

› We're Better Together.

UWBA Policies and Procedures for Personal Giving Accounts

HOW DOES THIS WORK?

We distribute individual customized checks for your designations. We create an individual check and send it to the organization you designate; the check indicates the name of the donor. Distribution requests received between the 15th of month one and the 15th of month two will be paid at the end of month two. The minimum distribution amount is \$200.

WHAT REPORTING WILL I RECEIVE?

You will receive quarterly statements to track your Personal Giving Account.

TO WHOM CAN UWBA MAKE DISTRIBUTIONS?

- Charitable organizations described in Section 170(b)(1)(A) of the Internal Revenue Code including private operating foundations (this includes most public charities, religious, educational, hospital or research nonprofit organizations).
- Donor advised funds

WHEN CAN'T UWBA HONOR MY DISTRIBUTION REQUEST?

Charitable giving regulations (Pension Protection Act - H.R. 4) require that

distributions from Personal Giving Accounts may not be made:

- In fulfillment of a pre-existing written pledge nor
- May the donor receive any goods, services or other private benefit nor
- May the funds be distributed to an individual nor
- For any non-charitable purpose.

WHAT IS THE PROCEDURE FOR DISTRIBUTIONS?

In order to make a distribution to an agency, UWBA must receive instructions from the donor or a designated individual in writing. These instructions may be delivered via fax, regular mail or email. Instructions may be noted on the Donor Request for Distribution of Funds form or any other written record that includes the same information (name and address of organization, dollar amount to be distributed).

Email: PGA@UWBA.org

Fax: (415) 817-4460

Regular mail:
United Way of the Bay Area
Attn: Personal Giving Accounts
221 Main Street, Suite 300
San Francisco, CA 94105

What is a PGA?

In establishing a Personal Giving Account with the United Way of the Bay Area, you are making an irrevocable gift to the United Way of the Bay Area. You may provide instructions to UWBA about further distributions to non-profit agencies. The minimum to establish a PGA is \$5,000 including a required donation to UWBA of \$350.



United Way of the Bay Area