



Tocqueville
Society
Member Handbook

2012

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

*Tocqueville
Society*








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.
-  Receive professional, personalized service in managing your account from our Tocqueville Society Donor Relations Specialist, Jane Karcz.

Receive invitations to no cost, learning and engagement events throughout the year featuring special guests at unique venues.

Be recognized for your giving in the United Way of Central New Mexico Leaders in Giving publication, the National United Way Tocqueville Leaders Book, 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 including Young Leaders Society, Women in Philanthropy, and Hispano Philanthropic Society:

-  Young Leaders: www.uwcnm.org/leadership/yls.html
-  Women in Philanthropy: www.uwcnm.org/leadership/wip.html
-  Hispano Philanthropic Society: www.uwcnm.org/leadership/hps.html

All of these benefits are offered to you free of charge thanks to the generosity of our Corporate Cornerstone Partners and Co-Branding Sponsors.

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 customers.

The society, created in 1972 by United Way Worldwide, was named for a 19th century French diplomat, Alexis de Tocqueville. He wrote with admiration about the unique spirit of volunteerism in America, a spirit that is 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 505 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, there have been distinctive individuals with the fortitude and perseverance to effect change. You are among them.

PHILANTHROPY: United Way of Central New Mexico welcomes the opportunity to unite individuals and institutions while being responsive to the 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.

Sincerely yours,



Melissa J. Dracup
Director | Tocqueville Society
United Way of Central New Mexico

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Corporate Cornerstones & Co-Branding Sponsors

One hundred percent of your individual contribution goes where you want it to. *100 percent.* This is made possible by a program created by United Way of Central New Mexico in 1998 in which corporations designate funds specifically to cover the low 12.7% administrative costs.

A few of these Corporate Cornerstone companies may 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:

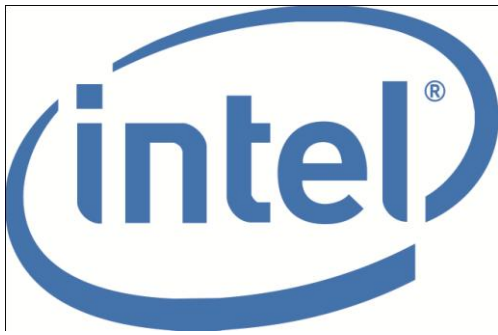


Corporate Cornerstone funds above the United Way's administrative costs support Community Building Initiatives, such as:

- The Center for Nonprofit Excellence www.centerfornonprofitexcellence.org
- The Albuquerque Family Advocacy Center for victims of Family Violence
- The Community Fund - More than 100 programs that reach those most vulnerable in our community

For further information, please see www.uwcnm.org.

United Way of Central New Mexico's 2011 Corporate Cornerstone Companies



Vertex Level (\$1,000,000 +)

Intel Corporation

Summit Level (\$275,000- \$999,999)

Opportunities available

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

Opportunities available

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

Pulakos CPAs, PC
REDW, *The Rogoff Firm*
Sandia Peak Ski & Tram Co.
Sprint
Sunrise Bank of Albuquerque
United Blood Services
UPS
Wal-Mart Distribution Center – Los Lunas



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

Ethicon Endo-Surgery
General Mills, Inc.
Lockheed Martin/Sandia
National Laboratories
Lovelace Health System
PNM
Presbyterian Health Plan
Wells Fargo

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

Cardinal Health Shared Service
First Community Bank, now
part of US Bank
Victoria's Secret Direct

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

Bank of Albuquerque
Bank of America
Big J Enterprises LLC
Enterprise Rent-A-Car
New Mexico Gas Company

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

Bank of the West
Bueno Foods
Chaparral Electric Company
Citi Cards
Comcast
Don Chalmers Ford
FRENCH *Funerals-Cremations*
GE Intelligent Platforms
Hewlett-Packard
JB Henderson Construction
JCPenney Companies
Klinger Constructors, LLC
Merrill Lynch
Miller Bonded Inc.
Miller Stratvert P.A.
Morgan Stanley Smith Barney
New Mexico Mutual

Rio Grande Level (\$5,000 - \$9,999)

:30 Street
Achievement Gallery
B & D Electric
BBVA Compass Bank
BlueCross BlueShield of New Mexico
Bradbury Stamm Construction
Brycon Construction
Century Bank
Clifton Gunderson LLP
Costco
Deloitte.
Delta Dental of New Mexico
Enterprise Builders Corporation
Excel Staffing Companies
Gerald A. Martin Ltd.
Heel
Heritage Home Healthcare and Hospice
HUB International Southwest Agency
Limited
Jaynes Corporation
Journal Publishing Company
Ktech Corporation
Mountain States Mutual Casualty
Company
MVD Express
National Heating & Ventilating Co. Inc.
New York Life Insurance Co.
Qwest
Southwest Productions
SouthwestRe
SUMCO USA
Summit Electric Supply
Target Corporation
TLC Plumbing & Utilities
TriCore Reference Laboratories
Wagner Equipment Co.

As of 3/1/11

Contact Information

JENNIFER MASTRIPOLITO

Chief Development Officer

Phone: (505) 247-3671, ext. 746; Cell: (505) 480-0779; Email: Jennifer.Mastripolito@uwcnm.org

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



MELISSA DRACUP

Director of the Tocqueville Society

Phone: (505) 247-3671, ext. 735; Cell: (505) 350-2561; Email: Melissa.Dracup@uwcnm.org

- Membership
- Your Philanthropic Goals
- Events



LARRY STRICKLAND

Director of Legacy Giving

Phone: (505) 247-3671, ext. 706; Cell: (505) 975-7556; Email: Larry.Strickland@uwcnm.org

- Your Philanthropic Goals
- Planned Giving



JANE KAR CZ

Tocqueville Society Donor Relations Specialist

Phone: (505) 247-3671, ext. 750; Cell: (505) 975-7463; Email: Jane.Karcz@uwcnm.org

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



MELISSA BARELA

Tocqueville Society Processing Specialist

Phone: (505) 247-3671, ext. 724; Email: Melissa.Barela@uwcnm.org

- DonorLink
- Your Contributions
 - Designations of the recipients you choose
 - Payouts to the recipients you designate



ALICE KEATOR

Major Gifts Administrative Assistant

Phone: (505) 247-3671, ext. 764; Email: Alice.Keator@uwcnm.org

- Contact information changes
- Events



GENERAL INFORMATION

A large amount of current information is available at www.uwcnm.org and/or www.uwcnm.org/get_involved/tocqueville.html. 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

2011 Tocqueville New Membership Committee

CHAIR

Meryl Manning Segel
Scott Patrick Homes

VICE-CHAIRS

Dr. Breda Bova
University of New Mexico

Kevin Lorenzen
AFLAC

Michelle A. Coons
Bank of the West

Erika Rimson
Community Volunteer

Greg Levenson
Bank of Las Vegas

Marla Wood
Community Volunteer

Shana Levenson
Community Volunteer

2011 Tocqueville Stewardship Committee

CO-CHAIRS

Cindy McGill
Presbyterian Healthcare Services

Curt McGill
Ricci & Co. LLC

VICE-CHAIRS

Jason Deshayes
Robert F. Butler CPA, PC

Sherman McCorkle
*Sandia Science and Technology Park
Development Corporation*

Jim Eaton
Business Acquisitions, LLC

Beverly A. McMillan
Victoria's Secret Direct

Margaret Eaton
Presbyterian Healthcare Services

Kristy Ott-Meyer
Presbyterian Healthcare Services

Cynthia Edwards
PNM Resources

Dick Teater
Big J Enterprises LLC

Michael Hauger
Wells Fargo Advisors

Duane Trythall
Excel Staffing Companies

LaDonna Hopkins
Community Volunteer

Barbara Trythall
Community Volunteer

Thomas J. Horan
Thomas J. Horan, Ltd.

Anita A. Kelly
Clifton Gunderson LLP

Events

The Society holds a number of events each year. In the past these events have included:

- ✦ A combined event in the fall is open to members and those considering membership. In 2011 we had an exclusive balloon glow in September at the Anderson-Abruzzo International Balloon Museum.
- ✦ An event in February for members only. This year over one hundred and thirty members attended our thank you and new member reception at the Albuquerque Museum.
- ✦ A summer event combines members and prospects. This year we hosted donors at the home of members Greg and Shana Levenson for a summer solstice dinner.
- ✦ Ongoing events include “Tocqueville Tuesdays,” which feature topics of broad interest presented by speakers from the community.

Thanks to our **CO-BRANDING** sponsors, these events are a benefit of your membership in the group. 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 a decade.



Giving options: The choice is yours

Donors give because they believe they can make a difference by giving - and they do - a big difference. At United Way of Central New Mexico we grow passion - the kind of passion that builds a better community by focusing on what really matters. We nurture, gather, focus, and disperse passion in order to improve this community for all of us. United Way is the way a community helps itself.

You can help, and you want to help. There are many others who feel as you do. 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 are as committed as you are.

COMMUNITY FUND



You want to maximize the impact of your gift. You can do that by combining your gift with the gifts of other local donors. In this united way, you help provide significant grants to a local network of quality, result-based, critical services. These include services to those who are hungry or homeless; adults or children who are being abused; others struggling with addiction, disability, or illness.






By giving to the Community Fund, you also provide system-wide improvement efforts in local human services. The Albuquerque Family Advocacy Center is one example of system improvement. United Way partnered with the City of Albuquerque to bring 13 partner agencies under one roof to better serve victims of violence. In the first 16 months they served more than 8,700 victims – double or triple the number of victims served before.

The Community Fund helps those most vulnerable in Bernalillo, Sandoval, Torrance, and Valencia Counties.

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

You may choose to give a portion of your gift or your entire gift to any 501(c)3 nonprofit agency. Because of the Corporate Cornerstone program, 100% of what you give will go to that charity.

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 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 make a direct gift to them.

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

Your Personal Philanthropy Account

You may designate part or all 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 placed 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 (generally late February). Thus, contributions put into your Personal Philanthropy Account during the 2010 campaign will be available for distribution until February 2012.

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)3s until 2012.

Many members find this option to be a great convenience. There is no limit to the number of requests for allocations that you may make through the course of the year and there is no minimum amount.

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

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









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



The Virtue of Faith Conquers All:
Tocqueville coat of arms

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.
-  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.

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.
- To request a designation, please forward in writing via e-mail, fax or letter to Jane Karcz (jane.karcz@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.

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).
- We will provide your name and address (if you are not anonymous) to each agency with each payment they receive on your behalf. You should receive an acknowledgement of each gift directly from your designated agencies. Your relationship with the charities you support will be the same as if you make a direct gift to them.

PAYROLL DEDUCTIONS

- We payout 8.33% (1/12th) of your donation each month to your designated agencies via automated clearing house payments (direct bank account to bank account). Each agency is notified monthly of the deposit and can log onto our website to receive your acknowledgement information.
- You may also select to keep your donation in your Personal Philanthropy Account and 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 Jane Karcz, Tocqueville Society Donor Relations Specialist, at (505) 247-3671, ext 750, or e-mail jane.karcz@uwcnm.org.



United Way of Central New Mexico
Tocqueville Society
Designation Payout Schedule



<i>*Designation Deadline</i>	<i>**Checks Mailed</i>
January 13, 2012	January 17, 2012
January 30, 2012	February 2, 2012
February 13, 2012	February 16, 2012
February 28, 2012	March 2, 2012
March 13, 2012	March 16, 2012
March 30, 2012	April 4, 2012
April 13, 2012	April 18, 2012
April 30, 2012	May 3, 2012
May 14, 2012	May 17, 2012
May 31, 2012	June 3, 2012
June 14, 2012	June 18, 2012
June 28, 2012	July 3, 2012
July 13, 2012	July 18, 2012
July 30, 2012	August 2, 2012
August 13, 2012	August 16, 2012
August 29, 2012	September 5, 2012
September 12, 2012	September 17, 2012
September 28, 2012	October 3, 2012
October 12, 2012	October 17, 2012
October 30, 2012	November 2, 2012
November 16, 2012	November 21, 2012
December 3, 2012	December 6, 2012
December 10, 2012	December 13, 2012
December 17, 2012	December 20, 2012

***Any payments received between December 17th and December 31st will be receipted in the 2012 calendar year but the payments to designated agencies will not be sent until January 2013*

**Designation deadline is 12 Noon*

***Checks completed by 3 pm*



Please call or e-mail Jane Karcz with your designation instructions or question at Jane.Karcz@uwcnm.org or 505-247-3671, extension 750.

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 Jane Karcz at jane.karcz@uwcnm.org or (505) 247-3671 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.


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Admin ▶

THANK YOU FOR
INSPIRING
HOPE

AND CREATING
OPPORTUNITIES
FOR A BETTER
TOMORROW

GIVE. ADVOCATE.
VOLUNTEER.

LIVE UNITED



Donor Gift Information

Pledge and Payment Information

Click on "+" to view pledge payments

Year	Program	Date	Transaction Type	Amount
2009	United Way	1/26/2010	Bill Direct Pledge	\$15,000.00
+ 2008	United Way	12/8/2009	Bill Direct Pledge	\$3,000.00
+ 2008	United Way	1/27/2009	Bill Direct Pledge	\$12,000.00
		Date	Transaction Type	Payment Amount
		12/8/2009	Bill Direct Payment / Visa	\$12,000.00
+ 2007	United Way	12/10/2008	Bill Direct Pledge	\$1,000.00
+ 2007	United Way	3/5/2008	Bill Direct Pledge	\$10,000.00

* Payroll Deduction Pledge payments are made by your employer; therefore, detail will not be listed.

Gifts to United Way Funds




Year	Program	Date	Amount	Agency
2008	United Way	1/27/2009	\$1,000.00	United Way of Central New Mexico Community Fund
2007	United Way	12/10/2008	\$1,000.00	United Way of Central New Mexico Community Fund

Payout Information to Agencies

Year	Program	Date	Amount	Agency
2008	United Way	12/14/2009	\$1,000.00	UNM College of Fine Arts Deans Circle Fund
2008	United Way	12/14/2009	\$500.00	Feed the Children, Inc.
2008	United Way	12/14/2009	\$500.00	UNM

Giving Vouchers

Electronic Giving Vouchers may be used to include with your remittance envelope to your charity or church.

Name <u>Your name personalized here</u> Address <u>your address</u> <u>your city, state, zip code</u>	 
We give through United Way of Central New Mexico <i>To the order of</i> <u>Your organization's name can be personalized here</u> \$ <u>100.00</u> <i>One hundred dollars</i>	
 <i>Alexis de Tocqueville Society</i> <small>For questions regarding my gift to you, please contact Melissa Dracup, Alexis de Tocqueville Society Donor Relations Officer with United Way of Central New Mexico at 505-247-3671 or melissa@uwcnm.org.</small>	
_____ Signature	<small>This coupon is not legal tender.</small>



This can be filled in electronically on our website and printed with your personal name and address in the upper left hand corner and then filled out like a check.

http://www.uwcnm.org/advocate/adt_coupon/index.php

Please note that filling this out online does not notify us of your intentions to give. Please also e-mail your requests to Jane Karcz at Jane.Karcz@uwcnm.org.

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.

	United Way of Central New Mexico <i>Alexis de Tocqueville Society</i> Personal Philanthropy Account Activity Statement	
The Alexis de Tocquevilles 1234 Anywhere Avenue Albuquerque, NM 87101		9/2/2010 Account ID #: 11111 Page 1 of 1
Account Detail -- Campaign Year 2010 (Payable through 12/31/2011)		
<hr/> Total Pledge Amount: \$11,500.00 <hr/>		
Payments made to United Way:		
3/26/10	\$4,500.00	
6/25/10	\$5,000.00	
8/6/10	\$2,000.00	
Total Payments: \$11,500.00 <hr/>		
Amount Paid to Designated Agencies:		
3/31/2010	\$3,000.00	United Way of Central New Mexico Community Fund
3/31/2010	\$500.00	American Cancer Society of NM
6/29/2010	\$1,000.00	Presbyterian Healthcare Foundation
6/29/2010	\$1,600.00	Children's Grief Center of NM
Total: \$5,400.00 <hr/>		
<div style="border: 1px solid black; padding: 2px; display: inline-block;"> Amount remaining to be designated in your account: \$6,100.00 </div>		

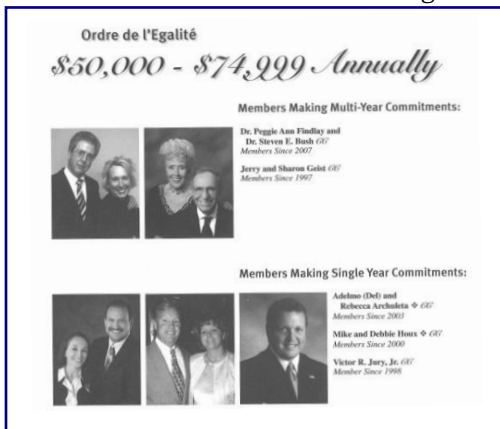
Recognition & Anonymity

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 book, 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 anytime.

The following are examples of how you may be recognized:

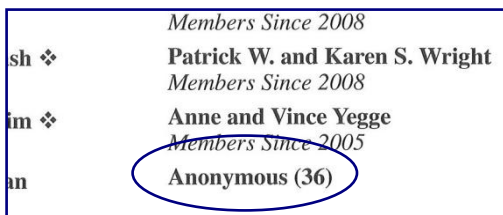
With a photo in the Tocqueville section of the Leaders in Giving book



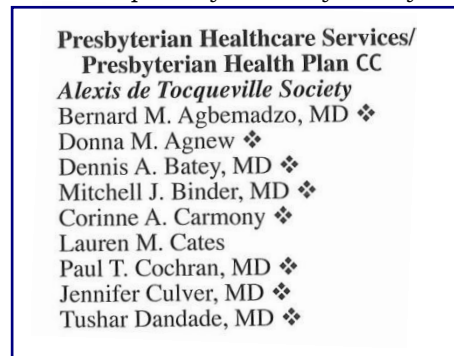
Without a photo in the Tocqueville section of the book



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 contribute some of or their entire gift to The Community Fund. In our Leaders in Giving book, we will print a “❖” next to your name or picture (if you are not anonymous) to show your support. If you made a planned gift, an “ℒ” will appear next to your name indicating you are a “Legacy” donor. In addition a “CC” will appear next to your name if you have achieved membership in our Loyalty Society, having given a cumulative gift of \$100,000.



According to our donor’s wishes, United Way of America provides additional member recognition in their Tocqueville Leaders Book. This publication also provides photo recognition for members who give at the \$100,000 level and above.

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’Egalité
(*\$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*)

Planned Giving

We are pleased to offer the **TOCQUEVILLE LEGACY CIRCLE...** continuing your Tocqueville giving after retirement... after your lives... FOREVER! With a \$200,000 legacy gift, at a 5% distribution rate, you will be supporting your annual \$10,000 gift forever.

You may also include United Way as a beneficiary of your IRA, and many more Planned Giving options. For more information, please contact Larry Strickland at Larry.Strickland@uwcnm.org or at (505) 247-3671, extension 367 or visit our website at http://www.uwcnm.org/give/planned_giving.html

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.



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