

Tennessee Secretary of State
Tre Hargett



Division of Business and Charitable Organizations
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243-1102

July 18, 2023

SUMMOR PENNINGTON
250 VENTURE CIRCLE
NASHVILLE, TN 37228

RE: Registration to Solicit Funds for Charitable Purposes

Organization Name: UNITED WAY OF MIDDLE TENNESSEE, INC.

CO Number: CO1

Renewal Date: 06/30/2024

Dear SUMMOR PENNINGTON :

Pursuant to the Tennessee Charitable Solicitations Act, T.C.A. § 48-101-501, *et seq.* the Tennessee Secretary of State has reviewed your application and is pleased to announce your organization's registration to solicit contributions has been **approved**.

The organization must maintain statutory compliance by submitting a renewal application and required fees on an annual basis. At that time you may be required to submit tax filings, financial statements, proof of IRS status, and other documents related to your organization and its fundraising activities. You can find additional information and submit additional filings online at <https://sos.tn.gov/charities>. The "CO" Number listed above will serve as your organization's charitable registration number and should be used when submitting any charitable filings or correspondence.

Please also be advised that if the organization's application or other provided information includes false, misleading or deceptive statements, appropriate action will be taken. Pursuant to the Tennessee Charitable Solicitations Act, a civil penalty of up to five thousand dollars (\$5,000.00) may be assessed for any violation.

Thank you for registering your organization and please do not hesitate to contact us with any questions.

Sincerely,

Tre Hargett
Secretary of State

Tracking Number
2023122711

Application to Renew Registration of a Charitable Organization



Tre Hargett
Secretary of State

Division of Business and Charitable Organizations

Department of State

State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2555
Fax: 615-253-5173
sos.tn.gov/charities

CO Number: CO1
Filed: 07/18/2023 04:40 AM
Tre Hargett
Secretary of State

Organization Information

Legal Name of the Charitable Organization: UNITED WAY OF MIDDLE TENNESSEE, INC.

Legal entity type of the Organization: Corporation

Business Services Control Number: 000065365

FEIN: 62-0533104

Initial Registration Date: 11/26/2008

Renewal Date: 09/28/2023

Has your fiscal year ending month changed since your last renewal?

☐ Yes ☒ No

Fiscal Year Ending Month: December

When and where was the organization legally established

Date: 07/01/1975

Country: USA

City/State: NASHVILLE, TN

County: Davidson

Has your Principal Office address changed since your last renewal?

☐ Yes ☒ No

Principal Office Address

250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228

Has your Mailing address changed since your last renewal?

☐ Yes ☒ No

Mailing Office Address

250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228

Contact Information for the Charitable Organization

Contact Name: SUMMOR PENNINGTON

Telephone Number: (615) 255-8501

Fax Number: (615) 780-2572

Email: summor.pennington@unitedwaygn.org

Website: www.unitedwaynashville.org

Current names used by the charity organization

2-1-1 TENNESSEE

DAVIDSON COUNTY LONG-TERM RECOVERY COMMITTEE

NASHVILLE AREA UNITED WAY

UNITED WAY OF CHEATHAM COUNTY

UNITED WAY OF GREATER NASHVILLE

UNITED WAY OF METROPOLITAN NASHVILLE

UNITED WAY OF NASHVILLE AND MIDDLE TENNESSEE

UNITED WAY OF WILLIAMSON COUNTY

Do you need to modify other names that the charity solicits under?

☒ Yes ☐ No

Other names used by your organization

2-1-1 TENNESSEE

DAVIDSON COUNTY LONG-TERM RECOVERY COMMITTEE

NASHVILLE AREA UNITED WAY

UNITED WAY OF CHEATHAM COUNTY

UNITED WAY OF GREATER NASHVILLE

UNITED WAY OF METROPOLITAN NASHVILLE

UNITED WAY OF NASHVILLE AND MIDDLE TENNESSEE

UNITED WAY OF WILLIAMSON COUNTY

UNITED WAY OF THE GREATER CLARKSVILLE REGION

Has the organization registered in any other state(s)?

☐ Yes ☒ No

Does the charity have other offices, chapters, branches, affiliates or a parent?

☐ Yes ☒ No

The category that best describes your organization

Z - Unknown, Unclassifiable

The charitable purpose of the organization

United Way of Greater Nashville unites the community and mobilizes resources so that every child, individual and family thrives.

Tax & Financial Information

Has your tax exempt status changed since your last renewal?

☐ Yes ☒ No

Last Fiscal Year Start: January 2022

Last Fiscal Year End: December 2022

Type of 990 Tax Form Filed: 990 (Long Form)

Gross Revenue

Direct and Indirect Public Contributions	\$ 18,061,155.00
Government Grants	\$ 24,983,900.00
Program Service Revenue	\$ 276,598.00
Special Events and Activities	\$ 0.00
Gross Sales of Inventory	\$ 0.00
Other Revenue	(\$ 113,156.00)
Total Revenue	\$ 43,208,497.00

Expenses

Total Program Expenses	\$ 41,670,765.00
Direct Expenses from Special Events	\$ 0.00
Cost of Goods Sold	\$ 0.00
Management and General Expenses	\$ 1,503,198.00
Fundraising Expenses	\$ 2,244,513.00
Other Expenses	\$ 0.00
Total Expenses	\$ 45,418,476.00
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Excess/Deficit For the Year (Total Revenue - Total Expenses)	(\$ 2,209,979.00)

Changes in Net Assets/Fund Balances

Net Assets/Fund Balances at Beginning of Year	\$ 61,559,934.00
Other Changes in Net Assets or Fund Balances	(\$ 6,809,897.00)
Net Assets/Fund Balances	\$ 52,540,058.00
Total Liabilities at End of Year	\$ 12,566,162.00
Net Assets/Fund Balances at End of Year	\$ 52,540,058.00

Solicitation Information

Have you been enjoined by any court from soliciting contributions?

☐ Yes ☒ No

Does your organization contract with or otherwise engage the services of any outside fundraising professional (such as a "professional fund-raiser," "paid solicitor," "fund raising counsel," or "commercial co-venturer")?

☐ Yes ☒ No

Officer Information

Do you need to modify the current officers?

☒ Yes ☐ No

List each officer, director, and trustee (at least 2 officers are required, and you must list officers who have or share the following titles: "Chief Financial Officer", "Custodian of Contributions", "Custodian of Final Distributions")

Summor Pennington
8115 Isabella Lane, Suite 1
Brentwood, TN 37027, USA
Title(s): Chief Financial Officer, Custodian of Contributions, Custodian of Final Distributions, Director

JAMES WEAVER
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Chairman

JOHN CROSSLIN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

ALBERTO GONZALES
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Vice Chairman

BRIAN HASSETT
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): President

BLAKE STINETTE
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Treasurer

DOUG ROHLER
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Secretary

DAVE WALTON
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

KRISTI MORROW
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

JUNAID ODUBEKO
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

BOB DITTUS
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

LEE BLANK
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

HEATHER ROHAN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

EMILY WEISS
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

ERIC STUCKEY
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

O'NEAL WIGGINS
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

TIM ADAMS

250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

NELSON ANDREWS
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

SCOTT BECKER
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

DAVID BRIGGS
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

KATE CHINN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

CHARLIE COOK
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

SARA CORREA
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

JOHN DOERGE
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

DAVID FREEMAN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

REV. ROBERT GARDENHIRE
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

RANDY GIBSON
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

JIM GINGRICH
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

LAUREL GRAEFE
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228

Title(s): Trustee

Dr. STUART GORDON
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

NEIL HAFER
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

TONY HEARD
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

Dr. SHANNA JACKSON
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

MILTON JOHNSON
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

Dr. GREGORY JONES
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

JENNEEN KAUFMAN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

GORDON KNAPP
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

WILLIAM KOCH, JR.
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

RICHARD MANSON
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

ROB MCNEILLY
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

Dr. CANDICE MCQUEEN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

BURKE NIHILL
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

SCOTT POHLMAN
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

DEB REINER
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

ANNE RUSSELL
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

BRIAN TIBBS
250 VENTURE CIRCLE
USA, NASHVILLE, TN 37228
Title(s): Trustee

Has any officer, director, manager, operator, or principal of the organization been the subject of an injunction, judgement, or administrative order or been convicted of a felony?

☐ Yes ☒ No

Signature

I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

Signed Electronically: Summor Pennington

Date: 07/17/2023

Title: Chief Fiscal Officer

I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

Signed Electronically: Brian Hassett

Date: 07/18/2023

Title: Chief Executive Officer



Tre Hargett
Secretary of State

Division of Business and Charitable Organizations

Department of State

State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2555
Fax: 615-253-5173
sos.tn.gov/charities

Date: 07/17/2023

Invoice: 2023-05907

Customer Information

SUMMOR PENNINGTON
UNITED WAY OF MIDDLE TENNESSEE, INC.
250 VENTURE CIRCLE
NASHVILLE, 37228

Tracking Number	Description	Amount Paid
2023122711	CH Charitable Renewal	\$ 10.00
Payment Details		
Fee Total:		\$ 20.00
Payment Total:		\$ 10.00
Amount Due:		\$ 0.00
Payment Method		
Payment Type: Credit Card		
Check/Confirmation Number: 3854742528		