

# 2025 - 2026 North Port & Non-profits United (NP2) Program Application

|                      |                        |
|----------------------|------------------------|
| Submitted on         | 14 August 2025, 4:42pm |
| Receipt number       | 15                     |
| Related form version | 3                      |

|              |                                     |
|--------------|-------------------------------------|
| Agency Name: | United Way of South Sarasota County |
|--------------|-------------------------------------|

|                |           |
|----------------|-----------|
| Tax ID Number: | 591100846 |
|----------------|-----------|

|                 |           |
|-----------------|-----------|
| Agency Website: | uwssc.org |
|-----------------|-----------|

|                        |                    |
|------------------------|--------------------|
| Agency Street Address: | 4242 S Tamiami Trl |
|------------------------|--------------------|

|             |  |
|-------------|--|
| Unit/Suite: |  |
|-------------|--|

|       |        |
|-------|--------|
| City: | Venice |
|-------|--------|

|        |    |
|--------|----|
| State: | FL |
|--------|----|

|                                      |          |
|--------------------------------------|----------|
| What county will your program serve? | Sarasota |
|--------------------------------------|----------|

|                                    |            |
|------------------------------------|------------|
| What city will your program serve: | North Port |
|------------------------------------|------------|

## Application Contact Information

|         |     |
|---------|-----|
| Prefix: | Ms. |
|---------|-----|

|             |     |
|-------------|-----|
| First Name: | Pia |
|-------------|-----|

|            |              |
|------------|--------------|
| Last Name: | Seebach-York |
|------------|--------------|

|            |               |
|------------|---------------|
| Job Title: | Grant Manager |
|------------|---------------|

|               |              |
|---------------|--------------|
| Phone Number: | 505 409 8241 |
|---------------|--------------|

|                |                         |
|----------------|-------------------------|
| Email Address: | pseebach-york@uwssc.org |
|----------------|-------------------------|

## Requested Mission Support Item Information

|                                   |  |
|-----------------------------------|--|
| What is your non-profits mission? | United Way of South Sarasota County's mission is to unite communities and resources to empower people and create positive sustainable change in the impact areas of education, self-sufficiency/economic mobility, health & wellness, and disaster recovery. |
|-----------------------------------|--|

|  |  |
|--|--|
| <b>Title of Project:</b>   | Volunteer Income Tax Assistance Program (VITA)   |
| <b>Amount Requested:</b>   | \$1,987.96   |
| <b>Please describe the item needed:</b>  | Two (2) laptops, plus two (2) key board/mouse combos at \$948.99/ea. and \$44.99/ea., respectively - to be used for tax preparation and filing by trained and IRS-certified volunteers in the City of North Port.  |
| <b>Are there any known or anticipated barriers to installing or using this item at your agency (e.g., space limitations, permitting requirements, or code compliance)?</b> | No.  |
| <b>In detail, how will this item assist the North Port community?</b>  | Each laptop used for VITA is used to complete approximately 50 individual income tax returns for low-income taxpayers, generating an average refund of \$1,004 per North Port household annually. UWSSC's VITA program is operated at four different locations in Sarasota County, but this request focuses solely on the North Port location.   |
| <b>Please describe the expected impact:</b>  | United Way of South Sarasota County's Volunteer Income Tax Assistance (VITA) program provides free tax return preparation for low-income households, ensuring they receive all eligible deductions and credits—especially the Earned Income Tax Credit (EITC), which can reach up to \$8,046 annually. Recognized as the most effective tool for lifting children out of poverty, the EITC often represents the largest single cash influx for ALICE (Asset Limited, Income Constrained, Employed) families. During the 2025 tax season, United Way of South Sarasota County's North Port VITA site prepared 429 federal returns, putting \$430,891 back into the pockets of those who need it the most. The average refund per North Port household was \$1,004 - nearly \$200 above the average of our four VITA sites. North Port generated the highest EITC amount (\$109,086, 48% of total production) and the highest Child Tax Credit (\$102,647, 42% of total production), reflecting a higher percentage of families with children at the North Port site. In addition to substantial refunds, VITA's free services save clients \$242 per return in commercial preparation fees, bringing the average total benefit per North Port household to \$1,246. Unfortunately, demand exceeded capacity, with over 100 taxpayers turned away. By adding two laptops, each capable of producing approximately 50 returns per season, North Port could serve 100 more households annually. Based on the 2025 averages, these laptops would generate: Refunds: $\$1,004 \times 100 = \$100,400$ ; Preparation savings: $\$242 \times 100 = \$24,200$ ; Total client benefit: $\$1,246 \times 100 = \$124,600$ ; COST: Laptops: $\$948.99 \times 2 = \$1,897.98$ ; Keyboard/mouse combos: $\$44.99 \times 2 = \$89.98$ ; Total investment: \$1,987.96. This investment will produce an estimated \$124,600 in direct economic benefit each year, flowing back into North Port's community and strengthening financial stability for working families. |
| <b>Please describe what data or statistics will be utilized to measure the impact:</b>   | The TaxSlayer software system provides data on individual tax returns, such as income, credits and deductions, and total refunds. Demographic data are collected using a Customer Survey (age, race/ethnicity, income amount and sources, healthcare, and other items related to each household's individual circumstances.  |
| <b>Is your impact reliant on a partnership with an external agency?</b>  | Services to the North Port community are operated in partnership with the City of North Port Social Services Division, which provides free space usage for UWSSC's delivery of VITA program services in North Port.  |

## Strategic Pillars

Under what Strategic Pillar does your mission support item

By generating refunds and credits through the tax system, we are able to

most align with and why?

boost the income of ALICE families' income as they are struggling to make ends meet. From our Client Survey, we know that the majority of households use their refunds to pay bills, pay down debt, and/or take care of necessities - such as food, housing, utilities, clothing, school supplies, transportation, etc. - that they might otherwise have to go without. This takes some of the burden of ongoing financial challenges and worries off their shoulders and reduces anxiety and stress. The tangible results and satisfaction of being able to provide for their family's urgent needs contribute to a sense of its members' overall wellbeing, enhance their quality of life, and renew hope for the future.

Pillar 2: Quality of Life

## Uploads

|  |   |
|--|---|
| Articles of Incorporation                    | <a href="#">Articles of Incorporation.pdf</a>           |
| IRS 501(c)3 Non-profits Determination Letter | <a href="#">501 c 3 Ltr.pdf</a>                         |
| Most Recent IRS 990 Form                     | <a href="#">2024 990.pdf</a>                            |
| Example/Image/Link of Support Item           | <a href="#">Dell Laptop Quote.png</a>                   |
| Link   | <a href="https://www.dell.com">https://www.dell.com</a> |
| Signature                                    |   |



[Link to signature](#)

# NP2 Non-Profit Application Checklist

Review each application submitted by the non-profit agency to ensure completion of application and all required documentation.

Agency Name: United Way of South Sarasota County

Tax ID: 59-1100846 Requested Amount: \$1,987.96

Agency Street Address: 4242 S Tamiami Trail

City: Venice State: FL Zip Code: 34293

| Documents                                 | Complete  | Notes             |
|---|---|-------------------|
| Application                               | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO |                   |
| Articles of Incorporation                 | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO |                   |
| 501 (c) 3 Non-Profit Determination Letter | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO |                   |
| IRS 990 Form (if applicable)              | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO |                   |
| Sunbiz Information                        | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO |                   |
| Cost of Mission Support Item              | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | <u>\$1,987.96</u> |
| Reasonable Purpose                        | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO |                   |
| Notes<br><u>Laptop</u>                    |   |                   |

Reviewed By: C. Estrada Date: 8/18/25



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| What county will your program serve? | Sarasota |
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| What city will your program serve: | North Port |
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| First Name: | Pia |
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|            |              |
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| Last Name: | Seebach-York |
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| Job Title: | Grant Manager |
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most align with and why?

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Pillar 2: Quality of Life

## Uploads

|  |   |
|--|---|
| Articles of Incorporation                    | <a href="#">Articles of Incorporation.pdf</a>           |
| IRS 501(c)3 Non-profits Determination Letter | <a href="#">501 c 3 Ltr.pdf</a>                         |
| Most Recent IRS 990 Form                     | <a href="#">2024 990.pdf</a>                            |
| Example/Image/Link of Support Item           | <a href="#">Dell Laptop Quote.png</a>                   |
| Link   | <a href="https://www.dell.com">https://www.dell.com</a> |
| Signature                                    |   |



[Link to signature](#)

# State of Florida



## Department of State

I certify the attached is a true and correct copy of the Articles of Incorporation, as amended to date, of UNITED WAY OF SOUTH SARASOTA COUNTY, INC., a corporation organized under the laws of the State of Florida, as shown by the records of this office.

The document number of this corporation is 707395.

Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this the  
Fourth day of March, 2020



CR2E022 (01-11)

*Laurel M. Lee*

Laurel M. Lee

Secretary of State

**79**

RECEIVED  
JAN 11 1968  
FBI - WASH DC

## NAME \_\_\_\_\_

1964 3: 29  
SILE  
VOMODA

## PURPOSES

100

- ## ARTICLE III

7.01) The period of duration of the corporation is perpetual.



ARTICLE IV.

LOCATION OF CORPORATION

4.1) The initial post office address of the principal office of the corporation is 237 N. Tamiami Trail, Venice, Florida. The Board of Directors may from time to time move the principal office to any other address in Sarasota County, Florida.

ARTICLE V.

MEMBERSHIP

5.1) Every contributor to this corporation shall hereby become a member of the corporation and shall be entitled to vote at all meetings of the members and shall remain a member until the end of the ensuing calendar year. In addition, each member of the Board of Directors of the corporation shall automatically, upon his election, become a member of the corporation and shall remain a member of the corporation during his term of office. Each subscriber to these Articles of Incorporation shall be also a member of this corporation.

ARTICLE VI.

BOARD OF DIRECTORS

6.1) After the first election of Directors, the affairs of this corporation shall be directed by an elected Board of Directors consisting of no fewer than fifteen (15) or more than sixty (60) persons, the exact number, within such limitations, to be determined by the By-Laws of the corporation.

ARTICLE VII.

FIRST BOARD OF DIRECTORS

7.1) The first Board of Directors to serve until the first election of directors shall consist of five persons, whose names and addresses are:

- |                        |                                      |
|------------------------|--------------------------------------|
| 1) J. Howard Vaughn    | 189 W. Alba, Venice, Florida         |
| 2) Warren S. Henderson | Golden Beach Blvd., Venice, Florida  |
| 3) Harle L. Swift      | 425 Bay Shore Drive, Venice, Florida |
| 4) C. A. Keller        | 765 LaCuma Drive, Venice, Florida    |
| 5) A. Walter Johns     | 90 Poncele Drive, Venice, Florida    |

ARTICLE IV.

LOCATION OF CORPORATION

4.1) The initial post office address of the principal office of the corporation is 157 N. Tamiami Trail, Venice, Florida. The Board of Directors may from time to time move the principal office to any other address in Sarasota County, Florida.

ARTICLE V.

MEMBERSHIP

5.1) Every contributor to this corporation shall hereby become a member of the corporation and shall be entitled to vote at all meetings of the members and shall remain a member until the end of the ensuing calendar year. In addition, each member of the Board of Directors of the corporation shall automatically, upon his election, become a member of the corporation and shall remain a member of the corporation during his term of office. Each subscriber to these Articles of Incorporation shall be also a member of this corporation.

ARTICLE VI.

BOARD OF DIRECTORS

6.1) After the first election of Directors, the affairs of this corporation shall be directed by an elected Board of Directors consisting of no fewer than fifteen (15) or more than sixty (60) persons, the exact number, within such limitations, to be determined by the By-laws of the corporation.

ARTICLE VII.

FIRST BOARD OF DIRECTORS

7.1) The first Board of Directors to serve until the first election of directors shall consist of five persons, whose names and addresses are:

- |                        |                                      |
|------------------------|--------------------------------------|
| 1) J. Howard Vaughn    | 105 W. Alba, Venice, Florida         |
| 2) Warren S. Henderson | Golden Beach Blvd., Venice, Florida  |
| 3) Earle L. Swift      | 425 Bay Shore Drive, Venice, Florida |
| 4) C. A. Kellier       | 705 LaRosa Drive, Venice, Florida    |
| 5) A. Walter Johns     | 90 Fessle Drive, Venice, Florida     |



4.1) The officers of this corporation shall be elected by the Board of Directors of the corporation and shall be a president, first vice president, second vice president, secretary and treasurer.

4.2) The names of the officers who are to manage the affairs of the corporation until their successors are duly elected or appointed under these Articles are as follows:

- |                          |                   |
|--------------------------|-------------------|
| 1. President             | J. Howard Vaughn  |
| 2. First Vice President  | Wern S. Henderson |
| 3. Second Vice President | Baris I . . .     |
| 4. Secretary             | C. A. Kellor      |
| 5. Treasurer             | A. Walter Job     |

4.3) The officers of the corporation shall be elected by the board of Directors as expeditiously as possible after each annual meeting of the members of the corporation and such officers shall hold office for one (1) year or until their successors are duly elected and qualified.

#### ARTICLE II.

##### BY-LAWS

2.1) The initial by-laws of the corporation shall be adopted by its Board of Directors. The power to make, alter or repeal the By-Laws shall be vested in the Board of Directors.

#### ARTICLE I.

##### NO STOCK

10.1) This corporation is organized on a non-stock basis and all proceeds shall be used solely for charitable purposes.

ARTICLE XI.

INDEBTEDNESS

11.1) The highest amount of indebtedness or liability to which this corporation may at any time subject itself shall be the sum of One Million Dollars (\$1,000,000.00), provided any such sum or indebtedness shall not exceed two-thirds (2/3) of the value of the property of the corporation.

11.2) This corporation shall have power to bond or mortgage its property in a sum not exceeding One Million Dollars (\$1,000,000.00) for the purpose of carrying into effect the obligations of the corporation as set forth in this charter, or for any portion or part thereof.

ARTICLE XII.

REAL ESTATE

12.1) This corporation may hold real estate in the value of One Million Dollars (\$1,000,000.00), subject always to the approval of the circuit judge.

ARTICLE XIII.

SUBSCRIBERS

13.1) The name, post office address and residence of each of the subscribers to these Articles of Incorporation is:

|                        |                  |
|------------------------|------------------|
| 1. J. Howard Vaughn    | 109 W. Alb.      |
| 2. Warren S. Henderson | Golden Be        |
| 3. Marie L. Swift      | 425 Jay St.      |
| 4. C. A. Keller        | 703 Laurel Dr.   |
| 5. A. Walter Johns     | 50 People Drive, |

ARTICLE IV.  
AMENDMENT OF ARTICLES OF INCORPORATION

14.1) The Board of Directors of the corporation shall have the right to amend, alter, change, add to, or repeal any provisions contained in these Articles of Incorporation as provided in the By-Laws, providing that any such changes shall be consistent with the laws of this state which define, limit, or regulate the powers of this corporation or the directors of this corporation.

IN WITNESS WHEREOF, the undersigned have hereunto subscribed their names and affixed their seals at Venice, Florida, this the 1st day of June 1964.

J. Howard Vaughn (SEAL)  
J. Howard Vaughn

Warren S. Henderson (SEAL)  
Warren S. Henderson

Earle L. Swift (Seal)  
Earle L. Swift

C. A. Keller (Seal)  
C. A. Keller

A. Walter Johns (Seal)  
A. Walter Johns

STATE OF FLORIDA )  
                          ) ss:  
County of Sarasota )

I HEREBY CERTIFY that on this the 1st day of June 1964, before me, the undersigned authority, personally appeared J. HOWARD VAUGHN, WARREN S. HENDERSON, EARLE L. SWIFT, C. A. KELLER AND A. WALTER JOHNS, all to me well known and known to me to be the persons described in and who executed the foregoing Articles of Incorporation, and who severally acknowledged the execution thereof to be their free act and deed for the uses and purposes therein expressed.

WITNESS my hand and official seal at Venice, Florida, the date and year first above written.

Delroy J. Kyle  
Notary Public, State of Florida at Large

My Commission expires:  
Notary Public, State of Florida at Large  
My Commission Expires, Sept. 22, 1965  
Issued by H. B. E. E.

STATE OF FLORIDA     )  
                              ) ss:  
COUNTY OF SARASOTA )

The undersigned, after being duly sworn, deposes and states that he is one of the incorporators of UNITED FUND OF SOUTH SARASOTA COUNTY, INC., THAT he has read the foregoing Charter and acknowledged the same and that it is intended in good faith to carry out the purposes and objects there in set forth.

J. Howard Vaughn  
J. Howard Vaughn

Before me, a Notary Public, personally appeared J. HOWARD VAUGHN, to me well known to be one of the incorporators described in the foregoing Charter of UNITED FUND OF SOUTH SARASOTA COUNTY, INC., AND who, after being duly sworn subscribed the foregoing this 1st day of June 1964.

William L. Lyle  
Notary Public, State of Florida at Large

My Commission expires:

My Commission Expires June 24, 1967  
Signed in N. S. & A. S.

AMENDMENT OF ARTICLES OF NONPROFIT CORPORATION

HARRY ROHLING, 310 North Nassau Street, Venice Florida,  
President, and MRS. PAUL TAYLOR, Avenida d la Isla, Nokomis, Florida,  
Assistant Secretary of UNITED FUND OF SOUTH SARASOTA COUNTY, INC.  
Corporation respectfully show that:

1. The above named corporation was organized on June 4, 1964.
2. The above named corporation upon the proposal of its board of directors by resolution duly adopted by said board of directors adopted the : as an amendment of Article III of the Charter of said corporation.

ARTICLE III

PERIOD OF DURATION

3.1) The period of duration of the corporation is perpetual; provided, however, that in the event of dissolution of the corporation, all assets of the corporation remaining after payment of all costs and expenses of such dissolution shall be distributed to charitable and benevolent organizations which have qualified for exemption under Section 501 (c) (3) of the Internal Revenue Code, or any amendments thereof, or to the Federal Government, or to a State or local government for public purposes only, and none of such assets, upon dissolution, shall be distributed to any member, officer or director of this corporation.

3.2) Subject to the limitations contained in Article 14.1 and the provisions of Article XV of the Articles of Incorporation of this corporation, the Board of Directors of the corporation shall determine manner, division, allocation, distribution and recipients of such net assets of the corporation remaining upon dissolution of this corporation.

3. The above amendment was adopted by the board of directors of said corporation at a duly called special meeting of said board held on May 9, 1966 at Venice, Florida, pursuant to Article XIV of the Charter of said corporation.

4. The said board of directors also by unanimous vote further instructed the undersigned President and Assistant Secretary of the  
UNITED FUND OF SOUTH SARASOTA COUNTY - 310 NASSAU STREET - VENICE, FLORIDA

Corporation to file said Amendment with the office of the Secretary of State of the State of Florida and to pay the necessary filing fees thereof.

Dated this 17 day of March A. D. 1966.

UNITED FC. SOUTH SARASOTA COUNTY, INC.

By Harvey Rohlwing -- President

and Mrs. Paul Taylor -- Assistant Secretary

STATE OF FLORIDA

COUNTY OF SARASOTA

Before me the undersigned authority, personally appeared HARVEY ROHLWING, President and MRS. PAUL TAYLOR, Assistant Secretary of UNITED FUND OF SOUTH SARASOTA COUNTY, INC., known to me to be the persons described in and who executed the foregoing Amendment to Articles of Nonprofit Corporation, and they acknowledged before me that they executed the same for and in the name of UNITED FUND OF SOUTH SARASOTA COUNTY, INC.; that as such respective corporate officers they are duly authorized by said corporation to do so; that the foregoing Amendment to Articles of Nonprofit Corporation is the act and deed of said corporation.

IN WITNESS WHEREOF, I subscribe my hand and official seal in the County and State above named this 17 day of March, 1966.

Notary Public  
Notary Public

My Commission expires:

Notary Public State of Florida  
My Commission Expires for 1967  
at 11:00 A.M.



CERTIFICATE OF AMENDMENT OF  
CERTIFICATE OF INCORPORATION OF  
UNITED FUND OF SOUTH SARASOTA COUNTY, INC.

( a corporation not for profit )

FILED  
APR 12 8 35 AM '76  
CLERK OF DISTRICT COURT  
SARASOTA, FLORIDA

UNITED FUND OF SOUTH SARASOTA COUNTY, INC., a Florida corporation not for profit, hereby certifies as follows:

That the Board of Directors of said corporation, at a meeting duly called and held on October 28, 1975, adopted the following resolutions:

"RESOLVED that this Board of Directors, having the authority so to do under Article XIV of the Articles of Incorporation of this corporation, does hereby declare it advisable and does hereby change and alter Article I, Paragraph 1.1 of the Certificate of Incorporation so as to read as follows:

" ARTICLE I.  
NAME

1.1) The name of the corporation is United Way of South Sarasota County, Inc."

"BE IT FURTHER RESOLVED that the Secretary of this corporation is hereby authorized and directed to file a Certificate with the Secretary of State of Florida, signed by the President of this corporation and attested by its Secretary, certifying the adoption of this Resolution by the Board of Directors of this corporation in the manner prescribed in the Articles of Incorporation."

IN WITNESS WHEREOF, this corporation has caused this Certificate to be signed in its name by its President and attested by its Secretary, this the 21<sup>st</sup> day of NOVEMBER, 1975.

Attest

Howard Sharp  
Secretary

UNITED WAY OF SOUTH SARASOTA COUNTY,  
INC., a Florida corporation not for profit

By: John S. Booth III  
President

STATE OF FLORIDA  
COUNTY OF SARASOTA

I HEREBY CERTIFY that on this day, before me, a Notary Public duly authorized in the State and County named above to take acknowledgments, personally appeared JOHN S. BOOTH III and HOWARD SHARP to me known to be the persons described as President and Secretary, respectively, in and who executed the foregoing Certificate of Amendment to Articles of Incorporation, and acknowledged before me that they executed the same for the purposes therein stated.

WITNESS my hand and official seal in the County and State named above this 21<sup>st</sup> day of NOVEMBER, 1975.

(SEAL)

Notary Public

My Commission Expires: \_\_\_\_\_

APR 14

5-17



Articles of Amendment  
to  
Articles of Incorporation  
of

United Way of South Sarasota County

(Name of Corporation as currently filed with the Florida Dept. of State)

707395

(Document Number of Corporation (if known))

Pursuant to the provisions of section 617.1006, Florida Statutes, this *Florida Not For Profit Corporation* adopts the following amendment(s) to its Articles of Incorporation;

A. If amending name, enter the new name of the corporation:

N/A

*The new name must be distinguishable and contain the word "corporation" or "incorporated" or the abbreviation "Corp." or "Inc." "Company" or "Co." may not be used in the name.*

B. Enter new principal office address, if applicable:

N/A

(Principal office address MUST BE A STREET ADDRESS)

C. Enter new mailing address, if applicable:

N/A

(Mailing address MAY BE A POST OFFICE BOX)

D. If amending the registered agent and/or registered office address in Florida, enter the name of the new registered agent and/or the new registered office address:

Name of New Registered Agent:

Barbara Cruz

157 S Havana Road

(Florida street address)

New Registered Office Address:

Venice

(City)

Florida 34292

(Zip Code)

New Registered Agent's Signature, if changing Registered Agent:

*I hereby accept the appointment as registered agent. I am familiar with and accept the obligations of the position.*



Signature of New Registered Agent, if changing

FILED  
STATE  
CLERK  
JAN 31 2011  
TAMPA

If amending the Officers and/or Directors, enter the title and name of each officer/director being removed and title, name, and address of each Officer and/or Director being added:

(Attach additional sheets, if necessary)

Please note the officer/director title by the first letter of the office title:

P = President; V = Vice President; T = Treasurer; S = Secretary; D = Director; TR = Trustee; C = Chairman or Clerk; CEO = Chief Executive Officer; CFO = Chief Financial Officer. If an officer/director holds more than one title, list the first letter of each office held. President, Treasurer, Director would be PTD.

Changes should be noted in the following manner. Currently John Doe is listed as the PST and Mike Jones is listed as the V. There is a change, Mike Jones leaves the corporation, Sally Smith is named the V and S. These should be noted as John Doe, PT as a Change, Mike Jones, V as Remove, and Sally Smith, SV as an Add.

Example:

|  |           |                    |
|--|-----------|--------------------|
| <input checked="" type="checkbox"/> Change | <u>PT</u> | <u>John Doe</u>    |
| <input checked="" type="checkbox"/> Remove | <u>V</u>  | <u>Mike Jones</u>  |
| <input checked="" type="checkbox"/> Add    | <u>SV</u> | <u>Sally Smith</u> |

Type of Action  
(Check One)

Title

Name

Address

PLEASE SEE ATTACHED FOR DELETIONS / CHANGES.

1) ☐ Change  
☐ Add

☐ Remove

2) ☐ Change  
☐ Add

☐ Remove

3) ☐ Change  
☐ Add  
☐ Remove

4) ☐ Change  
☐ Add

☐ Remove

5) ☐ Change  
☐ Add

☐ Remove

6) ☐ Change  
☐ Add

☐ Remove

Page 2 of 4

E. If amending or adding additional Articles, enter change(s) here:

(attach additional sheets, if necessary). (Be specific)

NA

Page 3 of 4

The date of each amendment(s) adoption: 1/23/2020, if other than the date this document was signed.

Effective date if applicable: \_\_\_\_\_  
(no more than 90 days after amendment file date)

**Note:** If the date inserted in this block does not meet the applicable statutory filing requirements, this date will not be listed as the document's effective date on the Department of State's records.

Adoption of Amendment(s) (CHECK ONE)

- ☒ The amendment(s) was/were adopted by the members and the number of votes cast for the amendment(s) was/were sufficient for approval.

- ☐ There are no members or members entitled to vote on the amendment(s). The amendment(s) was/were adopted by the board of directors.

Dated

1/23/20

Signature

(By the chairman or vice chairman of the board, president or other officer-if directors have not been selected, by an incorporator - if in the hands of a receiver, trustee, or other court appointed fiduciary by that fiduciary)

David Waring

(Typed or printed name of person signing)

Chairman

(Title of person signing)

UNITED WAY OF SOUTH SARASOTA COUNTY

OFFICER DELETE, CHANGE OR ADD

DELETE:

| <u>TITLE</u> | <u>NAME</u>     |
|--------------|-----------------|
| TD           | GUNNIN, WILLIAM |
| ED           | PIERCE, DAVID,  |
| P            | CARNEY, PAULA   |
| S            | WERTMAN, DAVID  |

CHANGE:

| <u>TITLE</u> | <u>NAME</u>   |
|--------------|---------------|
| C (Chairman) | WARING, DAVID |

ADD:

| <u>TITLE</u> | <u>NAME</u>       | <u>ADDRESS</u>                              |
|--------------|-------------------|---|
| VC           | FERRUGIA, SHARMA  | 1800 S TAMIAMI TRAIL<br>VENICE, FL 34293    |
| S            | DODD, AUSTIN      | 17179 TAMIAMI TRAIL<br>NORTH PORT, FL 34287 |
| T            | CASTELLANO, KATHY | 500 US 41 BYPASS NORTH<br>VENICE, FL 34285  |
| PCEO         | CRUZ, BARBARA     | 157 S HAVANA ROAD<br>VENICE, FL 34292       |



ATLANTA GA 39901-0001

In reply refer to: 0752453551  
July 31, 2018 LTR 4168C 0  
59-1100846 000000 00

00029452  
BODC: TE

UNITED WAY OF SOUTH SARASOTA COUNTY  
INC  
157 S HAVANA RD  
VENICE FL 34292-3104



013282

Employer ID number: 59-1100846  
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated July 20, 2018, about your tax-exempt status.

We issued you a determination letter in June 1966, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

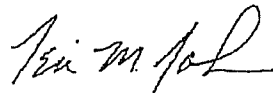
0752453551  
July 31, 2018 LTR 4168C 0  
59-1100846 000000 00  
00029453

UNITED WAY OF SOUTH SARASOTA COUNTY  
INC  
157 S HAVANA RD  
VENICE FL 34292-3104

local time, Monday through Friday (Alaska and Hawaii follow Pacific  
time).

Thank you for your cooperation.

Sincerely yours,



Teri M. Johnson  
Operations Manager, AM Ops. 3



## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

2024

Open to Public Inspection

Department of the Treasury  
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

|   |  |
|---|--|
| <b>A</b> For the 2024 calendar year, or tax year beginning , 2024, and ending , 20  |  |
| <b>B</b> Check 1 applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return/terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> UNITED WAY OF SOUTH SARASOTA COUNTY INC<br>4242 S TAMiami TRAIL<br>VENICE, FL 34293 |
| <b>D</b> Employer identification number<br>59-1100846   |  |
| <b>E</b> Telephone number<br>941-484-4811   |  |
| <b>G</b> Gross receipts \$ 2,968,954.   |  |
| <b>F</b> Name and address of principal officer:<br>SAME AS C ABOVE  |  |
| <b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  |  |
| <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "No," attach a list. See instructions.  |  |
| <b>I</b> Tax exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527  |  |
| <b>J</b> Website: UWSSC.ORG   |  |
| <b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other   |  |
| <b>L</b> Year of formation: 1964  |  |
| <b>M</b> State of legal domicile: FL  |  |

## Part I Summary

|                             |  |  |            |
|-----------------------------|--|--|------------|
| Activities & Governance     | 1  | Briefly describe the organization's mission or most significant activities: SEE SCHEDULE O   |            |
|                             | 2  | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets |            |
|                             | 3  | Number of voting members of the governing body (Part VI, line 1a)  | 10         |
|                             | 4  | Number of independent voting members of the governing body (Part VI, line 1b)  | 14         |
|                             | 5  | Total number of individuals employed in calendar year 2024 (Part V, line 2a)   | 23         |
| Revenue                     | 6  | Total number of volunteers (estimate if necessary)   | 0          |
|                             | 7a   | Total unrelated business revenue from Part VIII, column (C), line 12   | 2,125.     |
|                             | 7b   | Net unrelated business taxable income from Form 990-T, Part I, line 11   | 0.         |
|                             | 8  | Contributions and grants (Part VIII, line 1h)  | 877,505.   |
|                             | 9  | Program service revenue (Part VIII, line 2g)   | 1,466,195. |
| Expenses                    | 10   | Investment income (Part VIII, column (A), lines 3, 4, and 7d)  | 1,307,943. |
|                             | 11   | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)   | 87,075.    |
|                             | 12   | Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12)   | 18,874.    |
|                             | 13   | Grants and similar amounts paid (Part IX, column (A), lines 1-3)   | 1,309,695. |
|                             | 14   | Benefits paid to or for members (Part IX, column (A), line 4)  | 2,880,087. |
| Net Assets or Fund Balances | 15   | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)  | 226,924.   |
|                             | 16a  | Professional fundraising fees (Part IX, column (A), line 11e)  | 198,888.   |
|                             | 17   | b Total fundraising expenses (Part IX, column (D), line 25)  | 415,854.   |
|                             | 18   | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)   | 1,601,200. |
|                             | 19   | Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)   | 970,718.   |
| Net Assets or Fund Balances | 20   | Revenue less expenses Subtract line 18 from line 12  | 1,613,496. |
|                             | 21   | Total assets (Part X, line 16)   | -303,801.  |
|                             | 22   | Total liabilities (Part X, line 26)  | -433,807.  |
|                             | 23   | Net assets or fund balances. Subtract line 21 from line 20   | 1,992,249. |
|                             | 24   | Beginning of Current Year  | 1,607,652. |
| 25                          | End of Year  | 719,942.   |            |
| 26                          | Net assets or fund balances. Subtract line 21 from line 20 | 1,308,210.   |            |

## Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on information of which preparer has no knowledge.

|                        |                              |                         |                      |              |   |           |
|------------------------|------------------------------|-------------------------|----------------------|--------------|---|-----------|
| Sign Here              | Signature of officer         | Date                    |                      |              |   |           |
|                        | BARBARA CRUZ                 | PRESIDENT & CEO         |                      |              |   |           |
| Paid Preparer Use Only | Type or print name and title | Preparer's name         | Preparer's signature | Date         | Check <input type="checkbox"/> if self-employed | PTIN      |
|                        |                              | MARK S. RING, CPA       | MARK S. RING, CPA    | 5/12/25      |   | P00612109 |
|                        | Firm's name                  | HOUGH & COMPANY PA CPAs | Firm's EIN           | 59-1467762   |   |           |
|                        | Firm's address               | 248 NOKOMIS AVE S       | Phone no             | 941-488-7768 |   |           |
|                        |                              | VENICE, FL 34285        |                      |              |   |           |

May the IRS discuss this return with the preparer shown above? See instructions.

☒ Yes ☐ No

**Part III** Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

☒

1 Briefly describe the organization's mission:

SEE SCHEDULE O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐

Yes

☒

No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐

Yes

☒

No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code ) (Expenses \$ 2,629,877, including grants of \$ ) (Revenue \$ 2,623,081.)

FUNDING ALLOCATIONS TO LOCAL UNITED WAY AGENCIES PROVIDING HUMAN SERVICES TO VENICE, ENGLEWOOD, NORTH PORT, NOKOMIS, LAUREL AND OSPREY, FLORIDA

4b (Code ) (Expenses \$ 143,493, including grants of \$ ) (Revenue \$ 141,724.)

VITA: VOLUNTEER INCOME TAX ASSISTANCE, VITA IS AN IRS PROGRAM THAT UTILIZES CERTIFIED VOLUNTEERS TO HELP PROVIDE FREE AND ACCURATE TAX PREPARATION SERVICES TO LOW- TO MODERATE INCOME TAXPAYERS, THESE SERVICES ARE PROVIDED AT A VARIETY OF PUBLIC LOCATIONS SUCH AS LIBRARIES, SCHOOLS AND NEIGHBORHOOD CENTERS IN CERTAIN HIGH-NEED AREAS. VITA HAS BEEN INSTRUMENTAL IN HELPING ALICE (ASSTED LIMITED, INCOME CONSTRAINED, EMPLOYED) HOUSEHOLDS RECEIVE THOUSANDS OF DOLLARS IN ADDITIONAL REFUNDS.

4c (Code ) (Expenses \$ 9,333, including grants of \$ ) (Revenue \$ 9,933.)

UNITED WAY SOUTH SARASOTA COUNTY'S WOMEN UNITED WAS CREATED TO ENGAGE, EMPOWER AND EDUCATE LOCAL WOMEN INTERESTED IN STRENGTHENING THEIR COMMUNITY THROUGH SELFLESS WORK SUCH AS FUND RAISING, VOLUNTEERING, NETWORKING, AND EDUCATIONAL OPPORTUNITIES.

4d Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 2,782,703.

**Part IV Checklist of Required Schedules**

|  | Yes | No |
|--|-----|----|
| 1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A.   | X   |    |
| 2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions.   | X   |    |
| 3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I.  |     | X  |
| 4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II.   |     | X  |
| 5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III.   |     | X  |
| 6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I.  |     | X  |
| 7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II.  |     | X  |
| 8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III.   |     | X  |
| 9 Did the organization report an affidavit in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV.         |     | X  |
| 10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? If "Yes," complete Schedule D, Part V.   |     | X  |
| 11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.  |     |    |
| a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.   | X   |    |
| b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.  |     | X  |
| c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.  |     | X  |
| d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.   | X   |    |
| e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.   |     | X  |
| f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X.  |     | X  |
| 12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII.  | X   |    |
| b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.   |     | X  |
| 13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.  |     | X  |
| 14a Did the organization maintain an office, employees, or agents outside of the United States?  |     | X  |
| b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV. |     | X  |
| 15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV.   |     | X  |
| 16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV.   |     | X  |
| 17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions.   |     | X  |
| 18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II.   | X   |    |
| 19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III.   |     | X  |
| 20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H.   |     | X  |
| b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?   |     |    |
| 21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II.  | X   |    |

**Part IV Checklist of Required Schedules (continued)**

|   | Yes | No |
|---|-----|----|
| 22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III  | X   |    |
| 23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J  |     | X  |
| 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2001? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a  |     | X  |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?   |     |    |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?  |     |    |
| d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?   |     |    |
| 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I  |     | X  |
| b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I   |     | X  |
| 26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II   |     | X  |
| 27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III |     | X  |
| 28 Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions).  |     |    |
| a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV  |     | X  |
| b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV   |     | X  |
| c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV  |     | X  |
| 29 Did the organization receive more than \$25,000 in noncash contributions? If "Yes," complete Schedule M  | X   |    |
| 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M   |     | X  |
| 31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I   |     | X  |
| 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II   |     | X  |
| 33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I   |     | X  |
| 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1   |     | X  |
| 35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?   |     | X  |
| b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2   |     |    |
| 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2   |     | X  |
| 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI  |     | X  |
| 38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note: All Form 990 filers are required to complete Schedule O.  | X   |    |

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V. ☐

|  | Yes | No |
|--|-----|----|
| 1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable  |     |    |
| b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable  |     |    |
| c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? |     | X  |



**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

|  | Yes          | No |
|--|--------------|----|
| <b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.   | <b>2a</b> 23 |    |
| <b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?  | <b>2b</b> X  |    |
| <b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year?  | <b>3a</b> X  |    |
| <b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O   | <b>3b</b> X  |    |
| <b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | <b>4a</b>    | X  |
| <b>b</b> If "Yes," enter the name of the foreign country<br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)   |              |    |
| <b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  | <b>5a</b>    | X  |
| <b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  | <b>5b</b>    | X  |
| <b>c</b> If "Yes" to line 5a or 5b, did the organization file Form 8886-T?   | <b>5c</b>    |    |
| <b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?                                    | <b>6a</b>    | X  |
| <b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?   | <b>6b</b>    |    |
| <b>7 Organizations that may receive deductible contributions under section 170(c).</b>   |              |    |
| <b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?   | <b>7a</b>    | X  |
| <b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided?   | <b>7b</b>    |    |
| <b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  | <b>7c</b>    | X  |
| <b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year   | <b>7d</b>    |    |
| <b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?   | <b>7e</b>    | X  |
| <b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  | <b>7f</b>    | X  |
| <b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  | <b>7g</b>    |    |
| <b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  | <b>7h</b>    |    |
| <b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?   | <b>8</b>     |    |
| <b>9 Sponsoring organizations maintaining donor advised funds.</b>   |              |    |
| <b>a</b> Did the sponsoring organization make any taxable distributions under section 4966?  | <b>9a</b>    |    |
| <b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?   | <b>9b</b>    |    |
| <b>10 Section 501(c)(7) organizations.</b> Enter:  |              |    |
| <b>a</b> Initiation fees and capital contributions included on Part VIII, line 12  | <b>10a</b>   |    |
| <b>b</b> Gross receipts included on Form 990, Part VIII, line 12, for public use of club facilities  | <b>10b</b>   |    |
| <b>11 Section 501(c)(12) organizations.</b> Enter:   |              |    |
| <b>a</b> Gross income from members or shareholders   | <b>11a</b>   |    |
| <b>b</b> Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)   | <b>11b</b>   |    |
| <b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?  | <b>12a</b>   |    |
| <b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year   | <b>12b</b>   |    |
| <b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>   |              |    |
| <b>a</b> Is the organization licensed to issue qualified health plans in more than one state?<br>Note: See the instructions for additional information the organization must report on Schedule O  | <b>13a</b>   |    |
| <b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans   | <b>13b</b>   |    |
| <b>c</b> Enter the amount of reserves on hand  | <b>13c</b>   |    |
| <b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year?  | <b>14a</b>   | X  |
| <b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O   | <b>14b</b>   |    |
| <b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?<br>If "Yes," see the instructions and file Form 4720, Schedule N                | <b>15</b>    | X  |
| <b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income?<br>If "Yes," complete Form 4720, Schedule O  | <b>16</b>    | X  |
| <b>17 Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person, engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?<br>If "Yes," complete Form 6069.    | <b>17</b>    |    |

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

☒**Section A. Governing Body and Management**

|   |       | Yes | No |
|---|-------|-----|----|
| 1a Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O. | 1a 10 |     |    |
| b Enter the number of voting members included on line 1a, above, who are independent.   | 1b 14 |     |    |
| 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?   | 2     |     | X  |
| 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?   | 3     |     | X  |
| 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?  | 4     |     | X  |
| 5 Did the organization become aware during the year of a significant diversion of the organization's assets?  | 5     |     | X  |
| 6 Did the organization have members or stockholders?  | 6     |     | X  |
| 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?   | 7a    |     | X  |
| b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?   | 7b    |     | X  |
| 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:   |       |     |    |
| a The governing body?   | 8a    | X   |    |
| b Each committee with authority to act on behalf of the governing body?   | 8b    | X   |    |
| 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O.   | 9     |     | X  |

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code)

|  | Yes | No |
|--|-----|----|
| 10a Did the organization have local chapters, branches, or affiliates?   | 10a | X  |
| b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?   | 10b |    |
| 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?  | 11a | X  |
| b Describe on Schedule O the process, if any, used by the organization to review this Form 990. SEE SCHEDULE O   |     |    |
| 12a Did the organization have a written conflict of interest policy? If "No," go to line 13.   | 12a | X  |
| b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?  | 12b | X  |
| c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done. SEE SCHEDULE O   | 12c | X  |
| 13 Did the organization have a written whistleblower policy?   | 13  | X  |
| 14 Did the organization have a written document retention and destruction policy?  | 14  | X  |
| 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?  |     |    |
| a The organization's CEO, Executive Director, or top management official. SEE SCHEDULE O.  | 15a | X  |
| b Other officers or key employees of the organization.   | 15b | X  |
| If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.   |     |    |
| 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?  | 16a | X  |
| b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? | 16b |    |

**Section C. Disclosure**

17 List the states with which a copy of this Form 990 is required to be filed. NONE

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. SEE SCHEDULE O

20 State the name, address, and telephone number of the person who possesses the organization's books and records.

BARBARA CRUZ 4242 S TAMiami TRAIL VENICE FL 34293 941-484-4811

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII. ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

| (A)<br>Name and title               | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|-------------------------------------|--|--|-----------------------|---------|--------------|------------------------------|---|--|---|
|                                     |  | Individual trustee or director   | Institutional trustee | Officer | Key employee | Highest compensated employee |   |  |   |
| (1) BARBARA CRUZ<br>PRESIDENT & CEO | 40<br>0  | X  |                       | X       |              |                              | 130,847.  | 0.   | 0.  |
| (2) NICOLE CARNEY<br>SECRETARY      | 5<br>0   | X  |                       | X       |              |                              | 0.  | 0.   | 0.  |
| (3) SHARMA FERRUGA<br>CHAIRMAN      | 10<br>0  | X  |                       | X       |              |                              | 0.  | 0.   | 0.  |
| (4) DOUG DIVIRGLIO<br>CHAIRMAN      | 0<br>0   | X  |                       |         |              |                              | 0.  | 0.   | 0.  |
| (5) BILL POLLOCK<br>DIRECTOR        | 0<br>0   | X  |                       |         |              |                              | 0.  | 0.   | 0.  |
| (6) KRISTEN MYERS<br>DIRECTOR       | 0<br>0   | X  |                       |         |              |                              | 0.  | 0.   | 0.  |
| (7) JENNIFER HUBER<br>DIRECTOR      | 0<br>0   | X  |                       |         |              |                              | 0.  | 0.   | 0.  |
| (8) PADDY PADMANBHAN<br>TREASURER   | 5<br>0   | X  |                       | X       |              |                              | 0.  | 0.   | 0.  |
| (9) MELISSA SPECIALE<br>DIRECTOR    | 0<br>0   | X  |                       |         |              |                              | 0.  | 0.   | 0.  |
| (10) MIKE DUMAR<br>DIRECTOR         | 0<br>0   | X  |                       |         |              |                              | 0.  | 0.   | 0.  |
| (11)                                |  |  |                       |         |              |                              |   |  |   |
| (12)                                |  |  |                       |         |              |                              |   |  |   |
| (13)                                |  |  |                       |         |              |                              |   |  |   |
| (14)                                |  |  |                       |         |              |                              |   |  |   |



**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

| (A)<br>Name and title  | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|--|--|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
|  |  | Individual trustee or director   | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| (15)   |  |  |                       |         |              |                              |        |   |  |   |
| (16)   |  |  |                       |         |              |                              |        |   |  |   |
| (17)   |  |  |                       |         |              |                              |        |   |  |   |
| (18)   |  |  |                       |         |              |                              |        |   |  |   |
| (19)   |  |  |                       |         |              |                              |        |   |  |   |
| (20)   |  |  |                       |         |              |                              |        |   |  |   |
| (21)   |  |  |                       |         |              |                              |        |   |  |   |
| (22)   |  |  |                       |         |              |                              |        |   |  |   |
| (23)   |  |  |                       |         |              |                              |        |   |  |   |
| (24)   |  |  |                       |         |              |                              |        |   |  |   |
| (25)   |  |  |                       |         |              |                              |        |   |  |   |
| <b>1b Subtotal</b>   |  |  |                       |         |              |                              |        | 130,847.  | 0.   | 0.  |
| <b>c Total from continuation sheets to Part VII, Section A</b> |  |  |                       |         |              |                              |        | 0.  | 0.   | 0.  |
| <b>d Total (add lines 1b and 1c)</b>                           |  |  |                       |         |              |                              |        | 130,847.  | 0.   | 0.  |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **1**

**3** Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual.

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual.

**5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person.

|          | Yes | No |
|----------|-----|----|
| <b>3</b> |     | X  |
| <b>4</b> |     | X  |
| <b>5</b> |     | X  |

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A)<br>Name and business address | (B)<br>Description of services | (C)<br>Compensation |
|----------------------------------|--------------------------------|---------------------|
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **0**

**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

|  |   |   | (A)<br>Total revenue | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from tax<br>under sections<br>512-514 |
|--|---|---|----------------------|--|---|--|
| <b>Contributions, Gifts, Grants,<br/>and Other Similar Amounts</b>   | 1a Federated campaigns  | 1a  |                      |  |   |  |
|  | b Membership dues   | 1b  |                      |  |   |  |
|  | c Fundraising events  | 1c  |                      |  |   |  |
|  | d Related organizations   | 1d  |                      |  |   |  |
|  | e Government grants (contributions)   | 1e  |                      |  |   |  |
|  | f All other contributions, gifts, grants, and<br>similar amounts not included above | 1f  | 1,466,195.           |  |   |  |
|  | g Noncash contributions included in<br>lines 1a-1f                                  | 1g  | 1,004,870.           |  |   |  |
|  | <b>h Total. Add lines 1a-1f</b>   |   | 1,466,195.           |  |   |  |
| <b>Program Service Revenue</b>   | Business Code   |   |                      |  |   |  |
|  | 2a HURRICANE IAN  |   | 511,274.             | 511,274.   |   |  |
|  | b LONG TERM RECOVERY GROUP  |   | 397,647.             | 397,647.   |   |  |
|  | c VITA  |   | 141,724.             | 141,724.   |   |  |
|  | d HURRICANE MILTON  |   | 113,116.             | 113,116.   |   |  |
|  | e CELEBRITY SOFTBALL & CONC   |   | 59,459.              | 59,459.  |   |  |
|  | f All other program service revenue   |   | 84,723.              | 84,723.  |   |  |
| <b>g Total. Add lines 2a-2f</b>  |   | 1,307,943.  |                      |  |   |  |
| <b>Other Revenue</b>   | 3 Investment income (including dividends, interest, and<br>other similar amounts)   |   | 87,075.              | 87,075.  |   |  |
|  | 4 Income from investment of tax-exempt bond proceeds                                |   |                      |  |   |  |
|  | 5 Royalties   |   |                      |  |   |  |
|  | 6a Gross rents  | (i) Real  | 41,563.              |  |   |  |
|  |   | (ii) Personal                                     |                      |  |   |  |
|  |   | 6a  | 41,563.              |  |   |  |
|  | b Less: rental expenses   | 6b  | 39,438.              |  |   |  |
|  | c Rental income or (loss)   | 6c  | 2,125.               |  |   |  |
|  | d Net rental income or (loss)   |   | 2,125.               |  | 2,125.                                  |  |
|  | 7a Gross amount from<br>sales of assets<br>other than inventory                     | (i) Securities                                    |                      |  |   |  |
|  |   | (ii) Other  |                      |  |   |  |
|  |   | 7a  |                      |  |   |  |
|  |   | b Less: cost or other basis<br>and sales expenses | 7b                   |  |   |  |
|  | c Gain or (loss)  | 7c  |                      |  |   |  |
| d Net gain or (loss)   |   |   |                      |  |   |  |
| 8a Gross income from fundraising events<br>(not including \$<br>of contributions reported on line 1c).<br>See Part IV, line 18 | 8a  | 59,459.   |                      |  |   |  |
|  | b Less: direct expenses   | 8b  | 49,429.              |  |   |  |
|  | c Net income or (loss) from fundraising events                                      |   | 10,030.              |  |   |  |
| 9a Gross income from gaming activities<br>See Part IV, line 19   | 9a  |   |                      |  |   |  |
|  | b Less: direct expenses   | 9b  |                      |  |   |  |
|  | c Net income or (loss) from gaming activities                                       |   |                      |  |   |  |
| 10a Gross sales of inventory, less<br>returns and allowances   | 10a   |   |                      |  |   |  |
|  | b Less: cost of goods sold  | 10b   |                      |  |   |  |
|  | c Net income or (loss) from sales of inventory                                      |   |                      |  |   |  |
| <b>Miscellaneous<br/>Revenue</b>   | Business Code   |   |                      |  |   |  |
|  | 11a REBATES   |   | 6,719.               | 6,719.   |   |  |
|  | b   |   |                      |  |   |  |
|  | c   |   |                      |  |   |  |
|  | d All other revenue   |   |                      |  |   |  |
| <b>e Total. Add lines 11a-11d</b>  |   | 6,719.  |                      |  |   |  |
| <b>12 Total revenue. See instructions</b>  |   |   | 2,880,087.           | 1,401,737.   | 2,125.                                  | 0.   |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A)

Check if Schedule O contains a response or note to any line in this Part IX ☐

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.   | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|--|-----------------------|---------------------------------|--|-----------------------------|
| 1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.  | 190,500.              | 190,500.                        |  |                             |
| 2 Grants and other assistance to domestic individuals. See Part IV, line 22.   | 8,388.                | 8,388.                          |  |                             |
| 3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.  |                       |                                 |  |                             |
| 4 Benefits paid to or for members.   |                       |                                 |  |                             |
| 5 Compensation of current officers, directors, trustees, and key employees.  | 130,847.              | 13,085.                         | 64,114.                                | 53,648.                     |
| 6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).  | 0.                    | 0.                              | 0.                                     | 0.                          |
| 7 Other salaries and wages.  | 1,470,353.            | 1,323,820.                      | 29,449.                                | 117,084.                    |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).  |                       |                                 |  |                             |
| 9 Other employee benefits.   |                       |                                 |  |                             |
| 10 Payroll taxes.  |                       |                                 |  |                             |
| 11 Fees for services (nonemployees):   |                       |                                 |  |                             |
| a Management.  |                       |                                 |  |                             |
| b Legal.   |                       |                                 |  |                             |
| c Accounting.  | 14,120.               | 14,120.                         |  |                             |
| d Lobbying.  |                       |                                 |  |                             |
| e Professional fundraising services. See Part IV, line 17.   |                       |                                 |  |                             |
| f Investment management fees.  |                       |                                 |  |                             |
| g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)  |                       |                                 |  |                             |
| 12 Advertising and promotion.  |                       |                                 |  |                             |
| 13 Office expenses.  | 341,057.              | 127,592.                        | 102,955.                               | 110,510.                    |
| 14 Information technology.   |                       |                                 |  |                             |
| 15 Royalties.  |                       |                                 |  |                             |
| 16 Occupancy.  |                       |                                 |  |                             |
| 17 Travel.   |                       |                                 |  |                             |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials.   |                       |                                 |  |                             |
| 19 Conferences, conventions, and meetings.   |                       |                                 |  |                             |
| 20 Interest.   |                       |                                 |  |                             |
| 21 Payments to affiliates.   |                       |                                 |  |                             |
| 22 Depreciation, depletion, and amortization.  | 15,245.               |                                 | 15,245.                                |                             |
| 23 Insurance.  | 3,949.                |                                 | 3,949.                                 |                             |
| 24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)                                     |                       |                                 |  |                             |
| a PROGRAM EXPENSES   | 1,066,821.            | 1,066,821.                      |  |                             |
| b DONOR DEVELOPMENT  | 102,822.              | 38,377.                         |  | 64,445.                     |
| c TELEPHONE  | 9,230.                |                                 | 9,230.                                 |                             |
| d ALLOCATED TO SPECIAL PROJECTS  |                       |                                 |  |                             |
| e All other expenses.  | -39,438.              |                                 | -39,438.                               |                             |
| 25 Total functional expenses. Add lines 1 through 24e.   | 3,313,894.            | 2,782,703.                      | 185,504.                               | 345,687.                    |
| 26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). |                       |                                 |  |                             |

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

|  |   | (A)<br>Beginning of year |            | (B)<br>End of year |
|--|---|--------------------------|------------|--------------------|
| <b>Assets</b>  | 1 Cash — noninterest-bearing  | 60,484.                  | 1          | 102,775.           |
|  | 2 Savings and temporary cash investments  | 308,183.                 | 2          | 69,511.            |
|  | 3 Pledges and grants receivable, net  |                          | 3          |                    |
|  | 4 Accounts receivable, net  |                          | 4          |                    |
|  | 5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons |                          | 5          |                    |
|  | 6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)   |                          | 6          |                    |
|  | 7 Notes and loans receivable, net   |                          | 7          |                    |
|  | 8 Inventories for sale or use   |                          | 8          |                    |
|  | 9 Prepaid expenses and deferred charges   | 585.                     | 9          | 19,485.            |
|  | 10a Land, buildings, and equipment: cost or other basis<br>Complete Part VI of Schedule D   | 10a 221,280.             |            |                    |
|  | b Less: accumulated depreciation  | 10b 56,055.              | 168,221.   | 10c 165,225.       |
|  | 11 Investments — publicly traded securities   |                          | 11         |                    |
|  | 12 Investments — other securities. See Part IV, line 11   |                          | 12         |                    |
|  | 13 Investments — program-related. See Part IV, line 11  |                          | 13         |                    |
|  | 14 Intangible assets  |                          | 14         |                    |
|  | 15 Other assets. See Part IV, line 11.  | 1,454,776.               | 15         | 1,250,656.         |
| 16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 33). | 1,992,249.  | 16                       | 1,607,652. |                    |
| <b>Liabilities</b>   | 17 Accounts payable and accrued expenses  | 65,648.                  | 17         | 94,994.            |
|  | 18 Grants payable   |                          | 18         |                    |
|  | 19 Deferred revenue   | 618,391.                 | 19         | 624,948.           |
|  | 20 Tax-exempt bond liabilities  |                          | 20         |                    |
|  | 21 Escrow or custodial account liability. Complete Part IV of Schedule D  |                          | 21         |                    |
|  | 22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons     |                          | 22         |                    |
|  | 23 Secured mortgages and notes payable to unrelated third parties   |                          | 23         |                    |
|  | 24 Unsecured notes and loans payable to unrelated third parties   |                          | 24         |                    |
|  | 25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D.   |                          | 25         |                    |
|  | 26 <b>Total liabilities.</b> Add lines 17 through 25.   | 684,039.                 | 26         | 719,942.           |
| <b>Net Assets or Fund Balances</b>                                   | Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.   |                          |            |                    |
|  | 27 Net assets without donor restrictions  | 1,308,210.               | 27         | 887,710.           |
|  | 28 Net assets with donor restrictions   |                          | 28         |                    |
|  | Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.  |                          |            |                    |
|  | 29 Capital stock or trust principal, or current funds   |                          | 29         |                    |
|  | 30 Paid-in or capital surplus, or land, building, or equipment fund   |                          | 30         |                    |
|  | 31 Retained earnings, endowment, accumulated income, or other funds   |                          | 31         |                    |
|  | 32 <b>Total net assets or fund balances</b>   | 1,308,210.               | 32         | 887,710.           |
| 33 <b>Total liabilities and net assets/fund balances</b>             | 1,992,249.  | 33                       | 1,607,652. |                    |

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

|    |  |    |            |
|----|--|----|------------|
| 1  | Total revenue (must equal Part VIII, column (A), line 12)  | 1  | 2,880,087. |
| 2  | Total expenses (must equal Part IX, column (A), line 25)   | 2  | 3,313,894. |
| 3  | Revenue less expenses Subtract line 2 from line 1  | 3  | -433,807.  |
| 4  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | 4  | 1,308,210. |
| 5  | Net unrealized gains (losses) on investments   | 5  | 13,307.    |
| 6  | Donated services and use of facilities   | 6  |            |
| 7  | Investment expenses  | 7  |            |
| 8  | Prior period adjustments   | 8  |            |
| 9  | Other changes in net assets or fund balances (explain on Schedule O)   | 9  | 0.         |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | 10 | 887,710.   |

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

|   | Yes | No |
|---|-----|----|
| 1 Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.  |     |    |
| 2a Were the organization's financial statements compiled or reviewed by an independent accountant?<br>If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |     | X  |
| b Were the organization's financial statements audited by an independent accountant? ...<br>If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both<br><input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis             | X   |    |
| c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? ...<br>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.   |     | X  |
| 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? ...  |     | X  |
| b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits.   |     |    |

SCHEDULE A  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public  
Inspection

Name of the organization

UNITED WAY OF SOUTH SARASOTA COUNTY INC

Employer identification number

59-1100846

**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete **Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete **Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete **Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete **Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations:
- g Provide the following information about the supported organization(s).

| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1-10 above (see instructions)) | (iv) Is the organization listed in your governing document? |    | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|------------------------------------|----------|---|---|----|---|---|
|                                    |          |   | Yes   | No |   |   |
| (A)                                |          |   |   |    |   |   |
| (B)                                |          |   |   |    |   |   |
| (C)                                |          |   |   |    |   |   |
| (D)                                |          |   |   |    |   |   |
| (E)                                |          |   |   |    |   |   |
| Total                              |          |   |   |    |   |   |

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)  | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023   | (e) 2024   | (f) Total  |
|--|----------|----------|----------|------------|------------|------------|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")   | 228,040. | 717,740. | 923,967. | 1,145,511. | 2,765,160. | 5,780,418. |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.   |          |          |          |            |            | 0.         |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge.   |          |          |          |            |            | 0.         |
| 4 <b>Total.</b> Add lines 1 through 3.   | 228,040. | 717,740. | 923,967. | 1,145,511. | 2,765,160. | 5,780,418. |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f). |          |          |          |            |            | 309,296.   |
| 6 <b>Public support.</b> Subtract line 5 from line 4.  |          |          |          |            |            | 5,471,122. |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)  | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023   | (e) 2024   | (f) Total                |
|--|----------|----------|----------|------------|------------|--------------------------|
| 7 Amounts from line 4  | 228,040. | 717,740. | 923,967. | 1,145,511. | 2,765,160. | 5,780,418.               |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.   | 477.     | 19,260.  | -23,898. | 105,176.   | 86,989.    | 188,004.                 |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on.  |          |          |          |            |            | 0.                       |
| 10 Other income. Do not include gain or loss from the sale of capital assets. (Explain in Part VI.)  |          |          |          |            |            | 0.                       |
| 11 <b>Total support.</b> Add lines 7 through 10.   |          |          |          |            |            | 5,968,422.               |
| 12 Gross receipts from related activities, etc. (see instructions)   |          |          |          |            | 12         | 0.                       |
| 13 <b>First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here.</b> |          |          |          |            |            | <input type="checkbox"/> |

**Section C. Computation of Public Support Percentage**

|  |    |         |
|--|----|---------|
| 14 Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f)) | 14 | 91.67 % |
| 15 Public support percentage from 2023 Schedule A, Part II, line 14                        | 15 | 87.64 % |

16a **33-1/3% support test—2024.** If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization. ☒

b **33-1/3% support test—2023.** If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization. ☐

17a **10%-facts-and-circumstances test—2024.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization. ☐

b **10%-facts-and-circumstances test—2023.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization. ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. ☐

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)  | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unrelated trade or business" income.)  |          |          |          |          |          |           |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose |          |          |          |          |          |           |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513   |          |          |          |          |          |           |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf  |          |          |          |          |          |           |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge  |          |          |          |          |          |           |
| 6 <b>Total.</b> Add lines 1 through 5  |          |          |          |          |          |           |
| 7a Amounts included on lines 1, 2, and 3 received from disqualified persons  |          |          |          |          |          |           |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year           |          |          |          |          |          |           |
| c Add lines 7a and 7b  |          |          |          |          |          |           |
| 8 <b>Public support.</b> (Subtract line 7c from line 6.)   |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)   | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| 9 Amounts from line 6   |          |          |          |          |          |           |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources |          |          |          |          |          |           |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                           |          |          |          |          |          |           |
| c Add lines 10a and 10b   |          |          |          |          |          |           |
| 11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on      |          |          |          |          |          |           |
| 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)                                  |          |          |          |          |          |           |
| 13 <b>Total support.</b> (Add lines 9, 10c, 11, and 12.)  |          |          |          |          |          |           |

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

**Section C. Computation of Public Support Percentage**

|  |    |   |
|--|----|---|
| 15 Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f)) | 15 | % |
| 16 Public support percentage from 2023 Schedule A, Part III, line 15                       | 16 | % |

**Section D. Computation of Investment Income Percentage**

|   |    |   |
|---|----|---|
| 17 Investment income percentage for 2024 (line 10c, column (f), divided by line 13, column (f)) | 17 | % |
| 18 Investment income percentage from 2023 Schedule A, Part III, line 17                         | 18 | % |

19a **33-1/3% support tests—2024.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

b **33-1/3% support tests—2023.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐



**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.   | 1   |    |
| 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).  | 2   |    |
| 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.   | 3a  |    |
| b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.  | 3b  |    |
| c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.   | 3c  |    |
| 4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.   | 4a  |    |
| b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.   | 4b  |    |
| c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.  | 4c  |    |
| 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below. (If applicable) Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document). | 5a  |    |
| b <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?   | 5b  |    |
| c <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?  | 5c  |    |
| 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .  | 6   |    |
| 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)) a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).   | 7   |    |
| 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).  | 8   |    |
| 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .   | 9a  |    |
| b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .  | 9b  |    |
| c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .   | 9c  |    |
| 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.  | 10a |    |
| b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)   | 10b |    |

**Part IV** Supporting Organizations (continued)

11 Has the organization accepted a gift or contribution from any of the following persons?

a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?

b A family member of a person described on line 11a above?

c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.

|     | Yes | No |
|-----|-----|----|
| 11a |     |    |
| 11b |     |    |
| 11c |     |    |

**Section B. Type I Supporting Organizations**

- 1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.
- 2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.

|   | Yes | No |
|---|-----|----|
| 1 |     |    |
| 2 |     |    |

**Section C. Type II Supporting Organizations**

- 1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).

|   | Yes | No |
|---|-----|----|
| 1 |     |    |

**Section D. All Type III Supporting Organizations**

- 1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year: (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?
- 2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s), or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).
- 3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.

|   | Yes | No |
|---|-----|----|
| 1 |     |    |
| 2 |     |    |
| 3 |     |    |

**Section E. Type III Functionally Integrated Supporting Organizations**

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).

- a ☐ The organization satisfied the Activities Test. Complete line 2 below.
- b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.
- c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).

2 Activities Test. Answer lines 2a and 2b below.

- a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.
- b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.

3 Parent of Supported Organizations. Answer lines 3a and 3b below.

- a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI.
- b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.

|    | Yes | No |
|----|-----|----|
| 2a |     |    |
| 2b |     |    |
| 3a |     |    |
| 3b |     |    |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

**Section A – Adjusted Net Income**

|  |   | (A) Prior Year | (B) Current Year (optional) |
|--|---|----------------|-----------------------------|
| 1 Net short term capital gain  | 1 |                |                             |
| 2 Recoveries of prior year distributions   | 2 |                |                             |
| 3 Other gross income (see instructions)  | 3 |                |                             |
| 4 Add lines 1 through 3  | 4 |                |                             |
| 5 Depreciation and depletion   | 5 |                |                             |
| 6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | 6 |                |                             |
| 7 Other expenses (see instructions)  | 7 |                |                             |
| 8 <b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)  | 8 |                |                             |

**Section B – Minimum Asset Amount**

|  |    | (A) Prior Year | (B) Current Year (optional) |
|--|----|----------------|-----------------------------|
| 1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year) |    |                |                             |
| a Average monthly value of securities  | 1a |                |                             |
| b Average monthly cash balances  | 1b |                |                             |
| c Fair market value of other non-exempt-use assets   | 1c |                |                             |
| d <b>Total</b> (add lines 1a, 1b, and 1c)  | 1d |                |                             |
| e <b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI).  |    |                |                             |
| 2 Acquisition indebtedness applicable to non-exempt-use assets   | 2  |                |                             |
| 3 Subtract line 2 from line 1d.  | 3  |                |                             |
| 4 First deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions)                                 | 4  |                |                             |
| 5 Net value of non-exempt-use assets (subtract line 4 from line 3)   | 5  |                |                             |
| 6 Multiply line 5 by 0.035.  | 6  |                |                             |
| 7 Recoveries of prior-year distributions   | 7  |                |                             |
| 8 <b>Minimum Asset Amount</b> (add line 7 to line 6)   | 8  |                |                             |

**Section C – Distributable Amount**

|  |   |  | Current Year |
|--|---|--|--------------|
| 1 Adjusted net income for prior year (from Section A, line 8, column A)  | 1 |  |              |
| 2 Enter 0.85 of line 1   | 2 |  |              |
| 3 Minimum asset amount for prior year (from Section B, line 8, column A)   | 3 |  |              |
| 4 Enter greater of line 2 or line 3  | 4 |  |              |
| 5 Income tax imposed in prior year   | 5 |  |              |
| 6 <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) | 6 |  |              |

- 7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions)

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Schedule A (Form 990) 2024

**Part V** | **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)**Section D – Distributions**

|    |   | Current Year |
|----|---|--------------|
| 1  | Amounts paid to supported organizations to accomplish exempt purposes   | 1            |
| 2  | Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity             | 2            |
| 3  | Administrative expenses paid to accomplish exempt purposes of supported organizations   | 3            |
| 4  | Amounts paid to acquire exempt-use assets   | 4            |
| 5  | Qualified set-aside amounts (prior IRS approval required – provide details in <b>Part VI</b> )  | 5            |
| 6  | Other distributions (describe in <b>Part VI</b> ). See instructions   | 6            |
| 7  | <b>Total annual distributions.</b> Add lines 1 through 6  | 7            |
| 8  | Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions | 8            |
| 9  | Distributable amount for 2024 from Section C, line 6  | 9            |
| 10 | Line 8 amount divided by line 9 amount  | 10           |

**Section E – Distribution Allocations** (see instructions)

|   | (i)<br>Excess<br>Distributions   | (ii)<br>Underdistributions<br>Pre-2024 | (iii)<br>Distributable<br>Amount for 2024 |
|---|--|--|---|
| 1 | Distributable amount for 2024 from Section C, line 6   |  |   |
| 2 | Underdistributions, if any, for years prior to 2024 (reasonable cause required – explain in <b>Part VI</b> ). See instructions   |  |   |
| 3 | Excess distributions carryover, if any, to 2024  |  |   |
| a | From 2019  |  |   |
| b | From 2020  |  |   |
| c | From 2021  |  |   |
| d | From 2022  |  |   |
| e | From 2023  |  |   |
| f | Total of lines 3a through 3e   |  |   |
| g | Applied to underdistributions of prior years   |  |   |
| h | Applied to 2024 distributable amount   |  |   |
| i | Carryover from 2019 not applied (see instructions)   |  |   |
| j | Remainder. Subtract lines 3g, 3h, and 3i from line 3f  |  |   |
| 4 | Distributions for 2024 from Section D, line 7 \$   |  |   |
| a | Applied to underdistributions of prior years   |  |   |
| b | Applied to 2024 distributable amount   |  |   |
| c | Remainder. Subtract lines 4a and 4b from line 4.   |  |   |
| 5 | Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in <b>Part VI</b> . See instructions |  |   |
| 6 | Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in <b>Part VI</b> . See instructions                        |  |   |
| 7 | <b>Excess distributions carryover to 2025.</b> Add lines 3j and 4c   |  |   |
| 8 | Breakdown of line 7  |  |   |
| a | Excess from 2020   |  |   |
| b | Excess from 2021   |  |   |
| c | Excess from 2022   |  |   |
| d | Excess from 2023   |  |   |
| e | Excess from 2024   |  |   |

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Schedule A (Form 990) 2024

**Part VI**

**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

**Schedule B  
(Form 990)**

(For December 2024)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

Attach to Form 990, 990-EZ, or 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

Name of the organization

Employer identification number

UNITED WAY OF SOUTH SARASOTA COUNTY INC

59-1100846

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)( 3 ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- ☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization

UNITED WAY OF SOUTH SARASOTA COUNTY INC

Employer identification number

59-1100846

**Part I** Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                  | (c)<br>Total contributions | (d)<br>Type of contribution   |
|------------|--|----------------------------|---|
| 1          | PUBLIX SUPERMARKETS<br>PO BOX 407<br>LAKELAND, FL 33802            | \$ 129,849.                | Person <input type="checkbox"/><br>Payroll <input checked="" type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| 2          | BARNETT FAMILY GRANT<br>VENICE<br>VENICE, FL 34292                 | \$ 31,970.                 | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| 3          | FIFTH THIRD FOUNDATION<br>4242 S TAMIAMI TRAIL<br>VENICE, FL 34293 | \$ 50,000.                 | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
|            |  |                            | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |  |                            | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
|            |  |                            | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |



Name of organization

Employer identification number

UNITED WAY OF SOUTH SARASOTA COUNTY INC

59-1100846

**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|---------------------------|--|---|----------------------|
|                           | N/A  |   |                      |
|                           |  | \$  |                      |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                           |  | \$  |                      |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                           |  | \$  |                      |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                           |  | \$  |                      |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                           |  | \$  |                      |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                           |  | \$  |                      |
| (a) No.<br>from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                           |  | \$  |                      |

Name of organization

UNITED WAY OF SOUTH SARASOTA COUNTY INC

Employer identification number

59-1100846

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) \$ \_\_\_\_\_ N/A

Use duplicate copies of Part III if additional space is needed.

| (a) No.<br>from<br>Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---------------------------|---------------------|-----------------|-------------------------------------|
|                           | N/A                 |                 |                                     |
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |

## (e) Transfer of gift

Transferee's name, address, and ZIP + 4

Relationship of transferor to transferee

| (a) No.<br>from<br>Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---------------------------|---------------------|-----------------|-------------------------------------|
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |

## (e) Transfer of gift

Transferee's name, address, and ZIP + 4

Relationship of transferor to transferee

| (a) No.<br>from<br>Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---------------------------|---------------------|-----------------|-------------------------------------|
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |

## (e) Transfer of gift

Transferee's name, address, and ZIP + 4

Relationship of transferor to transferee

| (a) No.<br>from<br>Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---------------------------|---------------------|-----------------|-------------------------------------|
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |
|                           |                     |                 |                                     |

## (e) Transfer of gift

Transferee's name, address, and ZIP + 4

Relationship of transferor to transferee

**SCHEDULE D  
(Form 990)**

(Rev. December 2024)

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**Open to Public  
Inspection**

Name of the organization

Employer identification number

UNITED WAY OF SOUTH SARASOTA COUNTY INC

59-1100846

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts**

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

|   | (a) Donor advised funds      | (b) Funds and other accounts |
|---|------------------------------|------------------------------|
| 1 Total number at end of year   |                              |                              |
| 2 Aggregate value of contributions to (during year)   |                              |                              |
| 3 Aggregate value of grants from (during year)  |                              |                              |
| 4 Aggregate value at end of year  |                              |                              |
| 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No  |
| 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? | <input type="checkbox"/> Yes | <input type="checkbox"/> No  |

**Part II Conservation Easements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply):

|   |   |
|---|---|
| <input type="checkbox"/> Preservation of land for public use (for example, recreation or education) | <input type="checkbox"/> Preservation of a historically important land area |
| <input type="checkbox"/> Protection of natural habitat  | <input type="checkbox"/> Preservation of a certified historic structure     |
| <input type="checkbox"/> Preservation of open space   |   |

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

|  | Held at the End of the Tax Year |
|--|---------------------------------|
| a Total number of conservation easements   | 2a                              |
| b Total acreage restricted by conservation easements   | 2b                              |
| c Number of conservation easements on a certified historic structure included on line 2a   | 2c                              |
| d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register | 2d                              |

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year \_\_\_\_\_

4 Number of states where property subject to conservation easement is located \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements \_\_\_\_\_

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

|   |          |
|---|----------|
| (i) Revenue included on Form 990, Part VIII, line 1 | \$ _____ |
| (ii) Assets included in Form 990, Part X            | \$ _____ |

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

|   |          |
|---|----------|
| a Revenue included on Form 990, Part VIII, line 1 | \$ _____ |
| b Assets included in Form 990, Part X             | \$ _____ |

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

- a ☐ Public exhibition  
 b ☐ Scholarly research  
 c ☐ Preservation for future generations  
 d ☐ Loan or exchange program  
 e ☐ Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table.

|    | Amount |
|----|--------|
| 1c |        |
| 1d |        |
| 1e |        |
| 1f |        |

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII. ☐

**Part V Endowment Funds**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

|  | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance                     |                  |                |                    |                      |                     |
| b Contributions                                  |                  |                |                    |                      |                     |
| c Net investment earnings, gains, and losses     |                  |                |                    |                      |                     |
| d Grants or scholarships                         |                  |                |                    |                      |                     |
| e Other expenditures for facilities and programs |                  |                |                    |                      |                     |
| f Administrative expenses                        |                  |                |                    |                      |                     |
| g End of year balance                            |                  |                |                    |                      |                     |

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment \_\_\_\_\_ %

b Permanent endowment \_\_\_\_\_ %

c Term endowment \_\_\_\_\_ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations? \_\_\_\_\_

(ii) Related organizations? \_\_\_\_\_

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? \_\_\_\_\_

|        | Yes | No |
|--------|-----|----|
| 3a(i)  |     |    |
| 3a(ii) |     |    |
| 3b     |     |    |

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property   | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land   |                                      | 12,250.                         |                              | 12,250.        |
| b Buildings   |                                      |                                 |                              |                |
| c Leasehold improvements  |                                      | 176,269.                        | 36,156.                      | 140,113.       |
| d Equipment   |                                      | 26,351.                         | 18,555.                      | 7,796.         |
| e Other   |                                      | 6,410.                          | 1,344.                       | 5,066.         |
| <b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, line 10c, column (B)). |                                      |                                 |                              | 165,225.       |

BAA

Schedule D (Form 990) (Rev. 12-2024)

**Part VII Investments – Other Securities**

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

| (a) Description of security or category (including name of security)  | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
|---|----------------|---|
| (1) Financial derivatives   |                |   |
| (2) Closely held equity interests                                     |                |   |
| (3) Other   |                |   |
| (A) _____   |                |   |
| (B) _____   |                |   |
| (C) _____   |                |   |
| (D) _____   |                |   |
| (E) _____   |                |   |
| (F) _____   |                |   |
| (G) _____   |                |   |
| (H) _____   |                |   |
| Total. (Column (b) must equal Form 990, Part X, line 12, column (B)). |                |   |

**Part VIII Investments – Program Related**

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

| (a) Description of investment   | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
|---|----------------|---|
| (1) _____   |                |   |
| (2) _____   |                |   |
| (3) _____   |                |   |
| (4) _____   |                |   |
| (5) _____   |                |   |
| (6) _____   |                |   |
| (7) _____   |                |   |
| (8) _____   |                |   |
| (9) _____   |                |   |
| Total. (Column (b) must equal Form 990, Part X, line 13, column (B)). |                |   |

**Part IX Other Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

| (a) Description   | (b) Book value |
|---|----------------|
| (1) FIDELITY INVESTMENTS  | 1,250,656.     |
| (2) _____   |                |
| (3) _____   |                |
| (4) _____   |                |
| (5) _____   |                |
| (6) _____   |                |
| (7) _____   |                |
| (8) _____   |                |
| (9) _____   |                |
| Total. (Column (b) must equal Form 990, Part X, line 15, column (B)). |                |

**Part X Other Liabilities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

| (a) Description of liability | (b) Book value |
|------------------------------|----------------|
| 1. (1) Federal income taxes  |                |
| (2) _____                    |                |
| (3) _____                    |                |
| (4) _____                    |                |
| (5) _____                    |                |
| (6) _____                    |                |
| (7) _____                    |                |
| (8) _____                    |                |
| (9) _____                    |                |

Total. (Column (b) must equal Form 990, Part X, line 25, column (B)).

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII. ☐

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|   |   |    |    |            |
|---|---|----|----|------------|
| 1 | Total revenue, gains, and other support per audited financial statements        |    | 1  | 2,880,087. |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12:             |    |    |            |
|   | a Net unrealized gains (losses) on investments                                  | 2a |    |            |
|   | b Donated services and use of facilities  | 2b |    |            |
|   | c Recoveries of prior year grants   | 2c |    |            |
|   | d Other (Describe in Part XIII.)  | 2d |    |            |
|   | e Add lines 2a through 2d   |    | 2e |            |
| 3 | Subtract line 2e from line 1.   |    | 3  | 2,880,087. |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1:            |    |    |            |
|   | a Investment expenses not included on Form 990, Part VIII, line 7b              | 4a |    |            |
|   | b Other (Describe in Part XIII.)  | 4b |    |            |
|   | c Add lines 4a and 4b   |    | 4c |            |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) |    | 5  | 2,880,087. |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|   |  |    |    |            |
|---|--|----|----|------------|
| 1 | Total expenses and losses per audited financial statements                       |    | 1  | 3,313,894. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25:                |    |    |            |
|   | a Donated services and use of facilities   | 2a |    |            |
|   | b Prior year adjustments   | 2b |    |            |
|   | c Other losses   | 2c |    |            |
|   | d Other (Describe in Part XIII.)   | 2d |    |            |
|   | e Add lines 2a through 2d  |    | 2e |            |
| 3 | Subtract line 2e from line 1.  |    | 3  | 3,313,894. |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1:               |    |    |            |
|   | a Investment expenses not included on Form 990, Part VIII, line 7b               | 4a |    |            |
|   | b Other (Describe in Part XIII.)   | 4b |    |            |
|   | c Add lines 4a and 4b  |    | 4c |            |
| 5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) |    | 5  | 3,313,894. |

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**SCHEDULE G**  
**(Form 990)**

(Rev. December 2024)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information Regarding Fundraising or Gaming Activities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19; or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**Open to Public  
Inspection**

Name of the organization

Employer identification number

**UNITED WAY OF SOUTH SARASOTA COUNTY INC**

**59-1100846**

**Part I**

**Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- |   |   |
|---|---|
| <input type="checkbox"/> a Mail solicitations               | <input type="checkbox"/> e Solicitation of nongovernment grants |
| <input type="checkbox"/> b Internet and email solicitations | <input type="checkbox"/> f Solicitation of government grants    |
| <input type="checkbox"/> c Phone solicitations              | <input type="checkbox"/> g Special fundraising events           |
| <input type="checkbox"/> d In-person solicitations          |   |

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☐ Yes ☒ No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did fundraiser have custody or control of contributions? |    | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
|---|---------------|--|----|-----------------------------------|---|---|
|   |               | Yes  | No |                                   |   |   |
| 1   |               |  |    |                                   |   |   |
| 2   |               |  |    |                                   |   |   |
| 3   |               |  |    |                                   |   |   |
| 4   |               |  |    |                                   |   |   |
| 5   |               |  |    |                                   |   |   |
| 6   |               |  |    |                                   |   |   |
| 7   |               |  |    |                                   |   |   |
| 8   |               |  |    |                                   |   |   |
| 9   |               |  |    |                                   |   |   |
| 10  |               |  |    |                                   |   |   |
| <b>Total</b>  |               |  |    |                                   |   | 0.  |

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

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**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

|                 |    | (a) Event #1<br>CELEBRITY SOFT<br>(event type)                | (b) Event #2<br>(event type) | (c) Other events<br>NONE<br>(total number) | (d) Total events<br>(add col. (a)<br>through col. (c)) |
|-----------------|----|---|------------------------------|--|--|
|                 |    |   |                              |  |  |
| Revenue         | 1  | Gross receipts  | 59,459.                      |  | 59,459.  |
|                 | 2  | Less: Contributions   |                              |  |  |
|                 | 3  | Gross income (line 1 minus line 2)                            | 59,459.                      |  | 59,459.  |
| Direct Expenses | 4  | Cash prizes   |                              |  |  |
|                 | 5  | Noncash prizes  |                              |  |  |
|                 | 6  | Rent/facility costs   |                              |  |  |
|                 | 7  | Food and beverages  |                              |  |  |
|                 | 8  | Entertainment   |                              |  |  |
|                 | 9  | Other direct expenses   | 49,429.                      |  | 49,429.  |
|                 | 10 | Direct expense summary. Add lines 4 through 9 in column (d).  |                              |  | 49,429.  |
|                 | 11 | Net income summary. Subtract line 10 from line 3, column (d). |                              |  | 10,030.  |

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

|                 |   | (a) Bingo   | (b) Full taps/instant<br>bingo/progressive<br>bingo | (c) Other gaming  | (d) Total gaming<br>(add col. (a)<br>through col. (c)) |
|-----------------|---|---|---|-------------------|--|
|                 |   |   |   |                   |  |
| Revenue         | 1 | Gross revenue   |   |                   |  |
|                 | 2 | Cash prizes   |   |                   |  |
| Direct Expenses | 3 | Noncash prizes  |   |                   |  |
|                 | 4 | Rent/facility costs   |   |                   |  |
|                 | 5 | Other direct expenses   |   |                   |  |
|                 | 6 | Volunteer labor...  | Yes _____ %<br>No                                   | Yes _____ %<br>No | Yes _____ %<br>No                                      |
|                 | 7 | Direct expense summary. Add lines 2 through 5 in column (d).        |   |                   |  |
|                 | 8 | Net gaming income summary. Subtract line 7 from line 1, column (d). |   |                   |  |

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states? \_\_\_\_\_ ☐ Yes ☐ No

b If "No," explain: \_\_\_\_\_

10 a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? \_\_\_\_\_ ☐ Yes ☐ No

b If "Yes," explain: \_\_\_\_\_

- 11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12 Is the organization a grantor, beneficiary, or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

a The organization's facility

13a %

b An outside facility

13b %

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name

Address

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization \$ and the amount of gaming revenue retained by the third party \$

c If "Yes," enter the name and address of the third party:

Name

Address

16 Gaming manager information:

Name

Gaming manager compensation \$

Description of services provided

☐ Director/officer

☐ Employee

☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$

**Part IV** **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

**SCHEDULE I**  
**(Form 990)**

(Rev. December 2024)

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**Open to Public  
Inspection**

Name of the organization

UNITED WAY OF SOUTH SARASOTA COUNTY INC

Employer identification number

59-1100846

**Part I General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes

☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

SEE PART IV

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

| 1 (a) Name and address of organization or government  | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
|---|---------|---------------------------------|--------------------------|----------------------------------|---|---------------------------------------|------------------------------------|
| (1) CHARLOTTE HIV/AIDS PPL SUPPOR<br>18200 PAULSON DR UNIT A1-2<br>PORT CHARLOTTE, FL 33954 |         |                                 | 15,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (2) FAMILY PROMISE OF SARASOTA<br>8499 S TAMIA MI TR PMB 267<br>SARASOTA, FL 34235          |         |                                 | 20,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (3) GOOD SAMARITAN PHARMACY<br>2502 N TAMIA MI TRAIL<br>NOKOMIS, FL 34275                   |         |                                 | 25,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (4) NORTH PORT MEALS ON WHEELS<br>13624 TAMIA MI TR<br>NORTH PORT, FL 34287                 |         |                                 | 25,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (5) LITERACY VOLUNTEERS OF SOUTH<br>13800 TAMIA MI TR<br>NORTH PORT, FL 34287               |         |                                 | 20,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (6) TEEN COURT OF SARASOTA, INC.<br>2071 RINGLING BLVD 2ND FLOOR<br>SARASOTA, FL 34237      |         |                                 | 8,000.                   | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (7) THE TWIG CARES, INC.<br>826 PINEBROKE ROAD<br>VENICE, FL 34285                          |         |                                 | 15,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |
| (8) ON THE SPOT AID<br>12161 MERCADO DR<br>VENICE, FL 34293                                 |         |                                 | 20,000.                  | 0.                               |   |                                       | LOCAL ASSISTANCE ALLOCATION        |

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

23

3 Enter total number of other organizations listed in the line 1 table

0

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

TEEA3901L 11/13/24

Schedule I (Form 990) (Rev. 12-2024)

**Part III** **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance       | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of noncash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------------|--------------------------|--------------------------|----------------------------------|---|---------------------------------------|
| 1 RENT/UTILITIES AND OTHER ASSISTANCE | 18                       |                          |                                  |   |                                       |
| 2                                     |                          |                          |                                  |   |                                       |
| 3                                     |                          |                          |                                  |   |                                       |
| 4                                     |                          |                          |                                  |   |                                       |
| 5                                     |                          |                          |                                  |   |                                       |
| 6                                     |                          |                          |                                  |   |                                       |
| 7                                     |                          |                          |                                  |   |                                       |

**Part IV** **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.**PART I, LINE 2 - PROCEDURES FOR MONITORING USE OF GRANTS FUNDS IN U.S.**

AT THE END OF EACH CALENDAR YEAR, THE BOARD TAKES REQUESTS FOR COMMUNITY IMPACT GRANTS FROM OTHER COMMUNITY 501(C) (3) ORGANIZATIONS, IF A GRANT WAS PROVIDED IN THE CURRENT YEAR, THE GRANTEE MUST SHOW THE RESULTS FROM WHAT THE GRANTEE PROPOSED TO USE THE GRANT FUNDS FOR BEFORE RECEIVING A GRANT FOR THE UPCOMING CALENDAR YEAR.

**SCHEDULE M  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.

Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2024**

**Open to Public  
Inspection**

Name of the organization

Employer identification number

UNITED WAY OF SOUTH SARASOTA COUNTY INC

59-1100846

**Part I** Types of Property

|   | (a)<br>Check if<br>applicable | (b)<br>Number of<br>contributions or<br>items contributed | (c)<br>Noncash contribution<br>amounts reported<br>on Form 990,<br>Part VIII, line 1g | (d)<br>Method of determining<br>noncash contribution amounts |
|---|-------------------------------|---|---|--|
| 1 Art – Works of art  |                               |   |   |  |
| 2 Art – Historical treasures                                    |                               |   |   |  |
| 3 Art – Fractional interests                                    |                               |   |   |  |
| 4 Books and publications  |                               |   |   |  |
| 5 Clothing and household goods.                                 |                               |   |   |  |
| 6 Cars and other vehicles                                       |                               |   |   |  |
| 7 Boats and planes  |                               |   |   |  |
| 8 Intellectual property   |                               |   |   |  |
| 9 Securities – Publicly traded                                  |                               |   |   |  |
| 10 Securities – Closely held stock                              |                               |   |   |  |
| 11 Securities – Partnership, LLC, or trust interests            |                               |   |   |  |
| 12 Securities – Miscellaneous.                                  |                               |   |   |  |
| 13 Qualified conservation contribution –<br>Historic structures |                               |   |   |  |
| 14 Qualified conservation contribution – Other                  |                               |   |   |  |
| 15 Real estate – Residential                                    |                               |   |   |  |
| 16 Real estate – Commercial                                     |                               |   |   |  |
| 17 Real estate – Other  |                               |   |   |  |
| 18 Collectibles   |                               |   |   |  |
| 19 Food inventory   |                               |   |   |  |
| 20 Drugs and medical supplies                                   |                               |   |   |  |
| 21 Taxidermy  |                               |   |   |  |
| 22 Historical artifacts   |                               |   |   |  |
| 23 Scientific specimens   |                               |   |   |  |
| 24 Archeological artifacts                                      |                               |   |   |  |
| 25 Other (CONTRIBUTIONS )                                       |                               |   | 0.  |  |
| 26 Other (IN KIND LABOR )                                       |                               |   |   |  |
| 27 Other (AND ITEMS )   |                               | 100   | 1,004,870.  | HOURS WORKED   |
| 28 Other ( )  |                               |   |   |  |

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported on Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?

b If "Yes," describe the arrangement in Part II

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If "Yes," describe in Part II

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II

Yes No

30 a

X

31

X

32 a

X

**Part II** **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

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**SCHEDULE O**  
**(Form 990)**

(Rev. December 2024)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**Open to Public  
Inspection**

Name of the organization

UNITED WAY OF SOUTH SARASOTA COUNTY INC

Employer identification number

59-1100846

**FORM 990, PART I, LINE 1 - ORGANIZATION MISSION OR SIGNIFICANT ACTIVITIES**

THE UNITED WAY OF SOUTH SARASOTA COUNTY, INC. (THE "ORGANIZATION") IS A NOT-FOR-PROFIT ORGANIZATION FORMED UNDER INTERNAL REVENUE CODE SECTION 501 ( C ) (3) AND IS LOCATED IN VENICE, FLORIDA. THE UNITED WAY HAS ADOPTED A MODERN UNITED WAY MODEL, TRANSITIONING AWAY FROM BEING A PASSTHROUGH-ONLY ORGANIZATION TO A MODEL THAT ALSO EMBRACES PROVIDING DIRECT SERVICES TO THOSE IN NEED IN THE LOCAL AREA OF VENICE, NORTH PORT, NOKOMIS, LAUREL, ENGLEWOOD, AND OSPREY, FLORIDA. THE ORGANIZATION IS A PARTNER WITH THE SARASOTA COUNTY SHERIFFS EVICTION MITIGATION TASKFORCE, THE INTERNAL REVENUE SERVICE VOLUNTEER TAX ASSISTANCE PROGRAM, AND SARASOTA COUNTY EMERGENCY SERVICE. IT IS RECOGNIZED BY FEMA AND THE STATE OF FLORIDA AS THE SARASOTA COUNTY LONG-TERM RECOVERY GROUP LEADER IN TIMES OF DISASTER.

**FORM 990, PART III, LINE 1 - ORGANIZATION MISSION**

THE UNITED WAY OF SOUTH SARASOTA COUNTY, INC. (THE "ORGANIZATION") IS A NOT-FOR-PROFIT ORGANIZATION FORMED UNDER INTERNAL REVENUE CODE SECTION 501 ( C ) (3) AND IS LOCATED IN VENICE, FLORIDA. THE UNITED WAY HAS ADOPTED A MODERN UNITED WAY MODEL, TRANSITIONING AWAY FROM BEING A PASSTHROUGH-ONLY ORGANIZATION TO A MODEL THAT ALSO EMBRACES PROVIDING DIRECT SERVICES TO THOSE IN NEED IN THE LOCAL AREA OF VENICE, NORTH PORT, NOKOMIS, LAUREL, ENGLEWOOD, AND OSPREY, FLORIDA. THE ORGANIZATION IS A PARTNER WITH THE SARASOTA COUNTY SHERIFFS EVICTION MITIGATION TASKFORCE, THE INTERNAL REVENUE SERVICE VOLUNTEER TAX ASSISTANCE PROGRAM, AND SARASOTA COUNTY EMERGENCY SERVICE. IT IS RECOGNIZED BY FEMA AND THE STATE OF FLORIDA AS THE SARASOTA COUNTY LONG-TERM RECOVERY GROUP LEADER IN TIMES OF DISASTER.

**FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS**

MANAGEMENT ANNUALLY REVIEWS ITS TAX POSITIONS AND HAS DETERMINED THAT THERE ARE NO MATERIAL UNCERTAIN TAX POSITIONS THAT REQUIRE RECOGNITION IN THE FINANCIAL STATEMENTS.



**SCHEDULE O**  
**(Form 990)**

(Rev. December 2024)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**Open to Public  
Inspection**

Name of the organization

Employer identification number

UNITED WAY OF SOUTH SARASOTA COUNTY INC

59-1100846

**FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS**

ANNUAL DISCLOSURE MONITORED BY THE BOARD OF DIRECTORS

**FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS - CEO & TOP MANAGEMENT**

BOARD ANNUALLY REVIEWS PERFORMANCE AND COMPENSATION OF ALL TOP MANAGEMENT AND  
EXECUTIVES.

**FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE**

NO OTHER DOCUMENTS AVAILABLE TO THE PUBLIC.

707395

(Requestor's Name)

(Address)

(Address)

(City/State/Zip/Phone #)

☐ PICK-UP

☐ WAIT

☐ MAIL

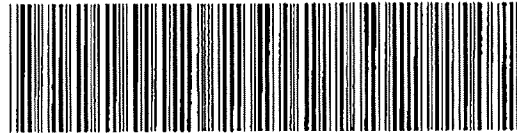
(Business Entity Name)

(Document Number)

Certified Copies \_\_\_\_\_ Certificates of Status \_\_\_\_\_

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TALLAHASSEE, FL

S. ROBERTS

MAR 12 2025

**COVER LETTER**

TO: Amendment Section  
Division of Corporations

NAME OF CORPORATION: United Way of South Sarasota County, Inc.

DOCUMENT NUMBER: 707395

The enclosed *Articles of Amendment* and fee are submitted for filing.

Please return all correspondence concerning this matter to the following:

Barbara Cruz

(Name of Contact Person)

United Way of South Sarasota County, Inc.

(Firm/ Company)

4242 S Tamiami Trail

(Address)

Venice, Florida 34293

(City/ State and Zip Code)

bacruz@uwscc.org

E-mail address: (to be used for future annual report notification)

For further information concerning this matter, please call:

Barbara Cruz

941

484-4811

at

(Name of Contact Person)

(Area Code)

(Daytime Telephone Number)

Enclosed is a check for the following amount made payable to the Florida Department of State:

- |   |  |   |   |
|---|--|---|---|
| <input checked="" type="checkbox"/> \$35 Filing Fee | <input type="checkbox"/> \$43.75 Filing Fee &<br>Certificate of Status | <input type="checkbox"/> \$43.75 Filing Fee &<br>Certified Copy<br>(Additional copy is<br>enclosed) | <input checked="" type="checkbox"/> \$52.50 Filing Fee<br>Certificate of Status<br>Certified Copy<br>(Additional Copy is<br>Enclosed) |
|---|--|---|---|

**Mailing Address**

Amendment Section  
Division of Corporations  
P.O. Box 6327  
Tallahassee, FL 32314

**Street Address**

Amendment Section  
Division of Corporations  
The Centre of Tallahassee  
2415 N. Monroe Street, Suite 810  
Tallahassee, FL 32303

RESTATED ARTICLES OF INCORPORATION  
OF  
THE UNITED WAY OF SOUTH SARASOTA COUNTY, INC.

Pursuant to the provisions of Chapter 617 of the Florida Statutes, this Florida Not For Profit Corporation does hereby adopt the following amended and restated Articles of Incorporation.

ARTICLE I - NAME

1.1 The name of the corporation is The United Way of South Sarasota County, Inc., hereinafter referred to as (the "UWSSC").

ARTICLE II – PRINCIPAL OFFICE

2.1 The principal office and mailing address is 4242 S. Tamiami Trail, Venice, Florida 34293.

ARTICLE III - PURPOSE

3.1 The purpose for which the corporation is organized is:

a) To conduct a yearly fund-raising campaign and to receive by gift, grant, devise, bequest or otherwise and from any private or public source or sources, personal or real property. To hold, administer, invest, reinvest, manage, disburse and distribute and apply the income and/or principal of the funds according to the directions and intent of the donor or donors of such property, so much as that can be accomplished and, in the absence of such directions, as UWSSC determines. UWSSC specifically reserves the right to refuse any gift or donation, or to accept a gift or donation subject to any conditions UWSSC imposes, including requiring a complete series of environmental tests (real property) at donor's expense.

b) To develop the financial resources needed to meet the human services needs of the community, to assist in identifying governmental sources of assistance, and to attempt to reduce the number of requests necessary for financial support for services.

c) To deploy financial support, collaborative mentoring, training, and other assistance, maximizing the resources available to agencies for services aimed at the needs of the community, including those supplied by organizations not receiving United Way funding.

d) To provide programs and direct services meeting the needs of the community in which we serve, intending to fill the gaps in services needed but not provided by other agencies.

#### ARTICLE IV – MANNER OF ELECTION

- 4.1 The manner in which the directors are elected and appointed are as provided for in the Bylaws.

#### ARTICLE V – INITIAL OFFICERS AND/OR DIRECTORS

Barbara Cruz, President and CEO  
4242 S. Tamiami Trail  
Venice, FL 34293

Doug Di Virgilio, Board Chair  
4242 S. Tamiami Trail  
Venice, FL 34293

Kristen Myers, Vice Chair  
4242 S. Tamiami Trail  
Venice, FL 34293

Paddy Padmanabhan Treasurer  
4242 S. Tamiami Trail  
Venice, FL 34293

#### ARTICLE VI – REGISTERED AGENT

- 5.1 The name and Florida street address of the registered agent is:

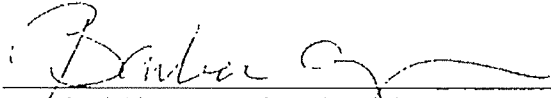
Barbara Cruz  
4242 S. Tamiami Trail  
Venice, FL 34293

#### ARTICLE VII – INCORPORATOR

- 6.1 The name and address of the Incorporator is:

Barbara Cruz  
4242 S. Tamiami Trail  
Venice, FL 34293

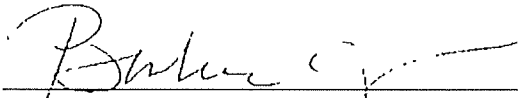
*Having been named as registered agent to accept service of process for the above stated corporation at the place designated in this certificate, I am familiar with and accept the appointment as registered agent and agree to act in this capacity.*



Required Signature of Registered Agent

1/29/25  
Date

*I submit this document and affirm that the facts stated herein are true. I am aware that any false information submitted in a document to the Department of State constitutes a third degree felony as provided for in s.817.155, F.S.*



Required Signature of Incorporator

1/29/25  
Date

**2025 FLORIDA NOT FOR PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# 707395

**Entity Name:** UNITED WAY OF SOUTH SARASOTA COUNTY, INC.

**Current Principal Place of Business:**

4242 S TAMIAMI TRL  
VENICE, FL 34293

**Current Mailing Address:**

4242 S TAMIAMI TRL  
VENICE, FL 34293 US

**FEI Number:** 59-1100846

**Certificate of Status Desired:** No

**Name and Address of Current Registered Agent:**

BARBARA, CRUZ  
4242 S TAMIAMI TRL  
VENICE, FL 34293 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

**SIGNATURE:** BARBARA CRUZ

01/13/2025

Electronic Signature of Registered Agent

Date

**Officer/Director Detail :**

Title            PRESIDENT AND CEO  
Name            CRUZ, BARBARA  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            SECRETARY  
Name            CARNEY, NICOLE  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            CHAIRMAN  
Name            DIVIRGILIO, DOUG  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            TREASURER  
Name            PADMANABHAN, PADDY  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            VC  
Name            MYERS, KRISTEN  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

*I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 617, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.*

**SIGNATURE:** BARBARA CRUZ

PRESIDENT/CEO

01/13/2025

Electronic Signature of Signing Officer/Director Detail

Date

## Cart (4 items)

[Remove All Items](#) [My Saved Items](#)

Items

Quantity

Price



Dell Pro Wireless  
Keyboard and Mouse –  
KM5221W

–  +


[Remove items](#)


[Save for later](#)

**\$89.98**

Tech Specs



Delivery to **90001** 

Free Standard delivery as soon as **Saturday, August 16** 



Dell 14 Plus Laptop

[Save for later](#)

–  +

[Remove items](#)

~~\$2,597.98~~

 **-\$700.00**

**\$1,897.98**

Tech Specs





**2025 FLORIDA NOT FOR PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# 707395

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VENICE, FL 34293 US

**FEI Number: 59-1100846**

**Certificate of Status Desired: No**

**Name and Address of Current Registered Agent:**

BARBARA, CRUZ  
4242 S TAMIAMI TRL  
VENICE, FL 34293 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

**SIGNATURE: BARBARA CRUZ**

**01/13/2025**

Electronic Signature of Registered Agent

Date

**Officer/Director Detail :**

Title            PRESIDENT AND CEO  
Name            CRUZ, BARBARA  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            SECRETARY  
Name            CARNEY, NICOLE  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            CHAIRMAN  
Name            DIVIRGILIO, DOUG  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            TREASURER  
Name            PADMANABHAN, PADDY  
Address        4242 S TAMIAMI TRL  
City-State-Zip: VENICE FL 34293

Title            VC  
Name            MYERS, KRISTEN  
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**SIGNATURE: BARBARA CRUZ**

**PRESIDENT/CEO**

**01/13/2025**

Electronic Signature of Signing Officer/Director Detail

Date