ❖ You can have your credit card charged on either the 11th or 24th of each month for **REGULAR PAYMENTS**.
- ❖ You can be **BILLED** quarterly or reminded annually for payments.
- ❖ You can transfer **STOCK** (Please see following section on stocks).
- ❖ You can pay via **PAYROLL DEDUCTION** (Please see your HR department to set this up).
- ❖ Any monies not designated will remain in your **Personal Philanthropy Account** until you have allocated your funds up to 18 months at which time any remaining balance will be transferred to our Community Fund.

STOCK DONATIONS

Benefits of giving through stock include the possibility of bypassing capital gains while deducting the stock's value as a charitable deduction. For instance, you might have purchased stock in 1985 for \$2,000. The fair market value of that stock today might be \$10,000, resulting in an \$8,000 capital gain that could mean as much as \$1,600 in tax. Consider the following chart:

	Give stock	Give \$10,000 in cash	Sell stock and give as cash
Gift value	\$10,000	\$10,000	\$10,000
Ordinary income tax savings*	\$3,960	\$3,960	\$3,960
Capital Gains Tax (saved or paid)	\$1,600 saved	0	\$1,600 paid
Net Tax Savings	\$5,560	\$3,960	\$2,360

**Our example illustrates the potential value of a stock gift and highlights some of the maximum available benefits. These benefits depend on a number of things, such as how long you have owned the stock and your tax bracket. We strongly urge you to contact your tax advisor to determine the exact income tax consequences of your donation.*

STOCK REFERENCE & ROUTING NUMBERS

Your broker will appreciate the following information:
Our account is with Morgan Stanley, DTC #: 015
Our account number is 234030620

Please contact us if you have any additional questions or when you have made a transfer.

Information for Making Designations and Payout Procedures

DESIGNATIONS

- Designations to any 501(c)(3) nonprofit agency or organization can be made at any time.
- If you wish to designate your pledge upfront we will pay them in their entirety when we receive your full payment or as a percentage as we receive your payments throughout the year.
- If you wish to designate throughout the year, payments will be held in your Personal Philanthropy Account and payouts will be made as directed. We will hold your payments for up to 18 months at which time any remaining funds will be transferred to our Community Fund.
- To request a designation, please forward in writing via e-mail, fax or letter to Evita Sinclair (Evita.Sinclair@uwcnm.org, fax: 242-3576). If you are designating to a new agency or an out-of-town agency please also provide the address and any further instructions as necessary.
- We will adjust your tax deductible amount for any donation in which you receive goods or services. Payments have to be made at the same time as we receive your designation, we cannot pay a gift for which you receive goods or services via your personal philanthropy account donor advised fund.

PAYOUTS

- A “payout” is defined as the act of UWCNM sending your funds to the charity you designate.
- We pay out designations twice a month (approximately the 5th and the 20th). In order to meet these dates, we must receive your designation request and payment no later than five working days prior to payout. During the month of December, payouts are made weekly before the holiday to accommodate all your end of year giving. However, our last payout of the year is December 18th and any payments received between December 19th and December 31st will be receipted in the 2018 calendar year but the payments to designated agencies will not be sent until January 2019.
- Payments are made to agencies via automated clearing house payments (direct bank account to bank account). Each agency is notified of each deposit and can log onto our website to receive your acknowledgment information (unless you have requested to remain anonymous). New agencies will still be remitted via paper check.
- You should receive an acknowledgment of each gift directly from your designated agencies. Your relationship with the charities you support will be the same as if you made a direct gift to them.

PAYROLL DEDUCTIONS

- We payout a percentage of your donation each month to your designated agencies as we receive your withholdings from your company
- You may also select to keep your donation in your Personal Philanthropy Account. As your funds arrive from your company we will hold them in your account for future distribution.

If you have any questions regarding an agency’s 501(c)(3) status, your payment, or designations please feel free to call Evita Sinclair, Tocqueville Society Donor Relations Officer, at (505) 245-1750, or e-mail Evita.Sinclair@uwcnm.org.



United Way of Central New Mexico
Tocqueville Society
Designation Payout Schedule



<i>*Designation Deadline</i>	<i>Donations Remitted**</i>
January 11, 2018	January 19, 2018
January 30, 2018	February 2, 2018
February 14, 2018	February 21, 2018
February 28, 2018	March 5, 2018
March 14, 2018	March 20, 2018
March 30, 2018	April 4, 2018
April 13, 2018	April 18, 2018
April 30, 2018	May 4, 2018
May 15, 2018	May 18, 2018
May 30, 2018	June 5, 2018
June 15, 2018	June 22, 2018
June 26, 2018	June 29, 2018
July 13, 2018	July 18, 2018
July 30, 2018	August 3, 2018
August 10, 2018	August 17, 2018
August 30, 2018	September 6, 2018
September 14, 2018	September 19, 2018
September 28, 2018	October 4, 2018
October 12, 2018	October 18, 2018
October 30, 2018	November 5, 2018
November 13, 2018	November 19, 2018
December 3, 2018	December 7, 2018
December 12, 2018	December 17, 2018
December 19, 2018	December 26, 2018

Any payments received between December 19th and December 31st will be receipted in the 2018 calendar year but the payments to designated agencies will not be sent until January 2019.

**Designation deadline is 12 Noon*

***Checks completed by 3 pm*

Please call or e-mail Evita Sinclair with your designation instructions or question at Evita.Sinclair@uwcnm.org or (505) 245-1750.

DonorLink

Online Account Access

We are proud to offer you online access to your account 24/7 via **DonorLink**. You can log onto www.uwcnm.org/donorlink to view your account. Please contact Evita Sinclair at Evita.Sinclair@uwcnm.org or (505) 245-1750 to obtain your access name and password.

In addition, you will receive a tax letter in January for your donations with a statement detailing your donations.



Donor Gift Information

Pledge and Payment Information

Click on "+" to view pledge payments

Year	Program	Date	Transaction Type	Amount																								
2018	United Way	1/19/2017	Actual Payroll Deduction Pledge	\$11,000.00																								
<table border="1"> <thead> <tr> <th>Date</th> <th>Transaction Type</th> <th>Payment Amount</th> </tr> </thead> <tbody> <tr> <td>2/6/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$769.24</td> </tr> <tr> <td>3/6/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$769.24</td> </tr> <tr> <td>4/10/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$961.55</td> </tr> <tr> <td>5/8/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$769.24</td> </tr> <tr> <td>6/14/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$769.24</td> </tr> <tr> <td>7/6/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$961.55</td> </tr> <tr> <td>8/23/2017</td> <td>Actual Payroll Deduction Payment / Check</td> <td>\$769.24</td> </tr> </tbody> </table>					Date	Transaction Type	Payment Amount	2/6/2017	Actual Payroll Deduction Payment / Check	\$769.24	3/6/2017	Actual Payroll Deduction Payment / Check	\$769.24	4/10/2017	Actual Payroll Deduction Payment / Check	\$961.55	5/8/2017	Actual Payroll Deduction Payment / Check	\$769.24	6/14/2017	Actual Payroll Deduction Payment / Check	\$769.24	7/6/2017	Actual Payroll Deduction Payment / Check	\$961.55	8/23/2017	Actual Payroll Deduction Payment / Check	\$769.24
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8/23/2017	Actual Payroll Deduction Payment / Check	\$769.24																										
2015	United Way	12/4/2015	Actual Payroll Deduction Pledge	\$10,000.00																								
2014	United Way	1/30/2015	Payroll Deduction Pledge *	\$10,000.00																								

Gifts to United Way Funds

Year	Program	Date	Amount	Agency
2015	United Way	1/19/2017	\$4,500.00	United Way of Central New Mexico Community Fund
2015	United Way	1/19/2017	\$500.00	UWCBM Young Leaders Society Initiative Fund
2015	United Way	12/4/2015	\$4,500.00	United Way of Central New Mexico Community Fund
2015	United Way	12/4/2015	\$500.00	UWCBM Young Leaders Society Initiative Fund
2014	United Way	1/30/2015	\$4,500.00	United Way of Central New Mexico Community Fund
2014	United Way	1/30/2015	\$500.00	UWCBM Young Leaders Society Initiative Fund

Payout Information to Agencies



Year	Program	Date	Amount	Agency
2016	United Way	9/1/2017	\$38.46	Albuquerque Academy Financial Aid
2016	United Way	9/1/2017	\$38.46	Albuquerque Community Foundation Future Fund
2016	United Way	9/1/2017	\$79.92	Manzano Day School
2016	United Way	9/1/2017	\$153.85	Prince of Peace Catholic Community
2016	United Way	9/1/2017	\$38.46	CBMCC Donna & Jelli Rust Opportunity Assistance Fund
2016	United Way	9/1/2017	\$38.46	Saint John's University
2016	United Way	7/18/2017	\$48.98	Albuquerque Academy Financial Aid
2016	United Way	7/18/2017	\$48.98	Albuquerque Community Foundation Future Fund
2016	United Way	7/18/2017	\$96.16	Manzano Day School
2016	United Way	7/18/2017	\$192.31	Prince of Peace Catholic Community

1 2 3 4 5 6 7 8 9 10 ...

Annual Giving Statement

No more need to collect receipts for all your nonprofit donations! Along with your tax letter we send in January, you will also receive a detailed statement of your account showing all of your donations, both designated and undesignated.

If you prefer we can also send you a copy of your current statement on a quarterly basis, just let us know.

	<p>United Way of Central New Mexico</p> <p><i>Alexis de Tocqueville Society</i></p> <p>Personal Philanthropy Account Activity Statement</p>			
<p>The Alexis de Tocquevilles 1234 Anywhere Avenue Albuquerque, NM 87101</p>		<p>9/01/2017 Account ID #:11111 Page 1 of 1</p>		
<p>Account Detail -- Campaign Year 2017 (Payable through 12/31/2018)</p>				
<p>Total Pledge Amount: \$10,000.00</p>				
<p>Payments made to United Way:</p>				
08/01/2017	Full Paid/Visa	\$10,000.00		
<i>Total:</i>		\$10,000.00		
<p>Amount Paid to United Way of Central New Mexico Programs:</p>				
08/01/2017	United Way of Central New Mexico Community Fund	\$2,500.00		
08/01/2017	UWCNM Corporate Cornerstone Program	\$1,000.00		
<i>Total:</i>		\$3,500.00		
<p>Amount Paid to Designated Agencies:</p>				
8/2/2017	Albuquerque Academy	\$500.00		
8/2/2017	National Dance Institute of New Mexico, Albuquerque Hiland Theater	\$2,500.00		
8/2/2017	New Mexico Foundation for Dental Health Research and Education	\$500.00		
8/2/2017	UNM Foundation #202242	\$600.00		
<i>Total:</i>		\$4,100.00		
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px 10px 2px 10px;">Amount remaining to be designated in your account:</td> <td style="text-align: right; padding: 2px 10px 2px 10px;">\$2,400.00</td> </tr> </table>			Amount remaining to be designated in your account:	\$2,400.00
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Events

The Society holds a number of events each year:

- ❖ Annual appreciation event. In June we thanked our Society donors with a reception on the rooftop of Hotel Chaco.
- ❖ A fall event to thank our Impact Investors group, donors giving \$2,500 and more to support the work of United Way of Central New Mexico.
- ❖ “Tocqueville Tuesdays”, a learning conversation series, featuring discussions about the impact your gifts to UWCNM are having in your community.

Thanks to our **CO-BRANDING** sponsors, these events are a benefit of your membership. They offer unique opportunities to connect with a like-minded assembly of Society leaders. They are also a great deal of fun.

You will receive invitations to these events as they are developed. We hope you will be able to join us, as the conversation and discussions that take place have energized Society members for over fifteen years.



Corporate Cornerstones & Event Co-Branding Sponsors

Corporate Cornerstone Partners help UWCNM bring people and resources together to measurably improve lives and strengthen our community.

A few Corporate Cornerstone companies make further contributions specifically to cover events and activities related to Major Gifts initiatives such as the Tocqueville Society. The generous co-branding sponsors for the Tocqueville Society are:



A special thank you to these companies for making above and beyond gifts that allow us to bring our donors together to not only say thank you but to educate and inform them on important issues as well as foster connections with those who share a passion for philanthropy.

Philanthropy is caring for others, others who you will never know. It is a true expression of one's compassion for humankind, which is why it feels so good to give." - Doug Brown

United Way of Central New Mexico's 2018 Corporate Cornerstone Companies



Vista Level (\$175,000 - \$274,999)

Presbyterian Health Plan
Sandia National Laboratories

Pinnacle Level (\$100,000 - \$174,999)

General Mills, Inc.
Lovelace Health System
PNM
Tocqueville Society Donors

Mesa Level (\$50,000 - \$99,999)

Alliance Data
Bank of Albuquerque
Bank of America Merrill Lynch
Blue Cross Blue Shield of NM
New Mexico Gas Company
US Bank
Wells Fargo

Valley Level (\$25,000 - \$49,999)

Comcast
Enterprise Holdings
Ethicon
FRENCH Funerals & Cremations
New Mexico Mutual
U.S. Eagle Federal Credit Union
UWCNM Guys Give

Bosque Level (\$10,000 - \$24,999)

Albertsons
Albuquerque Journal
Avila Retail Development and Management
BNSF Railway
Brycon Construction
CenturyLink
Crest Mechanical Systems, Inc.
JB Henderson Construction
John Moore Associates
Miller Bonded Inc.
Morgan Stanley
Pulakos CPAs, PC
Sandia Peak Ski & Tram Co.
Southwest Capital Bank
TransCore
UnitedHealth Group
UPS
Walmart Stores & Sam's Clubs of Central NM
Washington Federal.

Rio Grande Level (\$7,500 - \$9,999)

Bank of the West
Costco Wholesale
KPMG

Chaparral Level (\$5,000 - \$7,499)

Bradbury Stamm Construction
Chalmers Ford
CliftonLarsonAllen
CSL Plasma
Express Scripts, Inc.
Kirtland Federal Credit Union
HB Construction
HUB International
Klinger Constructors, LLC
Miller Stratvert P.A.
Mott's LLP, A Dr. Pepper Snapple Group Co.
Mountain States Mutual Casualty Company
New Mexico Bank & Trust
Nusenda Credit Union
NuStar Energy
REDW, LLC.
SUMCO Phoenix Corporation
Target
Trythall Advisory Group
Westwind Computer Products, Inc.

Partners in Philanthropy (up to \$4,999)

AAA New Mexico
Allstate Insurance Company
Border States Electric Supply
Burt & Company CPAs, LLC
Business Environments
Cardinal Health
Century Bank
C and S Wholesale Grocers, Inc.
Century Sign Builders
Dillard's – Cottonwood Mall
FedEx
First National 1870
The Hartman + Majewski Design Group
Holman's
Jack Stahl Co. LLC
Jaynes Corporation
Los Alamos National Bank
Macy's – Albuquerque
Main Bank
Nationwide Insurance
Nob Hill Development Corporation
SouthwestRe

As of 5/1/18

Recognition & Anonymity

Recognition is an important part of the United Way of Central New Mexico. We strive to thank you in a way that you appreciate and, if you desire, to recognize you publicly so that your leadership in giving may inspire others. One of the chief means of recognition is our annual Leaders in Giving publication, which is completely underwritten by Corporate Cornerstone dollars.

How you are recognized is completely up to you. You may choose to remain completely anonymous, or be anonymous in terms of United Way recognition but not to your designated agencies. We will work with you to create the kind of recognition that you desire. You may change your approach at any time.

The following are examples of how you may be recognized:

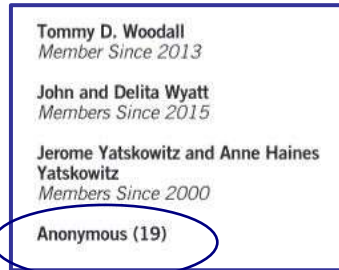
With a photo in the Tocqueville section of the Year in Review book



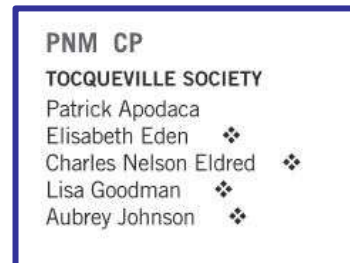
Without a photo in the Tocqueville section of the book



Anonymously in the Tocqueville section of the book



In lists of giving at your company, either publicly or anonymously



Photos are generally taken at events or at a professional photography studio in the spring, or you may provide your own.

Additional recognition is offered to those who are also members of our **Impact Investors** group, donors giving \$2,500 or more to directly support the work of your United Way.



Giving Levels

WITHIN THE SOCIETY THERE ARE SEVERAL GIVING LEVELS:

**La Table Ronde d'Un
Million de Dollars**
(*\$1,000,000 and above*)

Ordre de la Prospérité
(*\$750,000 to \$999,999 Annually*)

Ordre de la Connaissance
(*\$500,000 to \$749,999 Annually*)

Ordre de l'Indépendance
(*\$250,000 to \$499,999 Annually*)

Membre de la Société Nationale
(*\$100,000 to \$249,999 Annually*)

Ordre de la Fraternité
(*\$75,000 to \$99,999 Annually*)

Ordre de l'Égalité
(*\$50,000 to \$74,999 Annually*)

Ordre de la Liberté
(*\$25,000 to \$49,999 Annually*)

Ordre de la Noblesse
(*\$20,000 to \$24,999 Annually*)

Ordre Classique
(*\$15,000 to \$19,999 Annually*)

Membre de la Société
(*\$10,000 to \$14,999 Annually*)

**Step-Up Challenge Level:
Membre de Horizon**
(*\$5,000 to \$9,999 Annually*)*

** with the difference between your gift and \$10,000 to be designated to the Community Fund)*

Legacy Giving

We are pleased to offer the **TOCQUEVILLE LEGACY CIRCLE**... continuing your Tocqueville giving after your life...FOREVER! A \$250,000 Legacy Gift can create an Endowment Fund, which at a 4% distribution rate, will fund \$10,000 of annual support forever.

Your Legacy...Your Passion: Annual distributions can benefit what you care about... just like your annual gift.

Provide for the funding of your Tocqueville Legacy Endowment

- *After Your Lifetimes* with “Gifts Anyone Can Make” ...without impacting your lifestyles or family security...from what is left after your other goals are met
 - ✓ Bequest
 - ✓ Retirement Plan Beneficiary Designation
 - ✓ Life Insurance Beneficiary Designation
- *During Your Lifetimes* that will establish your Fund *After Your Lifetimes*. Choose from many cost effective alternatives, including:
 - ✓ Partner with UWCNM to share the cost of a Life Insurance Policy
 - We work with your life insurance advisor to identify a \$250K+ life insurance policy that meets criteria
 - Increase your annual gift for 5 years to fund 50% of the premiums
 - UWCNM Endowment matches your gifts and pays premiums for 5 years.
 - ✓ *Gifts That Pay You Income*: Charitable Gift Annuities can be used to:
 - Increase after tax cash flow from assets
 - Diversify assets
 - Produce a current tax savings
 - UWCNM can reinsure the annuity to get immediate cash to create your Fund!

Thank you

Providing the highest level in customer service to you is our goal. We do this to make the giving experience easier and more positive so that you may fully accomplish your philanthropic goals.

We are grateful for the opportunity to serve you, and if there is anything whatsoever that we may do to make your membership in the Tocqueville Society of United Way of Central New Mexico easier, more enjoyable or more meaningful, please do not hesitate to contact us. We value and appreciate your feedback, both on what we're doing well and what we could do better.

Thank you for your leadership in central New Mexico.



LIVE UNITED™



**United Way
of Central New Mexico**

www.uwcnm.org