



#1952

FINANCIAL REPORT

Email:
DFICharitableOrgs@dfi.wisconsin.gov
Mailing Address:
PO Box 7879
Madison, WI 53707-7879

ORGANIZATION INFORMATION - SECTION A

1. Name of charitable organization and any trade names or DBA (doing business as) names the organization uses.

THE UWM FOUNDATION, INC.

2. WI Charitable Organization Number:

1565

- 800

3. Federal Employer Identification Number:

23-7337744

4. Provide the name and contact information of the individual the Department should contact about this form:

First Name: CURTIS		Last Name: STANG	
Street Address: 1440 EAST NORTH AVENUE		City: MILWAUKEE	State: WI
Zip Code: 53202	Phone: 414-906-4645	Email: CURTIS.STANG@UWM.FOUNDATION	

5. Did your organization use a professional fundraiser or fundraising counsel during the fiscal year in Wisconsin? Yes No

If YES, provide contact information for each fundraiser(s), fund raising counsel(s), or person. Attach additional pages, if necessary.

Name:		Fundraiser:	Fundraising Counsel:
Street Address:		City:	State:
Zip:	Telephone Number:	Does this fundraiser/fundraising counsel/person have custody of contributions at any time: <input type="radio"/> Yes <input type="radio"/> No	

6. Has any of the information your organization previously submitted to the division changed? (i.e. name of the organization, address of the principal office, address of any Wisconsin branch officers, accounting period, articles, by-laws, etc.) Yes No

If YES, attach an explanation and a copy of the amended document.

FINANCIAL INFORMATION - SECTION B

7. Organization's Fiscal Year End Date (month, day, and year). Enter the accounting period for the following financial information.

06	mm	30	dd	2023	yyyy
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1. Contributions		1	23,874,266
("Contribution" means a grant or pledge of money, credit, property, or other thing of any kind or value, except used clothing or household goods, to a charitable organization or for a charitable purpose. Bequests received directly from the public and indirect public support, such as contributions received through solicitation campaigns conducted by federated fundraising agencies like United Way should be included in this amount. "Contribution" does not include:			
<ul style="list-style-type: none"> • Income from bingo or raffles conducted under ch. 563, Wis. Stats. • Government grants • Bona fide fees, dues, or assessments paid by a member of a charitable organization, except that, if initial membership in a charitable organization is conferred solely as consideration for making a grant or pledge of money to the charitable organization in response to a solicitation, that grant or pledge of money is a contribution.) 			
2. Other Revenues		2	2,863,671
3. Total Revenue (line 1 plus line 2)		3	26,737,937
4. Expenses:			
a. Expenses Allocated to Program Services	4a	22,939,543	
b. Expenses Allocated to Management and General	4b	2,162,970	
c. Expenses Allocated to Fundraising	4c	1,018,329	
d. Expenses Allocated to Payments to Affiliates	4d	0	
e. Total Expenses		4e	26,120,842
5. Excess or Deficit (line 3 minus line 4e)		5	617,095
6. Net Assets at Beginning of Year		6	206,710,359
7. Other Changes in Net Assets or Fund Balances (See 990, part XI)		7	12,617,904
8. Net Assets at End of Year		8	219945358

ATTACHMENTS

Check the box next to the items that are attached to your annual report. Items A., B., and C. are required. Item D. or E. (or Waiver Application of D. or E.) is required if the contributions received by your organization fall into the described ranges. (Note: If you are submitting this form with your initial application, DO NOT submit the following attachments. Submit the attachments cited in the application form instead).

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A. **List of all officers, directors, trustees, and principal salaried employees** – The list must include each individual's name, address, and title. Please note that "principal salaried employees" refers to the chief administrative officers of your organization, but does not include the heads of separate departments or smaller units within the organization. (You can disregard this item if you are attaching an IRS 990 that already includes the requested information.)

B. **A list of states that have issued a license, registration, permit, or other formal authorization to the organization to solicit contributions.** (You can disregard this item if you are attaching an IRS 990 that already includes the requested information.)

C. **IRS Form #990, 990EZ, or 990-PF. Do not include Schedule B of the 990.**
(Note: If you file an IRS Form 990-N, you cannot use this form. You must complete a Form #308 or Form #1943 instead.)

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D. **Audited Financial Statements** if the organization received contributions in excess of \$500,000 during its fiscal year. The financial statements must be prepared in accordance with generally accepted accounting principles and be accompanied by the opinion of an independent certified public accountant.

OR

Apply for Waiver of "D. Audited Financial Statements" if (1.) the organization's contributions were, during each of the past 3 fiscal years, less than \$100,000; and (2.) during the fiscal year for which the waiver is being requested, the organization received one or more contributions from one contributor that exceeded \$400,000. Include waiver form 1953.

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E. **Reviewed Financial Statements** if the organization received contributions in excess of \$300,000, but not more than \$500,000 during its fiscal year. The financial statements must be prepared in accordance with generally accepted accounting principles by an independent certified public accountant. Audited financial statements are also acceptable.

OR

Apply for Waiver of "E. Reviewed Financial Statements" if (1.) the organization's contributions were, during each of the past 3 fiscal years, less than \$100,000; and (2.) during the fiscal year for which the waiver is being requested, the organization received one or more contributions from one contributor that exceeded \$200,000. Include waiver form 1953.

CERTIFICATION - SECTION C

This document **MUST** be signed by the chief fiscal officer and another officer. Two different officer signatures required. Completion of this form is required under Section 202.12, Wisconsin Statutes.

We, the undersigned, state and acknowledge that we are duly constituted officers of this organization, and that, under penalties of perjury, we have reviewed this report, including all attachments, and to the best of our knowledge and belief, they are true, correct and complete in accordance with the laws of the State of Wisconsin applicable to this report.

David H. Gilbert

Name (Print)

David H. Gilbert

Signature of Officer

6/11/24

Date

SIGN HERE

AND

Curtis A. Stank

Name (Print)

Curtis A. Stank

Signature of Chief Fiscal Officer

6/11/24

Date

SIGN HERE

RETURN MATERIALS TO:

Department of Financial Institutions
Division of Corporate and Consumer Services

Mailing Address:

WDFI/ Charitable Orgs Section
PO Box 7879
Madison, Wisconsin 53707-7879

E-Mail: DFCharitableOrgs@dfi.wisconsin.gov

This form is required under Section 202.12, Wisconsin Statutes. Refusal to provide this information may result in the denial of this registration application. Personally identifiable information on this form may be matched against tax information, outstanding child and family support data and law enforcement agencies. Failure to complete this application completely and accurately may result in denial or revocation of registration, and any other penalties as provided by law.

This document can be made available in alternate formats upon request to qualifying individuals with disabilities.

Print

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