

UNITED WAY OF SAN ANTONIO AND BEXAR COUNTY TOCQUEVILLE SOCIETY

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Brad Barron

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Mary Rose Brown

NuStar Energy L.P.

Doug Cross

Lisa Friel

Jim Goudge

Tocqueville Event Co-Chair

Suzanne Goudge

Tocqueville Event Co-Chair

Phil Green

Frost Bank

Harvey Hartenstine

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Mike Howard

Howard Energy Partners

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Health Care Services

Rebecca Nathan

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Marty Truss

Dykema

Peggy Walker

Bank of America

John Zachry

Zachry Group

Message from the Planned Giving Committee Chair

Recently, I have been reflecting on the legacy of leadership that many past volunteers, chairs, and contributors of United Way have left behind. Our United Way was built by leaders who set out to create change for future generations. My relationship with United Way started long before I set foot in a board room or established my career. My father instilled the value of giving back to the community, specifically United Way, which has resulted in over 30 years of service as a volunteer. As I reflect on my support of United Way, I am reminded of how important philanthropic values were to my upbringing, as I am sure is the case for many of you.

We have been fortunate that our community support of United Way has remained solid, but as we have seen over the last year, the intensity of needs has increased along with the number of families who are now unable to meet basic needs. Annual giving is crucial to propelling the work of United Way's Impact Councils forward to ensure long-term stability, but we must also focus on leveraging other opportunities, including planned giving. As we support children, individuals, and families to reach their full potential by solving root-cause issues, we must diversify our philanthropic pursuits.

We are fortunate to have the \$3 million Endowment Match thanks to the Mackenzie Scott gift of \$20 million in 2020. Over the next year, our endowment and planned giving efforts will be a priority to guarantee that our work continues to grow through this enduring and stable source of income. Please let Kasi or me know if you are interested in learning more about planned giving opportunities. If you have already completed a legacy gift to United Way, please let us know so we can thank you. With the support of our Endowment and Planned Giving Committees, the \$3 million Endowment Match, and the legacy of leadership donors, we know that this effort will be a success!

- R. Rene Escobedo, Planned Giving Committee Chair



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