

Fall 2018 Donations and Directed Gifts Frequently Asked Questions



United Way of
the Capital Region

1. **Q. Is my United Way donation tax deductible?**

A. Yes, your charitable United Way donation is deductible in the year it is paid to United Way of the Capital Region.

2. **Q. What records should I keep regarding my United Way donation for tax purposes?**

A. Payroll deduction gifts: No receipts will be sent. Please keep a copy of your United Way pledge information, as well as your pay stub, W-2 or other employer documentation.

Direct Gifts: Receipts are automatically sent in January to all donors who contribute at least \$250 via cash, check or credit card for the preceding tax year. Please consult your tax advisor for more information.

3. **Q. Can I direct my United Way donation to another agency and are there any limitations?**

A. Yes, you can direct your gift to an active 501(c)3 non-profit organization that is compliant with the Patriot Act. (For more information, please see www.irs.gov or www.patriotact.com.)

4. **Q. What if the organization I designate does not meet the requirements above?**

A. United Way of the Capital Region makes numerous attempts to reach your designated agency. If the agency does not respond, United Way will contact you for new instructions. If we are unable to contact you, the monies will be directed to United Way's Community Impact Fund.

5. **Q. Are there any fees charged for directing gifts to another agency?**

A. For donations raised and distributed solely by United Way of the Capital Region your designated agency will receive 98.5 percent of your gift. See a list of our Cornerstone Partners who make this possible at <https://www.uwcr.org/give/corporate-champions/cornerstone-partners>.

For regional/national campaigns where United Way of the Capital Region is the distributor and the donor works outside of our solicitation area, a fee is calculated using the IRS form 990 as dictated by industry and United Way Worldwide standards. For the 2018 campaign, an administrative fee of 14.5 percent will apply to cover management and fundraising costs. Please see your campaign coordinator for campaigns where United Way of the Capital Region is **not** the distributor.

6. **Q. When will my agency be notified of and receive my directed gift?**

A. Agencies can view their donor and payout information at any time via our online portal, Agencylink, at: <https://agencylink.uwcr.org/agencylink/allLogin.aspx>.

United Way of the Capital Region processes payouts monthly based on pledge collections. Agencies will receive a payment when all collections on gifts directed to them reach or exceed \$100. Payouts for remaining collections, below this threshold, are made quarterly.