

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

# Form 990

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

Do 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.

# 2024

Open to Public Inspection

**A** For the **2024** calendar year, or tax year beginning and ending

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>UNITED WAY OF SOUTHWEST MICHIGAN</b>		<b>D</b> Employer identification number <b>38-1358411</b>
	Doing business as		<b>E</b> Telephone number <b>269-982-1700</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	<b>PO BOX 288</b>		<b>G</b> Gross receipts \$ <b>4,422,382.</b>
	City or town, state or province, country, and ZIP or foreign postal code <b>ST. JOSEPH, MI 49085</b>		
<b>F</b> Name and address of principal officer: <b>ANNA MURPHY</b> <b>2015 LAKEVIEW AVE., ST. JOSEPH, MI 49085</b>		<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 If "No," attach a list. See instructions <b>H(c)</b> Group exemption number	

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: **WWW.UWSM.ORG**

**K** Form of organization:  Corporation  Trust  Association  Other

**L** Year of formation: **1942** **M** State of legal domicile: **MI**

<b>Part I Summary</b>		Prior Year	Current Year
<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>UNITED WAY OF SOUTHWEST MICHIGAN WORKS IN BERRIEN, CASS, AND VAN BUREN COUNTIES TO SUSTAIN A UNITED</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>14</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>14</b>
	<b>5</b> Total number of individuals employed in calendar year 2024 (Part V, line 2a)	<b>5</b>	<b>22</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>2224</b>
	<b>7 a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>3,996,653.</b>	<b>3,241,961.</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>160,076.</b>	<b>36,664.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>46,206.</b>	<b>99,888.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>0.</b>	<b>0.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>4,202,935.</b>	<b>3,378,513.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>2,948,183.</b>	<b>2,603,630.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>1,648,734.</b>	<b>1,273,569.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>0.</b>	<b>0.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25)	<b>475,873.</b>	
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>865,069.</b>	<b>856,455.</b>
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>5,461,986.</b>	<b>4,733,654.</b>	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>-1,259,051.</b>	<b>-1,355,141.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b> <b>5,843,901.</b>	<b>End of Year</b> <b>4,643,520.</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>1,644,807.</b>	<b>1,738,637.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>4,199,094.</b>	<b>2,904,883.</b>

**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 all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer	Date			
	<b>ANNA MURPHY, PRESIDENT</b> Type or print name and title				
<b>Paid Preparer Use Only</b>	Preparer's name <b>BRIAN HAKE</b>	Preparer's signature <b>BRIAN HAKE</b>	Date <b>11/17/25</b>	Check if self-employed <input type="checkbox"/>	PTIN <b>P01439155</b>
	Firm's name <b>KRUGGEL, LAWTON &amp; COMPANY, LLC</b>	Firm's address <b>526 UPTON DRIVE ST. JOSEPH, MI 49085</b>	Firm's EIN <b>35-1307701</b>	Phone no. <b>269-983-0131</b>	

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: UNITED WAY OF SOUTHWEST MICHIGAN WORKS IN BERRIEN, CASS, AND VAN BUREN COUNTIES TO SUSTAIN A UNITED COMMUNITY WHERE EVERYONE CONTRIBUTES, BELONGS, AND THRIVES.

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

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code: ) (Expenses \$ 3,561,060. including grants of \$ 2,603,630. ) (Revenue \$ 36,664. ) UNITED WAY OF SOUTHWEST MICHIGAN PROVIDED FUNDING TO 74 PROGRAMS AT 48 ORGANIZATIONS THAT SERVE BERRIEN, CASS, AND VAN BUREN COUNTIES. UNITED WAY OF SOUTHWEST MICHIGAN IS CREATING IMPACT THROUGH INVESTMENTS IN THE AREAS OF EARLY EDUCATION & LITERACY, POST-SECONDARY SUCCESS, HEALTHY BODIES, HEALTHY MINDS, FINANCIAL SECURITY, EMPLOYMENT, FOOD SECURITY, AND SAFE ENVIRONMENTS. IN THE SECOND YEAR OF THE FUNDING CYCLE, UNITED WAY OF SOUTHWEST MICHIGAN FUNDING HELPED AREA AGENCIES RECEIVE OVER \$2,000,000 IN LEVERAGED FUNDS AND IMPACTED OVER 143,000 INDIVIDUALS. THE ORGANIZATION ALSO MOBILIZED 2,224 VOLUNTEERS WHO CONTRIBUTED 12,882 HOURS OF THEIR TIME; A TOTAL VALUE OF \$431,401.

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 3,561,060.

**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)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? 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? <i>If "Yes," complete Schedule C, Part I</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? <i>If "Yes," complete Schedule C, Part II</i>		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 Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		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? <i>If "Yes," complete Schedule D, Part I</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? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount 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? <i>If "Yes," complete Schedule D, Part IV</i>	X	
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		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? <i>If "Yes," complete Schedule D, Part VI</i>	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? <i>If "Yes," complete Schedule D, Part VII</i>	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? <i>If "Yes," complete Schedule D, Part VIII</i>		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? <i>If "Yes," complete Schedule D, Part IX</i>	X	
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	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)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		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? <i>If "Yes," complete Schedule F, Parts I and IV</i>		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? <i>If "Yes," complete Schedule F, Parts II and IV</i>		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? <i>If "Yes," complete Schedule F, Parts III and IV</i>		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? <i>If "Yes," complete Schedule G, Part I.</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? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		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? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	

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

	Yes	No
<b>22</b> 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? <i>If "Yes," complete Schedule I, Parts I and III</i> .....		X
<b>23</b> 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? <i>If "Yes," complete Schedule J</i> .....		X
<b>24a</b> 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, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>b</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? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>26</b> 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? <i>If "Yes," complete Schedule L, Part II</i> .....		X
<b>27</b> 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? <i>If "Yes," complete Schedule L, Part III</i> .....		X
<b>28</b> 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):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>29</b> Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....		X
<b>b</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)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		X
<b>37</b> 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? <i>If "Yes," complete Schedule R, Part VI</i> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? .....	X	

**Note:** All Form 990 filers are required to complete Schedule O

**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
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable .....		
<b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable .....		
<b>c</b> 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)

Table with columns for question number, question text, and Yes/No columns. Includes questions 2a through 17 regarding employee counts, tax returns, gross income, foreign accounts, prohibited transactions, and charitable contributions.

**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
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year ..... <b>14</b> 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.		
<b>b</b>	Enter the number of voting members included on line 1a, above, who are independent ..... <b>14</b>		
<b>2</b>	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? .....		X
<b>3</b>	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? .....		X
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .....		X
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets? .....		X
<b>6</b>	Did the organization have members or stockholders? .....		X
<b>7a</b>	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? .....		X
<b>b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? .....		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b>	The governing body? .....	X	
<b>b</b>	Each committee with authority to act on behalf of the governing body? .....	X	
<b>9</b>	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 .....		X

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

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates? .....		X
<b>b</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? .....		
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .....		X
<b>b</b>	Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13 .....	X	
<b>b</b>	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .....	X	
<b>c</b>	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done .....	X	
<b>13</b>	Did the organization have a written whistleblower policy? .....	X	
<b>14</b>	Did the organization have a written document retention and destruction policy? .....	X	
<b>15</b>	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?		
<b>a</b>	The organization's CEO, Executive Director, or top management official .....	X	
<b>b</b>	Other officers or key employees of the organization .....	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? .....		X
<b>b</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? .....		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed MI
- 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.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records  
ANNA MURPHY - 269-982-1700  
2015 LAKEVIEW AVE., ST. JOSEPH, MI 49085

**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) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ANNA MURPHY PRESIDENT	50.00			X				137,004.	0.	9,128.
(2) TIM SMITH OFFICER, BOARD CHAIR	2.00	X		X				0.	0.	0.
(3) RON GRIESINGER OFFICER, TREASURER	2.00	X		X				0.	0.	0.
(4) GOKUL NAIR OFFICER, VICE CHAIR	2.00	X		X				0.	0.	0.
(5) ALEXANDRA NEWMAN DIRECTOR	2.00	X		X				0.	0.	0.
(6) GLENN COWLES DIRECTOR	2.00	X						0.	0.	0.
(7) MARIA ZAVALA DIRECTOR	2.00	X						0.	0.	0.
(8) RANDY HENDRIXSON DIRECTOR	2.00	X						0.	0.	0.
(9) NICOLE BRITTEN DIRECTOR	2.00	X						0.	0.	0.
(10) KIRSTEN HEWITT OFFICER, ASSOCIATE VICE CHAIR	2.00	X		X				0.	0.	0.
(11) SOROYA PIERRE VANARTSEN DIRECTOR	2.00	X						0.	0.	0.
(12) MATTHEW MCLAUGHLIN DIRECTOR	2.00	X						0.	0.	0.
(13) COLLEEN REINHART DIRECTOR	2.00	X						0.	0.	0.
(14) CORY SHIMULUNAS DIRECTOR	2.00	X						0.	0.	0.
(15) SUSAN DOBRICH DIRECTOR	2.00	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
<b>1b Subtotal</b> .....							137,004.	0.	9,128.	
<b>c Total from continuation sheets to Part VII, Section A</b> .....							0.	0.	0.	
<b>d Total (add lines 1b and 1c)</b> .....							137,004.	0.	9,128.	

**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

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> .....		X
<b>4</b> 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? <i>If "Yes," complete Schedule J for such individual</i> .....		X
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> .....		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) Name and business address	(B) Description of services	(C) Compensation
NONE		

**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)	(B)	(C)	(D)	
				Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	<b>1 a</b>	Federated campaigns .....	<b>1a</b>					
	<b>b</b>	Membership dues .....	<b>1b</b>					
	<b>c</b>	Fundraising events .....	<b>1c</b>					
	<b>d</b>	Related organizations .....	<b>1d</b>					
	<b>e</b>	Government grants (contributions) .....	<b>1e</b>					
	<b>f</b>	All other contributions, gifts, grants, and similar amounts not included above ...	<b>1f</b>	3,241,961.				
	<b>g</b>	Noncash contributions included in lines 1a-1f	<b>1g</b>	\$				
	<b>h</b>	<b>Total.</b> Add lines 1a-1f .....		3,241,961.				
Program Service Revenue	<b>2 a</b>	<b>GREAT START</b>	<b>Business Code</b>	900099	36,436.	36,436.		
	<b>b</b>	<b>OTHER PROGRAM FEES</b>		900099	228.	228.		
	<b>c</b>							
	<b>d</b>							
	<b>e</b>							
	<b>f</b>	All other program service revenue .....						
	<b>g</b>	<b>Total.</b> Add lines 2a-2f .....			36,664.			
Other Revenue	<b>3</b>	Investment income (including dividends, interest, and other similar amounts) .....			79,504.		79,504.	
	<b>4</b>	Income from investment of tax-exempt bond proceeds .....						
	<b>5</b>	Royalties .....						
	<b>6 a</b>	Gross rents .....	<b>6a</b>	(i) Real				
				(ii) Personal				
	<b>b</b>	Less: rental expenses ...	<b>6b</b>					
	<b>c</b>	Rental income or (loss)	<b>6c</b>					
	<b>d</b>	Net rental income or (loss) .....						
	<b>7 a</b>	Gross amount from sales of assets other than inventory .....	<b>7a</b>	(i) Securities	971,368.	92,885.		
				(ii) Other				
	<b>b</b>	Less: cost or other basis and sales expenses .....	<b>7b</b>	971,146.	72,723.			
<b>c</b>	Gain or (loss) .....	<b>7c</b>	222.	20,162.				
<b>d</b>	Net gain or (loss) .....			20,384.		20,384.		
<b>8 a</b>	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 .....	<b>8a</b>						
<b>b</b>	Less: direct expenses .....	<b>8b</b>						
<b>c</b>	Net income or (loss) from fundraising events .....							
<b>9 a</b>	Gross income from gaming activities. See Part IV, line 19 .....	<b>9a</b>						
<b>b</b>	Less: direct expenses .....	<b>9b</b>						
<b>c</b>	Net income or (loss) from gaming activities .....							
<b>10 a</b>	Gross sales of inventory, less returns and allowances .....	<b>10a</b>						
<b>b</b>	Less: cost of goods sold .....	<b>10b</b>						
<b>c</b>	Net income or (loss) from sales of inventory .....							
Miscellaneous Revenue	<b>11 a</b>		<b>Business Code</b>					
	<b>b</b>							
	<b>c</b>							
	<b>d</b>	All other revenue .....						
	<b>e</b>	<b>Total.</b> Add lines 11a-11d .....						
<b>12</b>	<b>Total revenue.</b> See instructions .....			3,378,513.	36,664.	0.	99,888.	

**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) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...	2,603,630.	2,603,630.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22 .....				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 .....				
<b>4</b> Benefits paid to or for members .....				
<b>5</b> Compensation of current officers, directors, trustees, and key employees .....	146,132.	105,304.	39,717.	1,111.
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) .....				
<b>7</b> Other salaries and wages .....	927,750.	302,530.	330,689.	294,531.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
<b>9</b> Other employee benefits .....	118,817.	38,024.	36,704.	44,089.
<b>10</b> Payroll taxes .....	80,870.	30,485.	27,992.	22,393.
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management .....				
<b>b</b> Legal .....				
<b>c</b> Accounting .....	11,500.		11,500.	
<b>d</b> Lobbying .....				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees .....	14,996.		14,996.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	152,582.	75,452.	70,701.	6,429.
<b>12</b> Advertising and promotion .....	69,613.	4,102.	57,329.	8,182.
<b>13</b> Office expenses .....	6,029.	2,193.	2,063.	1,773.
<b>14</b> Information technology .....	55,820.	13,228.	8,494.	34,098.
<b>15</b> Royalties .....				
<b>16</b> Occupancy .....	47,705.	14,679.	21,709.	11,317.
<b>17</b> Travel .....	9,913.	5,714.	2,147.	2,052.
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
<b>19</b> Conferences, conventions, and meetings .....				
<b>20</b> Interest .....	266.		266.	
<b>21</b> Payments to affiliates .....	62,053.	4,680.	54,981.	2,392.
<b>22</b> Depreciation, depletion, and amortization .....	34,553.	14,091.	11,303.	9,159.
<b>23</b> Insurance .....				
<b>24</b> 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.)				
<b>a</b> <b>SUPPLIES</b>	388,701.	345,022.	5,332.	38,347.
<b>b</b> <b>DEVELOPMENT/TRAINING</b>	2,724.	1,926.	798.	0.
<b>c</b> _____				
<b>d</b> _____				
<b>e</b> All other expenses _____				
<b>25</b> <b>Total functional expenses.</b> Add lines 1 through 24e	4,733,654.	3,561,060.	696,721.	475,873.
<b>26</b> <b>Joint costs.</b> 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) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....		<b>1</b>	
	<b>2</b> Savings and temporary cash investments .....	542,380.	<b>2</b>	558,988.
	<b>3</b> Pledges and grants receivable, net .....	2,726,730.	<b>3</b>	1,874,081.
	<b>4</b> Accounts receivable, net .....	27,826.	<b>4</b>	7,538.
	<b>5</b> 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 .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	62,866.	<b>9</b>	37,515.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 1,018,113.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 464,939.	656,495.	<b>10c</b> 553,174.
	<b>11</b> Investments - publicly traded securities .....		<b>11</b>	
	<b>12</b> Investments - other securities. See Part IV, line 11 .....	1,612,180.	<b>12</b>	1,376,691.
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	215,424.	<b>15</b>	235,533.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	5,843,901.	<b>16</b>	4,643,520.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	69,829.	<b>17</b>	75,863.
	<b>18</b> Grants payable .....	1,460,250.	<b>18</b>	1,537,028.
	<b>19</b> Deferred revenue .....		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> 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 .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> 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 .....	114,728.	<b>25</b>	125,746.
	<b>26 Total liabilities.</b> Add lines 17 through 25 .....	1,644,807.	<b>26</b>	1,738,637.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	1,252,455.	<b>27</b>	1,022,035.
	<b>28</b> Net assets with donor restrictions .....	2,946,639.	<b>28</b>	1,882,848.
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32</b> Total net assets or fund balances .....	4,199,094.	<b>32</b>	2,904,883.
<b>33</b> Total liabilities and net assets/fund balances .....	5,843,901.	<b>33</b>	4,643,520.	

**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	3,378,513.
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,733,654.
3	Revenue less expenses. Subtract line 2 from line 1	3	-1,355,141.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	4,199,094.
5	Net unrealized gains (losses) on investments	5	71,617.
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	-10,687.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	2,904,883.

**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		
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?		X
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:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	X	
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:			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
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?	X	
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
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

<b>Name of the organization</b> UNITED WAY OF SOUTHWEST MICHIGAN	<b>Employer identification number</b> 38-1358411
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**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		
<b>Total</b>						

**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
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	4901076.	5003226.	4788675.	3996653.	3241961.	21931591.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	4901076.	5003226.	4788675.	3996653.	3241961.	21931591.
<b>5</b> 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) .....						
<b>6 Public support.</b> Subtract line 5 from line 4.						21931591.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
<b>7</b> Amounts from line 4 .....	4901076.	5003226.	4788675.	3996653.	3241961.	21931591.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	71,871.	38,269.	32,799.	46,206.	79,504.	268,649.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>11 Total support.</b> Add lines 7 through 10						22200240.
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	
<b>13 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**

<b>14</b> Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f)) .....	<b>14</b>	98.79	%
<b>15</b> Public support percentage from 2023 Schedule A, Part II, line 14 .....	<b>15</b>	98.83	%
<b>16a 33 1/3% support test - 2024.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2023.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2024.</b> 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 <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2023.</b> 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 <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....			<input type="checkbox"/>

**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
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> 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 .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</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 .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 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
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 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**

<b>15</b> Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2023 Schedule A, Part III, line 15 .....	<b>16</b>	%

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

<b>17</b> Investment income percentage for 2024 (line 10c, column (f), divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2023 Schedule A, Part III, line 17 .....	<b>18</b>	%

**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
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
<b>b</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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> 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)? <i>If "Yes," explain in Part VI 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.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, 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).</i>		
<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?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> 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? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> 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? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>9a</b> 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))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</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? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> 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? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> 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)? <i>If "Yes," answer line 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> 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>b</b> A family member of a person described on line 11a above?		
<b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>		
<b>11a</b>		
<b>11b</b>		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> 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? <i>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.</i>		
<b>2</b> 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? <i>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.</i>		
<b>1</b>		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> 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)? <i>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).</i>		
<b>1</b>		

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

	Yes	No
<b>1</b> 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?		
<b>2</b> 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? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
<b>3</b> 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? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		
<b>1</b>		
<b>2</b>		
<b>3</b>		

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

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
<b>2</b> Activities Test. Answer lines 2a and 2b below.		
<b>a</b> 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? <i>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.</i>		
<b>b</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? <i>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.</i>		
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.		
<b>a</b> 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? <i>If "Yes" or "No," provide details in Part VI.</i>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		
<b>2a</b>		
<b>2b</b>		
<b>3a</b>		
<b>3b</b>		

**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.

<b>Section A - Adjusted Net Income</b>		(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	

<b>Section B - Minimum Asset Amount</b>		(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 ( <i>explain in detail in Part VI</i> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash 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	

<b>Section C - Distributable Amount</b>			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	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

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

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

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



Schedule B (Form 990)

(Rev. 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 for the latest information.

OMB No. 1545-0047

Table with 2 columns: Name of the organization (UNITED WAY OF SOUTHWEST MICHIGAN) and Employer identification number (38-1358411)

Organization type (check one):

Filers of:

Section:

- Form 990 or 990-EZ: [X] 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

- [X] 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  <b>UNITED WAY OF SOUTHWEST MICHIGAN</b>	Employer identification number  <b>38-1358411</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	<hr/> <hr/> <hr/>	\$ 963,121.	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	<hr/> <hr/> <hr/>	\$ 929,378.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	<hr/> <hr/> <hr/>	\$ 128,357.	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	<hr/> <hr/> <hr/>	\$ 110,841.	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization  <b>UNITED WAY OF SOUTHWEST MICHIGAN</b>	Employer identification number  <b>38-1358411</b>
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____
		\$ _____	_____

Name of organization  <b>UNITED WAY OF SOUTHWEST MICHIGAN</b>	Employer identification number  <b>38-1358411</b>
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**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 info. once.) \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	

**SCHEDULE C**  
**(Form 990)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2024**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

**For Organizations Exempt From Income Tax Under Section 501(c) and Section 527**  
**Complete if the organization is described below. 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.**

**If the organization answered "Yes" on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then:**

- Section 501(c)(3) organizations: Complete Parts I-A and I-B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and I-C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes" on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then:**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes" on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions), or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then:**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization <b>UNITED WAY OF SOUTHWEST MICHIGAN</b>	Employer identification number (EIN) <b>38-1358411</b>
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**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political campaign activity expenditures ..... \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities ..... \_\_\_\_\_

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ..... \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ..... \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? .....  Yes  No
- 4a Was a correction made? .....  Yes  No
- b If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ..... \$ \_\_\_\_\_
- 4 Did the filing organization file **Form 1120-POL** for this year? .....  Yes  No
- 5 Enter the names, addresses, and EINs of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.

**Part II-A** Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B Check  if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)	(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b> Total lobbying expenditures to influence public opinion (grassroots lobbying) .....	0.													
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying) .....	0.													
<b>c</b> Total lobbying expenditures (add lines 1a and 1b) .....	0.													
<b>d</b> Other exempt purpose expenditures .....	4,733,654.													
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d) .....	4,733,654.													
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.	386,683.													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">IF the amount on line 1e, column (a) or (b), is:</th> <th style="text-align: left;">THEN the lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	IF the amount on line 1e, column (a) or (b), is:	THEN the lobbying nontaxable amount is:	not over \$500,000	20% of the amount on line 1e.	over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	over \$17,000,000	\$1,000,000.		
IF the amount on line 1e, column (a) or (b), is:	THEN the lobbying nontaxable amount is:													
not over \$500,000	20% of the amount on line 1e.													
over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.													
over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.													
over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.													
over \$17,000,000	\$1,000,000.													
<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f) .....	96,671.													
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0- .....	0.													
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0- .....	0.													
<b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? .....		<input type="checkbox"/> Yes <input type="checkbox"/> No												

**4-Year Averaging Period Under Section 501(h)**  
 (Some organizations that made a section 501(h) election do not have to complete all of the five columns below.  
 See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2021	(b) 2022	(c) 2023	(d) 2024	(e) Total
<b>2a</b> Lobbying nontaxable amount		462,093.	423,099.	386,683.	1,271,875.
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					1,907,813.
<b>c</b> Total lobbying expenditures		4,685.	3,854.		8,539.
<b>d</b> Grassroots nontaxable amount		115,523.	105,775.	96,671.	317,969.
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					476,954.
<b>f</b> Grassroots lobbying expenditures		4,685.	3,854.		8,539.

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

Table with 3 main columns: (a) Yes, (a) No, (b) Amount. Rows include questions about lobbying activities like volunteers, paid staff, media, mailings, etc.

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

Table with 3 columns: Question, Yes, No. Rows include questions about dues, lobbying expenditures, and carryover.

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No," OR (b) Part III-A, line 3, is answered "Yes."

Table with 3 columns: Question, Yes, No. Rows include questions about dues, section 162(e) expenditures, and carryover.

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

Blank lines for providing supplemental information as required by the instructions.

**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

UNITED WAY OF SOUTHWEST MICHIGAN

Employer identification number

38-1358411

**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).

Preservation of land for public use (for example, recreation or education)     Preservation of a historically important land area

Protection of natural habitat     Preservation of a certified historic structure

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 **d**  Loan or exchange program
- b**  Scholarly research **e**  Other \_\_\_\_\_
- c**  Preservation for future generations
- 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    |
|--|-----------|
| <b>c</b> Beginning balance             | <b>1c</b> |
| <b>d</b> Additions during the year     | <b>1d</b> |
| <b>e</b> Distributions during the year | <b>1e</b> |
| <b>f</b> Ending balance                | <b>1f</b> |
- 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
<b>1a</b> Beginning of year balance					
<b>b</b> Contributions					
<b>c</b> Net investment earnings, gains, and losses					
<b>d</b> Grants or scholarships					
<b>e</b> Other expenditures for facilities and programs					
<b>f</b> Administrative expenses					
<b>g</b> 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:
- |   | Yes           | No |
|---|---------------|----|
| <b>(i)</b> Unrelated organizations?   | <b>3a(i)</b>  |    |
| <b>(ii)</b> Related organizations?  | <b>3a(ii)</b> |    |
| <b>b</b> If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | <b>3b</b>     |    |
- 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
<b>1a</b> Land				
<b>b</b> Buildings		762,184.	236,815.	525,369.
<b>c</b> Leasehold improvements				
<b>d</b> Equipment				
<b>e</b> Other		255,929.	228,124.	27,805.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				553,174.

**Part VII Investments - Other Securities**

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>FIXED INCOME MUTUAL FUNDS</b>	<b>1,376,691.</b>	<b>END-OF-YEAR MARKET VALUE</b>
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, line 12, col. (B))	<b>1,376,691.</b>	

**Part VIII Investments - Program Related.**

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)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, line 13, col. (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) <b>BENEFICIAL INTEREST IN ASSETS HELD</b>	<b>234,472.</b>
(2) <b>POSTAGE INVENTORY</b>	<b>1,061.</b>
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 15, col. (B))	<b>235,533.</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.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) <b>DUE TO DESIGNATED AGENCIES</b>	<b>89,815.</b>
(3) <b>OTHER ACCRUALS</b>	<b>35,931.</b>
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 25, col. (B))	<b>125,746.</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	3,424,447.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	71,617.	
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	12,440.	
e	Add lines 2a through 2d	2e		84,057.
3	Subtract line 2e from line 1		3	3,340,390.
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	14,996.	
b	Other (Describe in Part XIII.)	4b	23,127.	
c	Add lines 4a and 4b	4c		38,123.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	3,378,513.

**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	4,718,658.
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		0.
3	Subtract line 2e from line 1		3	4,718,658.
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	14,996.	
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b	4c		14,996.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	4,733,654.

**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.

**PART IV, LINE 2B:**

THE ORGANIZATION ACTS IN AN AGENCY CAPACITY WITH ANOTHER ORGANIZATION (WHIRLPOOL CORPORATION). THE ORGANIZATION COLLECTS AND DISTRIBUTES FUNDS UNDER THE DIRECTION OF THIS OTHER ORGANIZATION. THE ORGANIZATION RECORDS THE ASSETS HELD AS CASH AND CASH EQUIVALENTS WITH AN OFFSETTING LIABILITY RECORDED.

**PART X, LINE 2:**

THE INCOME TAXES TOPIC, FASB ASC 740, CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES RECOGNIZED IN AN ENTITY'S FINANCIAL STATEMENTS. ASC 740 REQUIRES AN ENTITY TO DISCLOSE THE NATURE OF UNCERTAIN TAX POSITIONS TAKEN, IF ANY, WHEN FILING ITS INCOME TAX RETURN UTILIZING A TWO-STEP PROCESS TO RECOGNIZE AND MEASURE ANY UNCERTAIN TAX POSITIONS TAKEN. THE ENTITY RECOGNIZES A TAX BENEFIT ONLY IF IT IS MORE LIKELY THAN NOT THE POSITION WOULD BE SUSTAINED IN A TAX EXAMINATION, WITH A TAX EXAMINATION BEING PRESUMED TO OCCUR. NO TAX BENEFIT WILL BE RECORDED ON TAX POSITIONS NOT MEETING THE MORE LIKELY THAN NOT TEST. INTEREST AND PENALTIES ACCRUED OR INCURRED, IF ANY, AS A RESULT OF APPLYING ASC 740 WILL BE RECORDED TO INTEREST EXPENSE AND OTHER EXPENSE, RESPECTIVELY.

**PART XI, LINE 2D - OTHER ADJUSTMENTS:**

CHANGE IN BENEFICIAL INTEREST IN COMMUNITY FOUNDATION 12,440.

**PART XI, LINE 4B - OTHER ADJUSTMENTS:**

DONOR DESIGNATIONS 23,127.



**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 SOUTHWEST MICHIGAN** Employer identification number **38-1358411**

**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.

**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.

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section (if applicable)	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of noncash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of noncash assistance	<b>(h)</b> Purpose of grant or assistance
AMERICAN RED CROSS COUNTY CHAPTER 303 RIVERVIEW BENTON HARBOR, MI 49022	38-1359183	501C3	27,300.	0.			GENERAL SUPPORT
BERRIEN COUNTY CANCER SERVICE 7301 RED ARROW HIGHWAY STEVENSVILLE, MI 49127	38-1387101	501C3	81,900.	0.			GENERAL SUPPORT
BERRIEN COUNTY HEALTH DEPARTMENT P.O. BOX 706 BENTON HARBOR, MI 49022	38-6000191	GOV	134,876.	0.			GENERAL SUPPORT
BERRIEN RESA 717 ST. JOSEPH AVE. BERRIEN SPRINGS, MI 49103	38-1714920	GOV	72,800.	0.			GENERAL SUPPORT
BIG BROTHERS BIG SISTERS 10 N. THIRD ST. NILES, MI 49120	38-1846835	501C3	44,362.	0.			GENERAL SUPPORT
BOYS AND GIRLS CLUB OF BENTON HARBOR - 1200 EAST MAIN ST. - BENTON HARBOR, MI 49022	38-3461586	501C3	127,400.	0.			GENERAL SUPPORT

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

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

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

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(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 non-cash assistance	(h) Purpose of grant or assistance
CAMP FIRE RIVER BEND PO BOX 459 NOTRE DAME, IN 46556	35-0924790	501C3	22,750.	0.			GENERAL SUPPORT
CARES 960 AGARD BENTON HARBOR, MI 49023	38-2784545	501C3	16,380.	0.			GENERAL SUPPORT
CENTER(ED) ON WELLNESS 1850 COLFAX AVE. BENTON HARBOR, MI 49022	38-2032501	501C3	94,640.	0.			GENERAL SUPPORT
CHILDREN'S ADVOCACY CENTER OF SOUTHWEST MICHIGAN - 4938 S NILES RD - ST. JOSEPH, MI 49085	38-2265793	501C3	95,550.	0.			GENERAL SUPPORT
DISABILITY NETWORK OF SOUTHWEST MICHIGAN - 517 E CROSSTOWN PARKWAY - KALAMAZOO, MI 49001	38-2351028	501C3	23,660.	0.			GENERAL SUPPORT
DOMESTIC AND SEXUAL ABUSE SERVICES 197 E. MICHIGAN THREE RIVERS, MI 49093	38-2590266	501C3	9,100.	0.			GENERAL SUPPORT
DOMESTIC VIOLENCE COALITION 303 E PAW PAW ST #7 PAW PAW, MI 49079	38-2460520	501C3	22,750.	0.			GENERAL SUPPORT
EMERGENCY SHELTER SERVICES INC. 645 PIPESTONE RD. BENTON HARBOR, MI 49022	38-2268351	501C3	77,350.	0.			GENERAL SUPPORT
FEEDING AMERICA WEST MI FOOD BANK 864 W. RIVER CENTER DRIVE NE COMSTOCK PARK, MI 49321	36-3673599	501C3	59,150.	0.			GENERAL SUPPORT

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(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 non-cash assistance	(h) Purpose of grant or assistance
GIRLS ON THE RUN PO BOX 440 ST. JOSEPH, MI 49085	81-3590502	501C3	27,300.	0.			GENERAL SUPPORT
JUNIOR ACHIEVEMENT 601 NOBLE DR. FORT WAYNE, IN 46825	35-0922731	501C3	18,200.	0.			GENERAL SUPPORT
KINEXUS 499 W MAIN ST. BENTON HARBOR, MI 49022	38-3287818	501C3	159,250.	0.			GENERAL SUPPORT
LAKE MICHIGAN COLLEGE 2755 E. NAPIER AVE. BENTON HARBOR, MI 49022	38-2714753	501C3	68,250.	0.			GENERAL SUPPORT
LEGAL AID OF WESTERN MICHIGAN 901 PORT ST ST. JOSEPH, MI 49085	38-2156874	501C3	27,300.	0.			GENERAL SUPPORT
LOGAN COMMUNITY RESOURCES 2505 E. JEFFERSON BOULEVARD SOUTH BEND, IN 46615	35-0965639	501C3	91,000.	0.			GENERAL SUPPORT
OCCDA PO BOX 1146 BENTON HARBOR, MI 49022	27-1050319	501C3	45,500.	0.			GENERAL SUPPORT
OUTCENTER OF SOUTHWEST MICHIGAN 132 WATER STREET BENTON HARBOR, MI 49022	80-0341856	501C3	31,850.	0.			GENERAL SUPPORT
REGION IV AREA AGENCY ON AGING INC 2900 LAKEVIEW AVE. ST. JOSEPH, MI 49085	38-2332594	501C3	215,670.	0.			GENERAL SUPPORT

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(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 non-cash assistance	(h) Purpose of grant or assistance
SALVATION ARMY - BENTON HARBOR 233 MICHIGAN BENTON HARBOR, MI 49022	38-1359297	501C3	118,300.	0.			GENERAL SUPPORT
SALVATION ARMY - NILES 424 15TH ST. NILES, MI 49120	38-1359297	501C3	68,250.	0.			GENERAL SUPPORT
SENIOR NUTRITION SERVICES REGION IV, INC. - 1708 COLFAX - BENTON HARBOR, MI 49022	38-2766803	501C3	50,050.	0.			GENERAL SUPPORT
SENIOR SERVICES OF VAN BUREN COUNTY - 600 E MICHIGAN AVE - PAW PAW, MI 49079	38-3200638	501C3	13,650.	0.			GENERAL SUPPORT
SOUTHWEST MICHIGAN COMMUNITY ACTION AGENCY - 185 E. MAIN ST. STE 303 - BENTON HARBOR, MI 49022	38-2415106	501C3	31,850.	0.			GENERAL SUPPORT
SOUTHWESTERN MICHIGAN COLLEGE 58900 CHERRY GROVE RD. DOWAGIAC, MI 49047	38-1943374	501C3	25,480.	0.			GENERAL SUPPORT
THE AVENUE FAMILY NETWORK 2450 SOUTH M-139 BENTON HARBOR, MI 49022	38-2592238	501C3	96,460.	0.			GENERAL SUPPORT
UNITED CHRISTIAN SERVICES OF EASTERN VAN BUREN COUNTY - 600 E MICHIGAN AVE - PAW PAW, MI 49079	82-2904639	501C3	27,300.	0.			GENERAL SUPPORT
VAN BUREN/CASS DISTRICT HEALTH DEPARTMENT - 57418 CR 681 - HARTFORD, MI 49057	38-2715388	GOV	45,500.	0.			GENERAL SUPPORT

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(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 non-cash assistance	(h) Purpose of grant or assistance
WELL OF GRACE 5707 RED ARROW HWY STEVENSVILLE, MI 49127	20-1716641	501C3	13,650.	0.			GENERAL SUPPORT
WOODLANDS 960 M-60 EAST CASSOPOLIS, MI 49031	38-2470901	501C3	22,750.	0.			GENERAL SUPPORT
YMCA OF SOUTHWEST MICHIGAN 905 N. FRONT ST. NILES, MI 49120	38-1358236	501C3	118,300.	0.			GENERAL SUPPORT
YOUTH SOLUTIONS 330 WEST MAIN BENTON HARBOR, MI 49022	82-1416934	501C3	75,530.	0.			GENERAL SUPPORT
BENTON HARBOR COMMUNITY DEVELOPMENT CORPORATION - 273 MORTON AVE APT 2 - BENTON HARBOR, MI 49022	85-3784631	501C3	82,355.	0.			GENERAL SUPPORT
COURT APPOINTED SPECIAL ADVOCATES OF SW MI - PO BOX 1146 - BENTON HARBOR, MI 49023	83-3301571	501C3	36,400.	0.			GENERAL SUPPORT
HERITAGE SOUTHWEST ISD 61682 DAILEY RD CASSOPOLIS, MI 49031	38-1717760	501C3	40,950.	0.			GENERAL SUPPORT
MICHIANA FAMILY CENTER 69244 SUNDANCE DR PROVINCE, MI 49112	84-3611389	501C3	9,100.	0.			GENERAL SUPPORT
NEIGHBOR BY NEIGHBOR 16170 RED ARROW HWY STE C7 UNION PIER, MI 49129	86-3461874	501C3	22,750.	0.			GENERAL SUPPORT

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(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 non-cash assistance	(h) Purpose of grant or assistance
NEW HEIGHTS CHRISTIAN COMMUNITY DEVELOPMENT ASSOCIATION - 4367 S NILES RD - ST. JOSEPH, MI 49085	81-5017908	501C3	18,200.	0.			GENERAL SUPPORT
SAFE HARBOR CHILDRENS ADVOCACY CENTER - 402 TROWBRIDGE ST. - ALLEGAN, MI 49010	38-2748322	501C3	27,300.	0.			GENERAL SUPPORT
CENTER FOR GROWTH AND INDEPENDENCE 1440 E EMPIRE AVE BENTON HARBOR, MI 49022	38-2025227	501C3	45,500.	0.			GENERAL SUPPORT
VAN BUREN COMMUNITY MENTAL HEALTH AUTHORITY - 801 HAZEN ST #C - PAW PAW, MI 49079	38-1917556	501C3	6,067.	0.			GENERAL SUPPORT
WE CARE COMMUNITY RESOURCE CENTER 1301 M-43 SUITE 2B SOUTH HAVEN, MI 49090	38-2463936	501C3	13,650.	0.			GENERAL SUPPORT



**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 SOUTHWEST MICHIGAN

Employer identification number

38-1358411

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:  
COMMUNITY WHERE EVERYONE CONTRIBUTES, BELONGS, AND THRIVES.

FORM 990, PART VI, SECTION B, LINE 11B:

THE ORGANIZATION'S 990 IS PREPARED BY THEIR INDEPENDENT ACCOUNTANTS. BOTH A DRAFT AND/OR "PDF" VERSION OF THE RETURN IS PROVIDED TO THE ORGANIZATION'S PRESIDENT AND EXECUTIVE COMMITTEE FOR REVIEW. THIS COMMITTEE ACTS ON BEHALF OF THE GOVERNING BOARD AND GIVES FINAL APPROVAL FOR THE FILING OF THE 990 BY EITHER MAIL OR ELECTRONICALLY.

FORM 990, PART VI, SECTION B, LINE 12C:

ANNUALLY, ALL OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES ARE REQUIRED TO COMPLETE THE "CONFLICT OF INTEREST QUESTIONNAIRE" AND THEY ARE REVIEWED BY THE GOVERNING BOARD AND EXECUTIVE DIRECTOR. ANY FOLLOW-UP IS DONE ON A CASE BY CASE BASIS.

FORM 990, PART VI, SECTION B, LINE 15:

THE ORGANIZATIONS PROCESS FOR DETERMINING COMPENSATION INCLUDES THE FOLLOWING ELEMENTS 1.) REVIEW AND APPROVAL BY THE EXECUTIVE COMMITTEE; 2.) USE OF DATA AS TO COMPARABLE COMPENSATION; AND 3.) CONTEMPORANEOUS DOCUMENTATION AND RECORDKEEPING. THE EXECUTIVE COMMITTEE HAS THE RESPONSIBILITY FOR SETTING COMPENSATION WITHIN THE PRESCRIBED GUIDELINES FOR THE PRESIDENT/CEO. THE PRESIDENT/CEO HAS THE RESPONSIBILITY TO DETERMINE STAFF COMPENSATION WITHIN THE PRESCRIBED GUIDELINES.

FORM 990, PART VI, SECTION C, LINE 19:

THE ORGANIZATION MAINTAINS COPIES OF ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS AT ITS OFFICES. THE ORGANIZATION MAKES THESE DOCUMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

OTHER CHANGE IN BENEFICIAL INTEREST IN COMMUNITY FOUNDATION	12,440.
DONOR DESIGNATED CONTRIBUTIONS	-23,127.
TOTAL TO FORM 990, PART XI, LINE 9	-10,687.

FORM 990, PART XII, LINE 2C

NO CHANGE FROM PRIOR YEAR.

2024 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
	BUILDINGS														
59	BUILDING	12/31/15	SL	39.00		MM16	347,277.				347,277.	86,152.		8,905.	95,057.
72	SHED	04/12/18	SL	20.00		16	3,690.				3,690.	1,063.		185.	1,248.
115	(D)LAND	12/31/15	L				72,723.				72,723.			0.	
	* 990 PAGE 10 TOTAL - BUILDINGS						423,690.				423,690.	87,215.		9,090.	96,305.
	FURNITURE & EQUIPMENT														
11	ANDAR 360 SOFTWARE	12/31/06	SL	3.00		16	7,750.				7,750.	7,750.		0.	7,750.
12	HELIXD ANDAR CAMPAIGN SOFTWARE UPGRADE	04/24/07	SL	3.00		16	7,000.				7,000.	7,000.		0.	7,000.
15	(D)OFFICE FURNITURE - PRESIDENT OFFICE	03/19/08	SL	5.00		16	3,579.				3,579.	3,579.		0.	3,579.
19	HELIX - ALLOC & OUTCOMES SOFTWARE MODULE	01/01/08	SL	3.00		16	5,000.				5,000.	5,000.		0.	5,000.
26	INTERNET INSTALLATION, WIRING, EQUIPMENT	09/01/10	SL	5.00		16	2,825.				2,825.	2,825.		0.	2,825.
27	GROUP A - OFFICE WORKSTATIONS	09/01/10	SL	10.00		16	31,434.				31,434.	31,431.		0.	31,431.
28	GROUP B - OFFICE WORKSTATIONS	09/01/10	SL	10.00		16	31,434.				31,434.	31,431.		0.	31,431.
29	CONFERENCE ROOM TABLE	09/01/10	SL	10.00		16	1,760.				1,760.	1,760.		0.	1,760.
30	20 OFFICE CHAIRS - PLASTIC BACK FABRIC SEAT	09/01/10	SL	5.00		16	3,200.				3,200.	3,200.		0.	3,200.
31	10 OFFICE CHAIRS - MESH BACK FABRIC SEAT	09/01/10	SL	5.00		16	1,120.				1,120.	1,120.		0.	1,120.
32	(D)OFFICE CREDENZA - PRESIDENT OFFICE	09/01/10	SL	10.00		16	1,527.				1,527.	1,527.		0.	1,527.
33	(D)OFFICE FURNISHINGS - PRESIDENT OFFICE	09/01/10	SL	10.00		16	1,989.				1,989.	1,989.		0.	1,989.

2024 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
34	OFFICE FURNISHINGS - FINANCE DIRECTOR OFFICE	09/01/10	SL	10.00		16	1,012.				1,012.	1,012.		0.	1,012.
36	WHIRLPOOL GOLD STAINLESS & BLACK REFRIGERATOR	09/01/10	SL	5.00		16	1,500.				1,500.	1,500.		0.	1,500.
37	WHIRLPOOL STAINLESS STEEL REFRIGERATOR	09/01/10	SL	5.00		16	1,500.				1,500.	1,500.		0.	1,500.
38	WHIRLPOOL DISHWASHER, STAINLESS STEEL	09/01/10	SL	5.00		16	500.				500.	500.		0.	500.
39	WHIRLPOOL DUAL ZONE, SMOOTH SURFACE ELECTRIC	09/01/10	SL	5.00		16	600.				600.	600.		0.	600.
43	TYPEWRITER	04/30/85	SL	5.00		HY16	771.				771.	771.		0.	771.
44	FOUR DRAWER FILE	01/01/86	SL	5.00		HY16	152.				152.	152.		0.	152.
52	HVAC UNIT COVER	08/25/15	SL	5.00		16	700.				700.	700.		0.	700.
53	DELL LAPTOP	10/01/15	SL	3.00		16	950.				950.	950.		0.	950.
54	DELL LAPTOP	11/11/15	SL	3.00		16	1,189.				1,189.	1,189.		0.	1,189.
55	DELL LAPTOP	11/11/15	SL	3.00		16	1,189.				1,189.	1,189.		0.	1,189.
61	MICROSOFT SURFACE PRO 3 TABLET	03/31/17	SL	3.00		16	667.				667.	667.		0.	667.
62	DESK, BULLET W/CORNER & RETURN UNIT, HONEY FINISH	06/30/17	SL	10.00		16	571.				571.	371.		57.	428.
63	DELL COMPUTER	01/01/17	SL	3.00		16	785.				785.	785.		0.	785.
65	MICROSOFT SURFACE PRO	01/01/17	SL	3.00		16	700.				700.	700.		0.	700.
66	MACBOOK PRO	09/01/17	SL	3.00		16	1,699.				1,699.	1,699.		0.	1,699.
74	QUICKBOOKS SOFTWARE	02/13/18	SL	3.00		16	1,609.				1,609.	1,609.		0.	1,609.
75	IACCESS SOFTWARE	04/11/18	SL	3.00		16	1,000.				1,000.	1,000.		0.	1,000.

2024 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
76	(D)LENOVO YOGA 920 LAPTOP	04/12/18	SL	3.00		16	1,855.				1,855.	1,855.		0.	1,855.
77	DELL DESKTOP	04/12/18	SL	3.00		16	748.				748.	748.		0.	748.
78	PAPER FOLDER	10/15/18	SL	5.00		16	2,238.				2,238.	2,238.		0.	2,238.
79	PAPER TRIMMER	10/15/18	SL	5.00		16	3,570.				3,570.	3,570.		0.	3,570.
80	DELL DESKTOP	10/31/18	SL	3.00		16	1,209.				1,209.	1,209.		0.	1,209.
81	6070 COPIER	10/31/18	SL	5.00		16	13,320.				13,320.	13,320.		0.	13,320.
82	3070 COPIER	10/31/18	SL	5.00		16	7,521.				7,521.	7,521.		0.	7,521.
83	70" AQUOS TV	10/31/18	SL	5.00		16	7,788.				7,788.	7,788.		0.	7,788.
84	50" AQUOS TV	10/31/18	SL	5.00		16	2,130.				2,130.	2,130.		0.	2,130.
85	SHUTTLE HIGH-PERFORMANCE PC	10/31/18	SL	3.00		16	1,800.				1,800.	1,800.		0.	1,800.
86	WORKSTATIONS (8)	11/27/18	SL	15.00		16	17,775.				17,775.	6,024.		1,185.	7,209.
87	LAPTOPS (2)	12/18/18	SL	3.00		16	1,348.				1,348.	1,348.		0.	1,348.
101	APPLE MACBOOK	02/11/20	SL	3.00		16	2,756.				2,756.	2,756.		0.	2,756.
102	BATTERY RACKS	07/15/20	SL	5.00		16	3,902.				3,902.	2,730.		780.	3,510.
103	ELECTRICAL FOR IT EQUIPMENT	07/24/20	SL	5.00		16	410.				410.	280.		82.	362.
104	BATTERY RACKS	08/15/20	SL	5.00		16	3,902.				3,902.	2,665.		780.	3,445.
106	MACBOOK PRO 14 INCH	10/26/21	SL	3.00		16	2,119.				2,119.	1,530.		589.	2,119.
107	LENOVO YOGA TOUCH-SCREEN LAPTOP	10/29/21	SL	3.00		16	1,537.				1,537.	1,109.		428.	1,537.

2024 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
108	VOSTRO 5510 LAPTOP	02/04/22	SL	3.00		16	1,197.				1,197.	765.		399.	1,164.
109	VOSTRO 5510 LAPTOP	02/26/22	SL	3.00		16	1,028.				1,028.	629.		343.	972.
110	VOSTRO 7510 LAPTOP	08/28/22	SL	3.00		16	1,199.				1,199.	533.		400.	933.
111	(10) CHROMEBOOKS (VITA)	08/29/22	SL	3.00		16	3,580.				3,580.	1,591.		1,193.	2,784.
112	SOFTWARE LICENSES	11/23/22	SL	3.00		16	2,892.				2,892.	1,044.		964.	2,008.
113	(10) CHROMEBOOKS	10/24/24	SL	3.00		16	3,575.				3,575.			199.	199.
114	(10) CHROME LICENSES	10/24/24	SL	3.00		16	380.				380.			21.	21.
	* 990 PAGE 10 TOTAL - FURNITURE & EQUIPMENT						205,491.				205,491.	180,689.		7,420.	188,109.
	BUILDING IMPROVEMENTS														
42	2014 BUILDING EXPANSION	10/01/14	SL	30.00		16	414,909.				414,909.	127,928.		13,830.	141,758.
60	PHONE AND SECURITY SYSTEM	12/13/16	SL	5.00		16	9,211.				9,211.	9,211.		0.	9,211.
69	PHONE AND SECURITY SYSTEM	01/04/17	SL	5.00		16	5,294.				5,294.	5,294.		0.	5,294.
70	PHONE AND SECURITY SYSTEM	01/04/17	SL	5.00		16	1,180.				1,180.	1,180.		0.	1,180.
71	PHONE AND SECURITY SYSTEM	03/15/17	SL	5.00		16	2,864.				2,864.	2,864.		0.	2,864.
91	LIGHTS & ELECTRICAL OUTLETS	09/18/18	SL	5.00		16	2,800.				2,800.	2,800.		0.	2,800.
95	OFFICE LIGHTING IMPROVEMENTS	06/01/19	SL	10.00		16	1,600.				1,600.	733.		160.	893.
96	BOARDROOM HVAC	04/24/19	SL	10.00		16	4,492.				4,492.	2,095.		449.	2,544.
97	NEW CARPET IN ADMIN WING	05/08/19	SL	10.00		16	5,237.				5,237.	2,445.		524.	2,969.

2024 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
98	SOUND BARRIERS, EXTERIOR DOOR	06/17/19	SL	10.00		16	4,886.				4,886.	2,200.		489.	2,689.
	* 990 PAGE 10 TOTAL - BUILDING IMPROVEMENTS						452,473.				452,473.	156,750.		15,452.	172,202.
	VEHICLES														
90	TOYOTA VAN	05/14/18	SL	7.00		16	18,136.				18,136.	14,682.		2,591.	17,273.
	* 990 PAGE 10 TOTAL - VEHICLES						18,136.				18,136.	14,682.		2,591.	17,273.
	LEASEHOLD IMPROVEMENTS														
	* 990 PAGE 10 TOTAL - LEASEHOLD IMPROVEMENTS						0.				0.	0.		0.	0.
	* GRAND TOTAL 990 PAGE 10 DEPR						1,099,790.				1,099,790.	439,336.		34,553.	473,889.
	CURRENT YEAR ACTIVITY														
	BEGINNING BALANCE						1,095,835.			0.	1,095,835.	439,336.			473,669.
	ACQUISITIONS						3,955.			0.	3,955.	0.			220.
	DISPOSITIONS/RETIRED						81,673.			0.	81,673.	8,950.			8,950.
	ENDING BALANCE						1,018,117.			0.	1,018,117.	430,386.			464,939.
	ENDING ACCUM DEPR LESS DISPOSITIONS											464,939.			
	ENDING BOOK VALUE											553,178.			

2024 DEPRECIATION AND AMORTIZATION REPORT

- CURRENT YEAR FEDERAL - UNITED WAY OF SOUTHWEST MICHIGAN

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	BUILDINGS											
59	BUILDING	123115	SL	39.00	16	347,277.			347,277.	86,152.		8,905.
72	SHED	041218	SL	20.00	16	3,690.			3,690.	1,063.		185.
115	(D)LAND	123115	L			72,723.			72,723.			0.
	* 990 PAGE 10 TOTAL - BUILDINGS					423,690.		0.	423,690.	87,215.		9,090.
	FURNITURE & EQUIPMENT											
11	ANDAR 360 SOFTWARE	123106	SL	3.00	16	7,750.			7,750.	7,750.		0.
12	HELIXD ANDAR CAMPAIGN SOFTWARE U	042407	SL	3.00	16	7,000.			7,000.	7,000.		0.
15	(D)OFFICE FURNITURE - PRESIDENT OFFICE	031908	SL	5.00	16	3,579.			3,579.	3,579.		0.
19	HELIX - ALLOC & OUTCOMES SOFTWARE M	010108	SL	3.00	16	5,000.			5,000.	5,000.		0.
26	INTERNET INSTALLATION, WIRIN	090110	SL	5.00	16	2,825.			2,825.	2,825.		0.
27	GROUP A - OFFICE WORKSTATIONS	090110	SL	10.00	16	31,434.			31,434.	31,431.		0.
28	GROUP B - OFFICE WORKSTATIONS	090110	SL	10.00	16	31,434.			31,434.	31,431.		0.
29	CONFERENCE ROOM TABLE	090110	SL	10.00	16	1,760.			1,760.	1,760.		0.
30	20 OFFICE CHAIRS - PLASTIC BACK FABRIC	090110	SL	5.00	16	3,200.			3,200.	3,200.		0.
31	10 OFFICE CHAIRS - MESH BACK FABRIC SE	090110	SL	5.00	16	1,120.			1,120.	1,120.		0.
32	(D)OFFICE CREDENZA - PRESIDENT OFFICE	090110	SL	10.00	16	1,527.			1,527.	1,527.		0.
33	(D)OFFICE FURNISHINGS - PRESI	090110	SL	10.00	16	1,989.			1,989.	1,989.		0.

2024 DEPRECIATION AND AMORTIZATION REPORT

- CURRENT YEAR FEDERAL - UNITED WAY OF SOUTHWEST MICHIGAN

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34	OFFICE FURNISHINGS - FINANCE DIRECTOR	090110	SL	10.00	16	1,012.			1,012.	1,012.		0.
36	WHIRLPOOL GOLD STAINLESS & BLACK R	090110	SL	5.00	16	1,500.			1,500.	1,500.		0.
37	WHIRLPOOL STAINLESS STEEL REFRIGERATOR	090110	SL	5.00	16	1,500.			1,500.	1,500.		0.
38	WHIRLPOOL DISHWASHER, STAINLE	090110	SL	5.00	16	500.			500.	500.		0.
39	WHIRLPOOL DUAL ZONE, SMOOTH SURFAC	090110	SL	5.00	16	600.			600.	600.		0.
43	TYPEWRITER	043085	SL	5.00	16	771.			771.	771.		0.
44	FOUR DRAWER FILE	010186	SL	5.00	16	152.			152.	152.		0.
52	HVAC UNIT COVER	082515	SL	5.00	16	700.			700.	700.		0.
53	DELL LAPTAP	100115	SL	3.00	16	950.			950.	950.		0.
54	DELL LAPTAP	111115	SL	3.00	16	1,189.			1,189.	1,189.		0.
55	DELL LAPTAP	111115	SL	3.00	16	1,189.			1,189.	1,189.		0.
61	MICROSOFT SURFACE PRO 3 TABLET	033117	SL	3.00	16	667.			667.	667.		0.
62	DESK, BULLET W/CORNER & RETURN U	063017	SL	10.00	16	571.			571.	371.		57.
63	DELL COMPUTER	010117	SL	3.00	16	785.			785.	785.		0.
65	MICROSOFT SURFACE PRO	010117	SL	3.00	16	700.			700.	700.		0.
66	MACBOOK PRO	090117	SL	3.00	16	1,699.			1,699.	1,699.		0.
74	QUICKBOOKS SOFTWARE	021318	SL	3.00	16	1,609.			1,609.	1,609.		0.
75	IACCESS SOFTWARE	041118	SL	3.00	16	1,000.			1,000.	1,000.		0.

2024 DEPRECIATION AND AMORTIZATION REPORT

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76	(D)LENOVO YOGA 920 LAPTOP	041218	SL	3.00	16	1,855.			1,855.	1,855.		0.
77	DELL DESKTOP	041218	SL	3.00	16	748.			748.	748.		0.
78	PAPER FOLDER	101518	SL	5.00	16	2,238.			2,238.	2,238.		0.
79	PAPER TRIMMER	101518	SL	5.00	16	3,570.			3,570.	3,570.		0.
80	DELL DESKTOP	103118	SL	3.00	16	1,209.			1,209.	1,209.		0.
81	6070 COPIER	103118	SL	5.00	16	13,320.			13,320.	13,320.		0.
82	3070 COPIER	103118	SL	5.00	16	7,521.			7,521.	7,521.		0.
83	70" AQUOS TV	103118	SL	5.00	16	7,788.			7,788.	7,788.		0.
84	50" AQUOS TV	103118	SL	5.00	16	2,130.			2,130.	2,130.		0.
85	SHUTTLE HIGH-PERFORMANCE PC	103118	SL	3.00	16	1,800.			1,800.	1,800.		0.
86	WORKSTATIONS (8)	112718	SL	15.00	16	17,775.			17,775.	6,024.		1,185.
87	LAPTOPS (2)	121818	SL	3.00	16	1,348.			1,348.	1,348.		0.
101	APPLE MACBOOK	021120	SL	3.00	16	2,756.			2,756.	2,756.		0.
102	BATTERY RACKS	071520	SL	5.00	16	3,902.			3,902.	2,730.		780.
103	ELECTRICAL FOR IT EQUIPMENT	072420	SL	5.00	16	410.			410.	280.		82.
104	BATTERY RACKS	081520	SL	5.00	16	3,902.			3,902.	2,665.		780.
106	MACBOOK PRO 14 INCH	102621	SL	3.00	16	2,119.			2,119.	1,530.		589.
107	LENOVO YOGA TOUCH-SCREEN LAPTOP	102921	SL	3.00	16	1,537.			1,537.	1,109.		428.

2024 DEPRECIATION AND AMORTIZATION REPORT

- CURRENT YEAR FEDERAL - UNITED WAY OF SOUTHWEST MICHIGAN

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108	VOSTRO 5510 LAPTOP	020422	SL	3.00	16	1,197.			1,197.	765.		399.
109	VOSTRO 5510 LAPTOP	022622	SL	3.00	16	1,028.			1,028.	629.		343.
110	VOSTRO 7510 LAPTOP	082822	SL	3.00	16	1,199.			1,199.	533.		400.
111	(10) CHROMEBOOKS (VITA)	082922	SL	3.00	16	3,580.			3,580.	1,591.		1,193.
112	SOFTWARE LICENSES	112322	SL	3.00	16	2,892.			2,892.	1,044.		964.
113	(10) CHROMEBOOKS	102424	SL	3.00	16	3,575.			3,575.			199.
114	(10) CHROME LICENSES	102424	SL	3.00	16	380.			380.			21.
	* 990 PAGE 10 TOTAL - FURNITURE & EQUIP					205,491.		0.	205,491.	180,689.		7,420.
	BUILDING IMPROVEMENTS											
42	2014 BUILDING EXPANSION	100114	SL	30.00	16	414,909.			414,909.	127,928.		13,830.
60	PHONE AND SECURITY SYSTEM	121316	SL	5.00	16	9,211.			9,211.	9,211.		0.
69	PHONE AND SECURITY SYSTEM	010417	SL	5.00	16	5,294.			5,294.	5,294.		0.
70	PHONE AND SECURITY SYSTEM	010417	SL	5.00	16	1,180.			1,180.	1,180.		0.
71	PHONE AND SECURITY SYSTEM	031517	SL	5.00	16	2,864.			2,864.	2,864.		0.
91	LIGHTS & ELECTRICAL OUTLETS	091818	SL	5.00	16	2,800.			2,800.	2,800.		0.
95	OFFICE LIGHTING IMPROVEMENTS	060119	SL	10.00	16	1,600.			1,600.	733.		160.
96	BOARDROOM HVAC	042419	SL	10.00	16	4,492.			4,492.	2,095.		449.
97	NEW CARPET IN ADMIN WING	050819	SL	10.00	16	5,237.			5,237.	2,445.		524.

2024 DEPRECIATION AND AMORTIZATION REPORT

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98	SOUND BARRIERS, EXTERIOR DOOR	061719	SL	10.00	16	4,886.			4,886.	2,200.		489.
	* 990 PAGE 10 TOTAL - BUILDING IMPROVEM					452,473.		0.	452,473.	156,750.		15,452.
	VEHICLES											
90	TOYOTA VAN	051418	SL	7.00	16	18,136.			18,136.	14,682.		2,591.
	* 990 PAGE 10 TOTAL - VEHICLES					18,136.		0.	18,136.	14,682.		2,591.
	LEASEHOLD IMPROVEMENTS											
	* 990 PAGE 10 TOTAL - LEASEHOLD IMPROVE					0.		0.	0.	0.		0.
	* GRAND TOTAL 990 PAGE 10 DEPR					1099790.		0.	1099790.	439,336.		34,553.
	CURRENT YEAR ACTIVITY											
	BEGINNING BALANCE					1095835.		0.	1095835.	439,336.		
	ACQUISITIONS					3,955.		0.	3,955.	0.		
	DISPOSITIONS					81,673.		0.	81,673.	8,950.		
	ENDING BALANCE					1018117.		0.	1018117.	430,386.		