



## **DONATION FAQs**

### **Where can I learn more about the effect my donations have on the WDA Foundation?**

If you have questions on any aspect of the WDA Foundation, you can go to [wda.org/wda-foundation](http://wda.org/wda-foundation) or contact Vicki Bohman at [vbohman@wda.org](mailto:vbohman@wda.org) or 414-755-4198.

### **Are both restricted and unrestricted donations tax-deductible?**

Each donation, whether restricted or unrestricted, is tax-deductible to the full extent of the law when it is made to a qualified 501(c)(3) charitable organization.

### **Which type of donation, restricted or unrestricted, is most important to the well-being of a nonprofit organization?**

Both are vitally important to the well-being of a nonprofit. Donations that are specifically designated to a program, a scholarship or a service ensure that these important efforts are there when they are needed. Unrestricted gifts more often support operations such as administration and fundraising...functions that may not be exciting, but which are extremely important to ensure good management and future sustainability of the organization.

### **Which type of donation, restricted or unrestricted, is easier to obtain?**

Donors are often more likely to make restricted donations because supporting a program feels more "concrete." This attitude is especially true of grant-making foundations and corporations. Unfortunately, the local charity that may be able to raise thousands of dollars to support a specific program or to purchase new office space may not be able to scrape together enough money to keep the organization running efficiently or to keep its donors informed due to a lack of general funds.

## **Is the WDA Foundation a tax-deductible charity?**

Yes, the WDA Foundation, Inc. is a 501(c)(3) charitable organization. It is fully recognized as such by the federal and state governments. The foundation is a legal subsidiary of the Wisconsin Dental Association.

## **What is the foundation's tax ID number?**

The WDA Foundation's tax identification number is: 39-0965289

## **Is my donation tax-deductible?**

Yes, each donation to the WDA Foundation is tax-deductible to the full extent of the law.

## **What programs are administered under the WDA Foundation?**

The WDA Foundation is the umbrella charitable organization for the following programs:

- Mission of Mercy
- Donated Dental Services
- Grant program
- Scholarship program

## **How do I make a direct donation?**

There are many simple ways to make a direct donation. If making your donation by check, please make the check payable to the Wisconsin Dental Association Foundation, Inc.

You can [print and submit a donation form](#) or simply include a note about any specific donation requests.

Send donations to:

The WDA Foundation, Inc.  
6737 W. Washington St., Suite 2360  
West Allis, WI 53214

You will receive an acknowledgement letter via U.S. mail, which should be kept as a tax receipt. Acknowledgements can be sent via email upon request.

Donations of any amount are gratefully accepted at any time of year.

If you are making a donation by credit card (Visa, MasterCard or Discover) you can use the same process or call 414-755-4198 to donate by phone or donate online [here](#).

## **Can I designate my donation to support a specific program?**

Yes. If you would like your donation to be used only for a specific WDA Foundation program, please indicate that with your donation. If a program is not indicated, funds will be used where the need is the greatest.

## **I would like to make my donation an “Honor” or “Memorial” donation. How do I indicate that and how is the honoree or family notified?**

An Honor or Memorial donation is the perfect way to recognize a friend, colleague or loved one. Donors receive an acknowledgement for tax purposes and the individual or family of the individual being recognized will receive a letter announcing that you have made a gift in that person's name. The amount donated is NOT disclosed to the honoree.

To make an Honor or Memorial donation, please include a note indicating if the donation is:

- “In Honor” or “In Memory”
- The name of the individual (or event) being recognized
- The name and address of the individual who should receive notice of the gift

## **How do I make a donation of stock?**

If you would like to [donate stock](#) to the WDA Foundation, please contact Executive Director Vicki Bohman at 414-755-4198 to indicate your intent. You will be given instructions on how to make the transfer.

## **Why is it important for me to make a donation to the Wisconsin Dental Association Foundation on my dues statement? Is it tax-deductible?**

Each donation made on a WDA dues statement is unrestricted and creates a financial base for the foundation; allowing for efficient management and effective use of funds. It also impacts the foundation's ability to provide grants to nonprofit dental programs and scholarships to dental and dental hygiene students. The WDA Foundation is a qualified 501(c)(3) charitable organization and every donation is tax-deductible to the fullest extent of the law.

## **There is a suggested donation of \$60. Can I make a smaller or larger donation with my dues statement?**

Absolutely. The \$60 donation is simply a suggestion. Most WDA members who make a donation on their dues statement give the suggested donation, because it is a simple way to show support. When opting for the six installments payment plan, your donation is broken down to just \$10 per month making it affordable for almost everyone.

If your budget allows for a larger donation or you would like to show support, but \$60 is not practical for you, you may indicate a different donation amount on your dues statement and adjust your payment accordingly.

## **What is planned giving?**

Planned giving is the process of legally providing for a donation to your favorite charity that will benefit the charity at a future time.

The simplest form of planned giving is to include a provision in your will naming the charity to a share of your assets. This is known as a bequest. You also can name a charity as a beneficiary in a life insurance policy, pension plan, 401(k) or IRA. A planned gift can be a set dollar amount or a percentage of your assets after your family has been provided for.

## **What is the Legacy Society and how do I become a member?**

The WDA Foundation Legacy Society is an elite recognition of those individuals who have named the foundation in their planned giving.

You can become a member by first working with your attorney or accountant to include the WDA Foundation in your estate. When that has been completed, simply complete the Legacy Society Letter of Intent and return it to the foundation. The Letter of Intent is not a binding contract, but rather a means of informing the foundation of your actions. When a completed letter is received, you will be named as a Legacy Society member. Your name will be listed as such in future Donor Honor Rolls and you will receive a small token of appreciation that signifies your commitment to the future of dentistry.

## **Must I tell the WDA Foundation how much I plan to designate to the Legacy Society?**

No. To be a member of the Legacy Society, the foundation must simply have a written statement of your intent to support the foundation in your planned giving.

*For answers to other questions not listed above, contact WDA Foundation Executive Director Vicki Bohman at 800-364-7646 or [vbohman@wda.org](mailto:vbohman@wda.org).*