

Tennessee Secretary of State
Tre Hargett



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

February 07, 2024

ERIN LEIGH BIRCH
1531 HUNT CLUB BLVD, SUITE 110
GALLATIN, TN 37066

RE: Registration to Solicit Funds for Charitable Purposes
Organization Name: UNITED WAY OF SUMNER COUNTY
CO Number: CO3730
Renewal Date: 12/31/2024

Dear ERIN LEIGH BIRCH :

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
2023137664

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: CO3730
Filed: 02/07/2024 12:23 PM
Tre Hargett
Secretary of State

Organization Information

Legal Name of the Charitable Organization: UNITED WAY OF SUMNER COUNTY

Legal entity type of the Organization: Other

Business Services Control Number: 000317425

FEIN: 31-1510208

CO Number: CO3730

Initial Registration Date: 12/01/1999

Renewal Date: 12/31/2023

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

☐ Yes ☒ No

Fiscal Year Ending Month: June

When and where was the organization legally established

Date: 10/01/1996

Country: USA

City/State: HENDERSONVILLE, TN

Has your Principal Office address changed since your last renewal?

☐ Yes ☒ No

Principal Office Address

1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066

Has your Mailing address changed since your last renewal?

☐ Yes ☒ No

Mailing Office Address

1531 HUNT CLUB BLVD, SUITE 110
USA, GALLATIN, TN 37066

Contact Information for the Charitable Organization

Contact Name: ERIN LEIGH BIRCH

Telephone Number: (615) 461-8371

Fax Number: (615) 461-8711

Email: erin@unitedwaysumner.org

Website: www.unitedwaysumner.org

Current names used by the charity organization

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

☐ Yes ☒ No

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

Other offices

Name: UNITED WAY WORLDWIDE

Type: Parent

Telephone: (703) 836-7112

Fax:

Reporting Financial Activities: No

Address

701 N. Fairfax Street
FAIRFAX, VA 22314, USA

The category that best describes your organization

P - Human Services

The charitable purpose of the organization

To improve lives by advancing opportunities for education, health and financial stability for all. To serve as a human-service non-profit serving residents of Sumner County. To tackle our community's most challenging problems with innovative and collective strategies involving a collation of partners providing support to create lasting change.

Tax & Financial Information

Has your tax exempt status changed since your last renewal?

☐ Yes ☒ No

Last Fiscal Year Start: July 2022

Last Fiscal Year End: June 2023

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

Gross Revenue

Direct and Indirect Public Contributions	\$ 948,494.00
Government Grants	\$ 94,268.00
Program Service Revenue	\$ 4,300.00
Special Events and Activities	\$ 18,086.00
Gross Sales of Inventory	\$ 0.00
Other Revenue	\$ 3,811.00
Total Revenue	\$ 1,068,959.00

Expenses

Total Program Expenses	\$ 696,138.00
Direct Expenses from Special Events	\$ 32,950.00
Cost of Goods Sold	\$ 0.00
Management and General Expenses	\$ 111,823.00
Fundraising Expenses	\$ 133,975.00
Other Expenses	\$ 0.00
Total Expenses	\$ 974,886.00
Excess/Deficit For the Year (Total Revenue - Total Expenses)	\$ 94,073.00

Changes in Net Assets/Fund Balances

Net Assets/Fund Balances at Beginning of Year	\$ 152,077.00
Other Changes in Net Assets or Fund Balances	\$ 1.00
Net Assets/Fund Balances	\$ 246,151.00
Total Liabilities at End of Year	\$ 679,406.00
Net Assets/Fund Balances at End of Year	\$ 246,151.00

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")

Mrs. Erin Birch
1531 Hunt Club Blvd, Suite 110
Gallatin, TN 37066, USA
Title(s): Chief Executive Officer

Julianna Adenaike
112 Ascot Court
Gallatin, TN 37066, USA
Title(s): Custodian of Contributions, Custodian of Final Distributions

Katie Brown
107 Timberline Drive
Hendersonville, TN 37075, USA
Title(s): Custodian of Contributions, Custodian of Final Distributions

Pat Conner
80 Hidden Point
Hendersonville, TN 37075, USA
Title(s): Custodian of Contributions, Custodian of Final Distributions

Stephen Bearden
1211 Bayview Drive
Gallatin, TN 37066, USA
Title(s): Custodian of Final Distributions, Custodian of Contributions

Theresa Dowell-Fuqua
125 Summerlin Drive
Gallatin, TN 37066, USA
Title(s): Custodian of Contributions, Custodian of Final Distributions

Timothy Mann
107 N. Laurens Way
Hendersonville, TN 37075, USA
Title(s): Custodian of Contributions, Custodian of Final Distributions

William Lamberth

P.O. Box 812
Portland, TN 37148, USA
Title(s): Custodian of Contributions, Custodian of Final Distributions

KIM BAKER
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

MARIBETH BEARFIELD
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

DANIELLE ROBINSON
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Chief Fiscal Officer

KELLEY CRESELIUS
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Vice President

SUSAN GAIMARI
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Secretary

SAM GORTON
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

CLAYTON HANNAH
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

DARRELL HUNT
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

JAMIE KHEIR
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

ANGEL PERSON
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Treasurer

BETH PICKEL
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

BEN ROBERTS
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

AMY SCOTT
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

LEN SILVERMAN
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): President

SUSANNAH WOOD
1531 HUNT CLUB BLVD., SUITE #110
USA, GALLATIN, TN 37066
Title(s): Custodian of Contributions, Custodian of Final Distributions

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: Erin Leigh Birch

Date: 02/05/2024

Title: Chief Executive 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: Danielle D Robinson

Date: 02/05/2024

Title: Chief Fiscal 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: 01/18/2024

Invoice: 2024-00512

Customer Information

ERIN LEIGH BIRCH
UNITED WAY OF SUMNER COUNTY
1531 HUNT CLUB BLVD, SUITE 110
GALLATIN, 37066

Tracking Number	Description	Amount Paid
2023137664	CH Filing Late Fee	\$ 20.00
2023137664	CH Charitable Renewal	\$ 10.00
Payment Details		
Fee Total:		\$ 30.00
Payment Total:		\$ 30.00
Amount Due:		\$ 0.00
Refunded Amount:		\$ 0.00
Payment Method		
Payment Type: Credit Card		
Check/Confirmation Number: 3865992154,3867278790		