

Fall 2017 Donations and Designations

Frequently Asked Questions



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 designate my United Way donation to another agency and is there a minimum amount I can designate?**
 - A. Yes, you can designate your gift to another agency. Currently there is no minimum designation amount.

4. **Q. What organizations can I designate my United Way donation to?**
 - A. Agencies that are both an active 501(c)3 organization according to the IRS and compliant with the Patriot Act.

5. **Q. What if the organization I designate to does not meet the requirements above?**
 - A. United Way of the Capital Region makes numerous attempts to reach your designated agency. For any agency who does not respond, United Way will contact you for new instructions.

6. **Q. What fees are charged on my designation?**
 - A. **For donations raised and distributed solely by United Way of the Capital Region no fees are charged.** 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 2017 campaign, an administrative cost of 5.7 percent and a fundraising cost of 7.8 percent will apply to these donations. Please see your campaign coordinator for campaigns where United Way of the Capital Region is **not** the distributor.

7. **Q. When is my agency notified of my designation?**
 - A. Agencies can view their designation and payout information at any time via our online portal, Agencylink, at: <https://agencylink.uwcr.org/agencylink/allLogin.aspx>

8. **Q. When is my designation paid to the agency?**
 - A. Designations are paid based on actual pledge collections. The first payout of the new campaign is made in January for all designations that are fully paid as-of December 31 of the prior year. Then beginning in April, a payout is done every other month through October. United Way of the Capital Region must collect at least \$200 for a payment to be issued to a designated agency during this time frame (except for the August payout where the minimum to receive a payment drops to \$100). Additional campaign payouts are made in January and April of the following year for all designated dollars collected.

For more information on your charitable donation, please see www.irs.gov or www.patriotact.com.