

Section 7: Checklist for Agencies Submitting United Way Funding Request

ITEM #	ITEM	For Agency Use: Mark line w/ X if submitted	For UWLC Use: Date Received
The following items should be together in a packet:			
1	Agency's Organization Chart	_____	_____
2	Articles of Incorporation	_____	_____
3	Board Roster (Current & Dated)	_____	_____
4	Certified copy of the complete agency audit of all accounts and holdings for the last fiscal year conducted by a certified public accountant in conformity with the audit guide of the AICPA entitled "Audits of Voluntary Health and Welfare Organizations" (1 copy) If applicable, based on revenue.	_____	_____
	If audit not required (if your agency receives less than 500k annually) does agency secure an annual financial report from an accountant with full board review	Yes _____	_____
		No _____	_____
5.	Constitution and By-Laws (1 copy)	_____	_____
6	Directors & Officers Insurance Policy Number and Provider Company (Please fill-in on right)	Policy #: _____ Provider #: _____	_____
7	Internal Revenue Service Report #990 "Report of Organizations Exempt from Income Tax" for the previous fiscal year. OR 990-EZ (1 copy) whichever applicable. or 990-N Postcard for organization w/ \$50,000 or less	_____	_____
8	Letter of determination of tax-exempt status under Section 501 (C) (3) of the internal Revenue Code (1 copy).	_____	_____
9	Program Materials [brochures, handouts, etc.] (1 copy per program if applicable)	_____	_____
10	Current Registration: State of TN, Department of State Registration to Solicit Funds for Charitable Purposes or exemption from permit. (1copy)	_____	_____

NOTE: Application will not be accepted without the highlighted items (#'s 3,4,7,8 & 10)

The deadline for submitting your United Way of Loudon County funding request is:

Friday, February 17, 2023 by 5 PM