

2025-2026 ANNUAL REPORT

UNITED IN STRENGTH



Pocono Mountains
UNITED WAY



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LETTER FROM THE PRESIDENT/CEO AND BOARD CHAIR

Dear Friends and Partners,

“Where do you see yourself in the work of United Way?”

If you have ever needed help during a hard season, or if you have ever had a mentor to guide you when the path felt unclear, then you already know the work of United Way.

The work of United Way is purposeful. It shows up strategically. It makes an impact locally.

The investment we make is not in a distant land; it is here where you and I live.

This past year, we have grown in our understanding that relationships matter A LOT! Our community is an ecosystem of businesses, schools, nonprofits, and hard-working families. They are all interactive. They exist in symbiotic relationships.

United Way is where people turn their values into action. If you believe children should be ready to learn, families should have support, and neighbors should know where to find help, then you already have a place in this work.

Your gift, your time, your voice, and your relationships all matter. They help create stability, opportunity, and hope for people across our community. The work of United Way is not done by one organization alone. It is made possible by people who choose to see themselves in the work and then step forward.

Thank you for being part of this story.

Our simple message as you read this Annual Report: Thank you for caring too.



Michael B. Tukeva
President/CEO



Chris Barrett
Chair, Board of Directors

BOARD OF DIRECTORS

Chris Barrett, *Chair*

Pocono Mountains Visitors Bureau

Michael Sherman, *Vice Chair*

Central Hudson

Tim Kresge, *Secretary*

East Stroudsburg University

Jamie Schmeelk, *Treasurer*

Pocono Mountains Visitors Bureau

Miguel Barbosa

East Stroudsburg University

Jason Bays

Camelback Resort

Jill D'Alessandro

St. Luke's Hospital - Monroe Campus

Aubrey Fleming

Gross McGinley

Pete Gray

Fidelity Bank

Don Hannig

Spread Eagle Associates

Debbie Kulick

Eastern Monroe Leasing & Training, Inc

Joe Pinto

Lehigh Valley Hospital – Pocono,
Part of Jefferson Health

Donna Roulston

Community Member

Rich Schlameuss

Monroe County Transit Authority

Lyman Winner

The Frogtown Chophouse

MISSION STATEMENT

Pocono Mountains United Way engages and mobilizes resources to improve lives through accelerated community change.

VISION

A community where everyone has ample opportunities for quality education, good health, and financial stability.



PROGRAM HIGHLIGHTS

Investment is only the beginning. Real impact happens when resources are transformed into action that strengthens lives and communities. The stories and results in this report demonstrate how your trust and generosity became measurable progress. As we look toward the upcoming year, we remain committed to turning every investment into lasting change.

EDUCATION

GENERATION NEXT

82
STUDENTS
PARTICIPATED

The future doesn't change by chance. It changes when young people are given the tools, encouragement, and opportunities to succeed. This year, 82 high school students participated in mentoring, workshops, and hands-on learning experiences that helped turn their aspirations into achievable goals. Their progress reflects what is possible when a community comes together to create opportunities.



20 sophomores **41** juniors **21** seniors

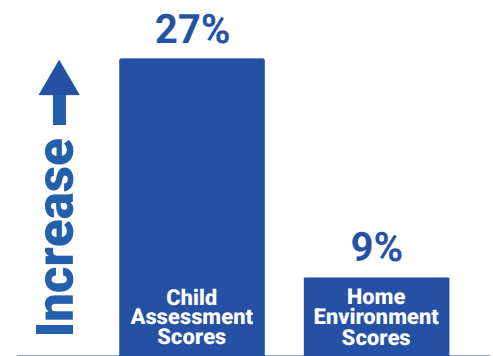
Graduating seniors in the Class of 2026 included 19 going on to college/university and 2 planning to attend trade school/military service. Graduates were accepted to 44 colleges and universities, including Temple University, Pennsylvania State University, New York University, Drexel University, and Rutgers University.

"Generation Next has really guided me through high school and helped me in my struggle through school. It guided me through the college process and taught me many things I didn't know as a first gen student." - Generation Next Student

SMILE IN-HOME MENTORING

60 children/families received mentoring.

Strong families create strong futures. Through the SMILE In-Home Mentoring Program, caregivers receive the guidance, encouragement, and practical support needed to build nurturing home environments where children can thrive. As families grow in their confidence and stability, children make meaningful developmental gains—demonstrating the lasting difference that support can make.



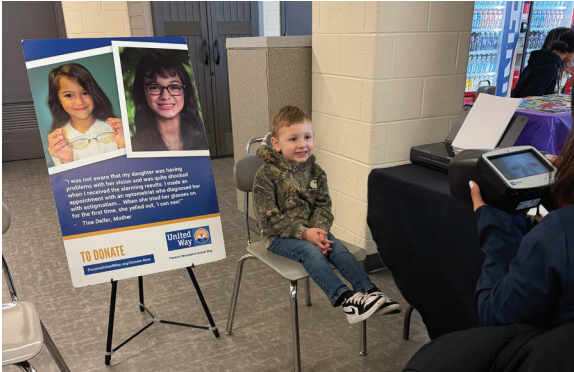
"I could not find a pre-school that was affordable and was very happy to enroll my child in the SMILE home-mentoring program. This will help my child learn the preschool schools needed for kindergarten." - SMILE Program Parent

HEALTHY START EARLY CHILDHOOD SCREENINGS



3,313 TOTAL SCREENINGS

15% resulted in referrals for further evaluation
1,732 children received vision health education



478
CHILDREN
ENROLLED

197
GRADUATED
PROGRAM

A lifelong love of learning begins long before the first day of kindergarten. Through the simple act of delivering a new book to a child's home each month, families are encouraged to read together, build language skills, and foster curiosity. This year, nearly 500 children participated in the program, with 197 celebrating their graduation at age five, entering kindergarten with a stronger vocabulary, greater confidence, and a solid foundation for lifelong learning.

FIRE SAFETY TRAININGS

Free trainings provided to
childcare employees.

5 TRAININGS
CONDUCTED

86 PARTICIPANTS



BACKPACK DISTRIBUTIONS

2,532
BACKPACKS
WERE DISTRIBUTED



HOUSING

PHARE RENTAL ASSISTANCE PROGRAM

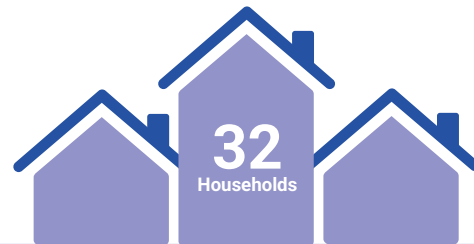
\$132,543

DISTRIBUTED TO MONROE,
PIKE, CARBON & WAYNE
COUNTY RESIDENTS



LANDLORD INCENTIVE FUND PILOT PROGRAM

Through an innovative partnership, the Landlord Incentive Fund Pilot Program was able to assist 32 households to overcome barriers and obtain secure, safe, and permanent housing.



FINANCIAL STABILITY

EITC TAX CREDIT SCHOLARSHIPS

37 Pre-K & K-12
Scholarships Awarded

22 Before and After School Care
Scholarships Awarded

65 Children Attended ESASD
Summer STEAM-R Program



PRE-K TUITION SUBSIDY

118 CHILDREN & THEIR FAMILIES
RECEIVED ASSISTANCE



Every child deserves the opportunity to begin school ready to succeed, and every parent deserves the opportunity to provide for their family. The Pre-K Tuition Subsidy program helped 118 children attend high-quality pre-k while giving their parents the stability and flexibility to remain in the workforce. By removing barriers to early learning, families were able to build a stronger foundation for the future.

INFORMATION & REFERRAL

POCONOINFO HELPLINE

Top needs reported by callers:
Rental Assistance, Utility/Fuel Assistance,
Housing/Shelter, Cash Assistance



RESOURCE INVESTMENT

Community Investment Through Volunteer Leadership

Each year, Pocono Mountains United Way engages a diverse group of community volunteers to lead a strategic and transparent investment process that supports critical human service programs throughout Monroe County.

These volunteers establish funding priorities, oversee the grant application and evaluation process, and provide funding recommendations to our Board of Directors. Their insights ensure that resources are directed to programs with the greatest potential for measurable impact.

The commitment and expertise of our volunteers are essential to this process. By lending their time and perspectives, they help us invest wisely, respond to the most pressing local needs, and strengthen the well-being of our entire community.

RESOURCE INVESTMENT COMMITTEE & INVESTMENT PROCESS VOLUNTEERS

Dr. Clare Lenhart*, Committee Chair	Theresa Jackson	Donna Roulston*
Eddy Acosta	Sheila Jefferies Battle	Dinoli Rowlands*
Legitime "Lee" Bourjolly	Shidae Jones	Sarah Beth Sanchez*
Beverly Braxton-Cannon*	Yvette Keitt	Ashley Stevens*
Jonathan Carrero	Lorena Koszarek	Niasha Strachan
Stephanie Clawson	Debbie Kulick*	Lucy Terry-Lopez
Kody Crosson	Joanne Leasure*	Malia Thau
Lucas DeBartolo	Griffin Libby	James Thomas
Sierra DiCupe	Lorette Miller	Kimberly Werner
Lesly Estil	Tara Nylander	Valerie Williams
Chris Field	Nafisat Oseni	Tanya Williams
Frances Gourdet	Katerine Palacios	Lyman Winner*
Debbie Harrison*	Laura Marie Pastore	Rachel Wyckoff

** Denotes Resource Investment Committee Members*

"Volunteering makes life more fulfilling. I love giving back to those in need because I know how it feels to need. I love the connections made."

**Resource
Investment Volunteer**

FUNDED AGENCIES AND PROGRAMS

FY 2026/2027 RESOURCE INVESTMENT GRANTS

Funded Agency	Program	Investment Amount
American Red Cross	Disaster Services	\$13,500
Community Action Committee of the Lehigh Valley	Second Harvest Food Bank	\$21,000
Lehigh Valley Hospital - Pocono	Moving Beyond Depression	\$15,000
Monroe County Habitat for Humanity	Home Preservation Program	\$21,000
Monroe County Meals on Wheels	Home Delivered Meals	\$18,825
Pleasant Valley Ecumenical Network	Diaper and Menstrual Hygiene Program	\$14,325
Pocono Area Transitional Housing	Transitional Housing Program	\$23,930
Pocono Services for Families and Children	Self-Pay Program	\$22,850
Resources for Human Development	Crossroads' Street 2 Feet Program	\$33,825
Safe Monroe	Domestic Violence Shelter	\$29,850
Sights for Hope	Transportation Program	\$10,000
St. Luke's Hospital Monroe Campus	Perinatal Mental Health Support	\$20,000
The Growing Place Child Care Centers	Special Needs Program	\$19,325
The Salvation Army East Stroudsburg Corps	Emergency Shelter & Housing Program	\$23,570
The Salvation Army East Stroudsburg Corps	Food Pantry and Soup Kitchen	\$18,000

Total Investments

\$305,000



COMMUNITY LEADERSHIP

Leading the Way on Housing

Housing stability requires more than responding to individual crises, it takes a coordinated system to help people find and keep safe, affordable housing. Pocono Mountains United Way works to strengthen that system by building the partnerships, tools, and leadership needed to meet this challenge.

Over the last year, groundwork has continued to be laid for long-term community solutions through the creation of Community Development of the Poconos, a Community Housing Development Organization (CHDO). This new organization will be able to serve as a key vehicle in driving investment into affordable housing for years to come.



In addition, Pocono Mountains United Way has continued to staff roles that support housing services agencies serving our community. The Coordinated Entry System (CES) Regional Manager, Liana Riutort, provides dedicated leadership to improve collaboration, streamline referrals, and strengthen access to housing services across Carbon, Monroe, Pike and Wayne Counties. Our Housing Locator, LaTania Frasier, works to identify affordable housing units, keeps a searchable database up to date for use by case managers, and maintains key relationships with landlords. These functions act as capacity-builders for local housing services agencies, ensuring that they can better use their resources to directly serve clients in need.



\$1.3M+
SECURED IN HOUSING SUPPORT

And finally, Pocono Mountains United Way has secured over \$1.3 million to date in housing support for eligible households in Carbon, Monroe, Pike and Wayne Counties. These dollars fund homeless prevention, eviction mediation, and coordinated entry services to keep residents in these counties housed.

DAY OF CARING

Every year Pocono Mountains United Way increases community involvement and commitment by coordinating a day for businesses and individuals to volunteer while learning more about the agencies that make Monroe County a better place to call home.



190+

INDIVIDUALS CAME OUT TO
SUPPORT THE COMMUNITY
DURING PMUW'S DAY OF CARING



VOLUNTEERING MEANS....

"I enjoy volunteering because it gives me the chance to make a difference in other's lives and small acts of service can brighten someone's day"

15

LOCATIONS

VOLUNTEERS HELPED WITH PROJECTS
ACROSS ALL OF MONROE COUNTY



WHY I VOLUNTEER....

"I choose to volunteer because I think community is important. Times have been hard for a lot of people and giving back is something I can do."

500+

HOURS WERE DONATED TO
HELP OUR COMMUNITY!



2025 STATEMENT OF FINANCIAL POSITION

2025 ASSETS

CURRENT ASSETS

Cash	\$1,289,707
Certificates of Deposit	789,917
Accounts Receivable	11,974
Grants Receivable	311,400
Pledges Receivable, net	65,866
Prepaid Expenses	24,131

NONCURRENT ASSETS

Investments	1,012,255
Right-of-Use Asset – finance lease	1,201
Land, Building, and Equipment, Net	590,395

TOTAL ASSETS

\$4,096,846

2025 LIABILITIES

CURRENT LIABILITIES

Accounts Payable and Accrued Expenses	\$235,303
Due to Member Agencies	329,956
Donor Choice Designated to Agencies and Other United Ways	1,463
Deferred Revenue	67,260
Finance Lease Liability	510

NONCURRENT LIABILITIES

Finance Lease Liability	520
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TOTAL LIABILITIES

\$635,012

2025 NET ASSETS

Without Donor Restrictions:	
Undesignated	2,284,101
Board Designated	185,135
Total W/out Donor Restrictions	2,469,236
Total With Donor Restrictions	992,598

TOTAL NET ASSETS

\$3,461,834

TOTAL LIABILITIES AND NET ASSETS

\$4,096,846

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

	Without Donor Restrictions	With Donor Restrictions	Total
SUPPORT AND REVENUE			
Contributions & Grants	\$1,423,707	\$667,762	\$2,091,469
Current Campaigns	663,940	112,863	746,803
Special Events, Net of Direct Expenses of \$5,452	908	-	908
Contributed Non-Financial Assets	304,161	-	304,161
Other Income	8,200	3,500	11,700
Net Assets Released from Restrictions	601,720	601,720	-
Total Support and Revenue	2,972,636	182,405	3,155,041
EXPENSES			
Programs and Events	2,685,871	-	2,685,871
General & Administrative	178,141	-	178,141
Fundraising	158,051	-	158,051
Total Expenses	3,022,063	-	3,022,063
Income (Loss) From Operations	49,427	182,405	132,978
Investment Return	120,768	-	120,768
Change in Net Assets	71,341	182,405	253,746
NET ASSETS AT THE BEGINNING OF YEAR	\$2,397,895	\$810,193	\$3,208,088
NET ASSETS AT END OF YEAR	\$2,469,236	\$992,598	\$3,461,834

BUSINESS SERVICES AND INVESTMENT OPPORTUNITIES

Goal-Based Investing

Marketing and Public Relations

Provide financial sponsorships, in-kind donations, and volunteers at events, or provide a portion of revenue from sales as a contribution. We help promote your involvements to make the public aware.

Corporate Social Responsibility

Meet your internal and mandated community support goals through corporate donations, participation in PA's Educational Improvement Tax Credit (EITC) and Opportunity Scholarship Tax Credit (OSTC) programs, and other means that work for your business.

We aim to be a true partner to business that benefits all parties involved: the business, United Way, and most importantly, the community we both serve.

How Much to Invest

Corporate Social Responsibility and Philanthropy is an important consideration for all businesses and may be required in certain cases. We can help you meet your needs and goals.

Where to Invest

General Operating Fund

Trust-based unrestricted funding that allows us to be nimble and responsive.

Endowment Fund

To ensure we are here to serve in perpetuity.

Programs and Services

Make an impact in areas most important to your business.

Events

Provide the funding and volunteers to make community events successful.

Why Invest

- Business legacy and community perception
- Employee perception and retention
- Brand awareness and marketing value
- Potential tax benefits
- Personal feeling of helping our neighbors
- Long-term benefits to our economy and jobs



Budgeting Your Investment

Marketing

Sponsorships and In-Kind donation

Corporate Social Responsibility Opportunity

Workforce development and Workplace Giving Campaigns

Community Support

Corporate donations, sponsorships, and program support

Tax Incentives

Educational Improvement Tax Credit (EITC) as a tax benefit

GOVERNMENT & CORPORATE LEADERSHIP INVESTORS

CORNERSTONE SOCIETY

AllOne Charities	East Stroudsburg Area School District	United States Department of Education
Carbon-Monroe-Pike Mental Health/ Developmental Services	Monroe County	Weiler Abrasives Group
CLA Foundation	Pennsylvania Housing Finance Agency	Weiler Family Foundation
Community Care Behavioral Health	Pocono Mountains Visitors Bureau	
	Sanofi	

CAPSTONE SOCIETY

Aetna Better Health	Mattioli Foundation	The Ann & Joseph Farda Foundation
Camelback Resort	Mount Airy Foundation	UGI Utilities, Inc.
Clinton Foundation	Mount Airy Casino Resort	Waste Management
Highmark Foundation	PNC Financial Services Group, Inc.	Wells Fargo
I2M	Pocono Mountain School District	
Lehigh Valley Hospital – Pocono, Part of Jefferson Health	PPL Electric Utilities	
	St. Luke's University Health Network	

TOP SUPPORTERS

AAA North Penn	First Northern Bank & Trust Co.	PPL Foundation
Abeloff Auto Group	Givinga Foundation, Inc	Ray Price Cars
Austin Healey Enclave	Hackett Philanthropies Foundation	Rotary Club of The Stroudsburgs
Barley Creek Brewing Company	HNL	Scranton Area Community Foundation
Blue Ridge Communications	The Lester G Abeloff Foundation	SECA State Employee Combined Appeal
Brodhead Creek Regional Authority	M&T Bank Wilkes Barre	Stroudsburg Area School District
Bruce, Trudi and Sarah Denlinger Family Fund	Met-Ed, A First Energy Company	The Lester G Abeloff Foundation
Buck Hill Community Services Committee	Monroe County Transit Authority	Tobyhanna Elementary Sunshine Club
Cohen Feeley	Mountain View Vineyard & Distillery	Wayne Bank
Cove Haven Entertainment Resort	NBT Bank	Wealth Strategies and Management, LLC
Enterprise Holdings	Paradise Stream Resort	Weis Markets Inc.
First Keystone Community Bank	Pocono Builders Association	Wind Gap Electric, Inc.
First National Bank (PA)	Pocono Mountains Economic Development Corp.	

CORPORATE SUPPORTERS

AT&T	Members 1st Federal Credit Union	Price Chopper/Market 32
East Stroudsburg University	Monroe County Public Libraries	Target 1260
East Stroudsburg University Foundation	Northampton Community College - Pocono	UPMC University of Pittsburgh Medical Center
Engle Hambright & Davies, Inc.	Peoples Security Bank & Trust	Wayne County Human Services Agency
FedEx Freight	Pocono Mountains Industrial Park Authority	
Guardian Life		

Please note that in some cases, we are unable to receive the names of donor-investors and thus cannot display them. If your organization is missing, please contact us at info@poconounitedway.org right away.

INVEST BY GIVING

At Pocono Mountains United Way, our mission is driven by a single, unwavering truth: our community is stronger because of you.

As a community investor, your financial contributions do more than fund programs — they fuel lasting change. Your support enables us to invest in vital services that improve education, health, and financial stability across Monroe County. The return on that investment is a better-prepared workforce, stronger families, healthier individuals, and a more resilient local economy.

Each year, thousands of lives are directly impacted by the work we do together. That impact reaches neighbors, coworkers, employees, and families across Monroe County. Many are just one unexpected event away from financial crisis, and your support ensures we can provide a hand up when it's needed most.

Together, we address not only the immediate needs of individuals and families, but also the broader, systemic challenges that affect our community as a whole. Whether it's affordable housing, mental health support, or workforce development, your investment enables us to take a long-term view while remaining agile in the face of urgent needs.

Your role goes beyond financial giving. As a thought partner, you help us develop innovative solutions and sustain the programs that deliver proven results. From early childhood education to college access, from crisis support to job readiness — you are at the heart of every success story.

Every dollar you give is an investment in a stronger Monroe County:

- When a family stays housed and employed, our economy benefits.
- When a first-generation student attends college, our future grows brighter.
- When a child enters school ready to learn, our graduation rates rise.

To continue fueling this impact, we invite you to renew your gift, deepen your involvement, and stay united in strength with us. Your commitment is a powerful reminder that lasting change starts locally. And in a time when connection and collaboration are more important than ever, we are proud to move forward together under this year's theme:

United in Strength.

Together, we are UNITED IN STRENGTH, as we build a community where everyone can thrive.



HOW TO GET INVOLVED

VOLUNTEER Your Time and Talent

Volunteering makes a difference. It makes a difference in the community, and it makes a difference in your life. Whether you volunteer as an individual or with a group; whether it is a one-time event or a skilled ongoing effort; it makes a difference. Here are just a few of the benefits to you, your organization, and to the community:

- Creates a sense of community: Volunteering helps connect people in a community by bringing them together to work towards a common goal. Connection and shared purpose create community.
- Strengthens communities: Volunteering can help further strengthen communities by building relationships between people and organizations that can lead to more collaboration and cooperation in the future.
- Promotes community engagement: Volunteering can promote civic engagement by encouraging people to get involved in their community and take an active role in shaping its future.
- Sense of fulfillment and purpose: Volunteering can give you a sense of fulfillment by helping others and making a positive impact on their lives.
- Promotes physical and mental health: Volunteering can help keep you physically active, and research shows that a sense of purpose and connection with your community is one of the biggest factors in overall health and happiness.

“Giving back to others, giving your time and energy for someone else is truly satisfying. It lifts my spirits and fills my cup. It is truly the gift that keeps on giving!”

Cynthia B.

Volunteer Opportunities

1. Visit www.volunteeronrore.org for an updated list of opportunities in our county. All nonprofits are welcome to post opportunities, and all residents, organizations, and businesses are encouraged to sign up for these opportunities any time that works.
2. Plan to be a part of Day of Caring, held every year in September. This one-day event brings hundreds of people together for a day to celebrate community by collaborating on a variety of projects.
3. Contact individual nonprofits for other opportunities that may not be listed online. Skilled workers, board members, and custom options may be available.

ADVOCATE for Change

Use your voice to advocate for quality education, good health, and financial mobility for everyone in Monroe County. Follow us on social media, and check the Advocacy section of our website for more information and opportunities.



INDIVIDUAL INVESTMENT OPPORTUNITIES

How to Invest

Cash-Based Investments

Make a one-time or recurring donation using your credit card, digital wallet, or direct bank withdrawal.



**SCAN TO
DONATE TODAY**

[PMUW.org/donate-now](https://pmuw.org/donate-now)

Where to Invest

General Operating Fund

Trust-based unrestricted funding that allows us to be nimble and responsive.

Endowment Fund

To ensure we are here to serve in perpetuity.

Programs and Services

Make an impact in areas most important to you.

Events

Provide the funding and volunteers to make community events successful.

Wealth-Based Investments

There are a variety of investment vehicles that leverage wealth rather than cash, which may have additional tax benefits as well. More information is shown on the next page.

- Appreciated Assets
- Donor-Advised Funds (DAF)
- Pooled Income Funds
- Charitable Gift Annuity
- Qualified Charitable Distribution (QCD)
- Charitable Remainder Trust

Legacy Giving

- Establish your legacy to last over time
- Create a private fund or foundation
- Personal bequest through your will

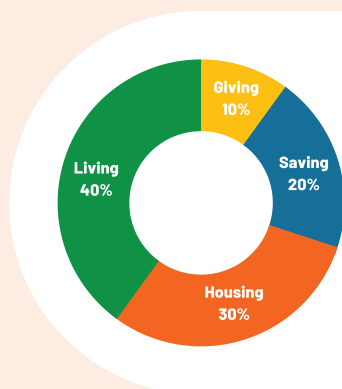
Why Invest

Short-term Return	Long-term Return
Feeling of helping your neighbors	Stronger economy
Potential tax benefits	Potential tax benefits
Live out your personal values	Legacy



How Much to Invest

Philanthropy is a very personal decision. Recommendations reach as high as 10% or more of annual income. 2% can be a useful starting place in the decision making process.



Level	Amount
Tocqueville	\$10,000+
Platinum	\$5,000-9,999
Gold	\$2,500-4,999
Silver	\$1,000-2,499
Bronze	\$500-999

The information below is for informational purposes only and should not be considered financial advice or a recommendation. You can consider bringing these topics to your financial advisors to determine the best course of action for you.

Appreciated Assets

If you donate long-term appreciated assets like bonds, stocks or real estate to charity, you generally don't have to pay capital gains, and you can take an income tax deduction for the full fair-market value. It can be up to 30 percent of your adjusted gross income. Stocks and bonds that have increased in value can be a powerful giving tool because you get an income tax deduction and avoid the capital gains tax. When you give securities directly to a qualified charity, your income tax deduction is based on the security's fair market value and can offset up to 30% of your adjusted gross income (AGI), which could reduce your tax bill. Also, by giving appreciated securities directly (or through a donor-advised fund), neither you nor the charity pays a capital gains tax on the donated securities. For some donors, this means you can give more than if you had sold the security, paid the tax and then given the remaining cash.

Charitable Gift Annuity

A charitable gift annuity is a contract between a donor and a charity with the following terms: As a donor, you make a sizable gift to charity using cash, securities or possibly other assets. In return, you become eligible to take a partial tax deduction for your donation, plus you receive a fixed stream of income from the charity for the rest of your life.

Charitable Qualified Distribution

A QCD is a direct transfer of funds from your IRA custodian, payable to a qualified charity. QCDs can be counted toward satisfying your required minimum distributions (RMDs) for the year starting at age 72, if certain rules are met. In addition to the benefits of giving to charity, a QCD excludes the amount donated from Adjusted Gross Income, which is unlike regular withdrawals from an IRA. Keeping your Adjusted Gross Income lower may reduce the impact of certain tax credits and deductions, including Social Security and Medicare. Also, QCDs don't require that you itemize, which due to the recent tax law changes, means you may decide to take advantage of the higher standard deduction, but still use a QCD for charitable giving.

Charitable Remainder Trust

A Charitable Remainder Trust is a gift of cash or other property to an irrevocable trust. The donor receives an income stream from the trust for a term of years or for life and the named charity receives the remaining trust assets at the end of the trust term. The donor receives an immediate income tax charitable deduction when the CRT is funded based on the present value of the assets that will eventually go to the named charity.

Donor-Advised Funds

A donor-advised fund, or DAF, is an investment account for the sole purpose of supporting charitable organizations you care about. When you contribute cash, securities or other assets to a donor-advised fund at a public charity, you are generally eligible to take an immediate tax deduction. Then those funds can be invested for tax-free growth, and you can recommend grants to virtually any IRS-qualified public charity. Donor-advised funds are the fastest-growing charitable giving vehicle in the United States because they are one of the easiest and most tax-advantageous ways to give to charity.

Pooled Income Fund

A pooled income fund is a type of charitable trust established and maintained by a qualified nonprofit organization. The fund receives irrevocable contributions from one or more individuals, a family or a charity. Donors may qualify for an immediate partial tax deduction, based on their life expectancy and anticipated income stream, but they must pay income tax on the income stream from the fund each year.



Pocono Mountains
UNITED WAY

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Stroudsburg, PA 18360

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Fax: 570.234.3469

 PoconoUnitedWay.org

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