



DECLARATION OF STATUS

Financial Disclosure Requirements

All applying organizations must submit an approved form of a Financial Review. Please refer to the form titled *Eligibility Requirements*.

New Partner Status

New Partner Status requires that your organization receives no more than \$5,000.00 in your first fiscal year.

Grantee Status

(Previously known as Venture/Program Status)

Grantee Status requires that organizations/programs/initiatives can only request up to \$10,000.00. All United Way funds under the Grantee Status must be used for direct services or program expenses. Funding is granted on a one-time basis with no commitment for continued support. Each year the Income Statement, Year End Balance Sheet, and receipts for how monies were spent are required.

Should the organization be required by its National Organization, Board, etc. to have a comprehensive service by an independent CPA with greater scope than otherwise required by the United Way, that audit, review or independently compiled financial statement will be included with the income statement and balance sheet.

Partner Status

(Previously known as Agency Status)

Partner Status allows that all United Way funding must go to direct services, program expenses, and/or projects. No administration or maintenance expenses are allowed with United Way dollars. The Income Statement, the Year End Balance Sheet, and IRS Form 990 are required. Should the organization be required by its National Organization, Board, etc. to have a comprehensive service by an independent CPA with greater scope than otherwise required by the United Way, that audit, review or independently compiled financial statement will be included with the income statement and balance sheet.

Please sign and date below

Agency Name: _____

Circle One

New Partner

Grantee

Partner

Agency Executive Director/CEO Signature: _____

Date: _____