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Form 990

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2009

Open to Public Inspection

A For the 2009 calendar year, or tax year beginning 10-01-2009 and ending 09-30-2010

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Terminated

☐ Amended return

☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization

AGEOPTIONS INC

Doing Business As

Number and street (or P O box if mail is not delivered to street address)

1048 lake street No 300

Room/suite

City or town, state or country, and ZIP + 4

oak park, IL 60301

F Name and address of principal officer

JONATHAN LAVIN

1048 lake street No 300

oak park,IL 60301

H(a) Is this a group return for affiliates?

☐ Yes ☒ No

H(b) Are all affiliates included?

☐ Yes ☐ No

If "No," attach a list (see instructions)

H(c) Group exemption number

D Employer identification number

36-2806193

E Telephone number

(708) 383-0258

G Gross receipts \$

15,821,608

I Tax-exempt status

☒ 501(c) (3)

⚡(Insert no)

☐ 4947(a)(1) or

☐ 527

J Website:

www AGEOPTI ONS org

K Form of organization

☒ Corporation

☐ Trust

☐ Association

☐ Other

L Year of formation

1974

M State of legal domicile

IL

Part I

Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities Provides comprehensive services, leadership and advocacy to older adults and their caregivers				
	2	Check this box ☒ if the organization discontinued its operations or disposed of more than 25% of its net assets				
	3	Number of voting members of the governing body (Part VI, line 1a)	3	19		
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	19		
	5	Total number of employees (Part V, line 2a)	5	133		
	6	Total number of volunteers (estimate if necessary)	6	45		
Revenue	7a	Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	0		
	b	Net unrelated business taxable income from Form 990-T, line 34	7b	0		
	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year		
			15,688,994	15,697,262		
				0		
			-27,578	813		
			21,723	54,632		
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	15,683,139	15,752,707		
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	11,948,373	12,920,609		
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0		
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	2,512,505	2,700,603		
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	1,688	0		
	b	Total fundraising expenses (Part IX, column (D), line 25) ⁰				
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	915,366	698,108		
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	15,377,932	16,319,320		
	19	Revenue less expenses Subtract line 18 from line 12	305,207	-566,613		
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year	End of Year		
			4,401,849	4,513,019		
			1,996,862	2,645,754		
			2,404,987	1,867,265		

Part II

Signature Block

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Signature of officer

2011-05-19

Date

DIANE SLEZAK VICE PRESIDENT & COO

Type or print name and title

Paid Preparer's Use Only

Preparer's signature

Andrew Twardowski

Date

Check if self-employed ☐

Preparer's identifying number (see instructions)

Firm's name (or yours if self-employed), address, and ZIP + 4

SIKICH LLP

998 CORPORATE BLVD

AURORA, IL 60502

EIN

Phone no (630) 566-8400

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat No 11282Y

Form 990 (2009)

Part III Statement of Program Service Accomplishments

1

Briefly describe the organization’s mission

AgeOptions is committed to improving the quality of life and maintains the dignity of older persons and those who care about them through leadership and support, community partnerships, comprehensive services, accurate information and powerful advocacy

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes

☒ No

If “Yes,” describe these new services on Schedule O

3

Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes

☒ No

If “Yes,” describe these changes on Schedule O

4

Describe the exempt purpose achievements for each of the organization’s three largest program services by expenses

Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a

(Code) (Expenses \$ 8,044,486 including grants of \$ 7,695,421) (Revenue \$)

AgeOptions is committed to improving the quality of life and maintaining the dignity of older persons and those who care about them AgeOptions is a not-for-profit corporation designated by the Illinois Department on Aging as the Area Agency on Aging for suburban Cook County As a catalyst for connecting older persons and caregivers to resources and service options, we are nationally recognized for our innovative programming, networking with community based senior service agencies, and advocacy efforts on behalf of older persons Over the past 35 years, AgeOptions has established a reputation for meeting the needs, wants and expectations of the senior population in suburban Cook County Our purpose is to connect adults, aged 60 and over, with resources and options for care so that they can have a full range of choices and live their lives to the fullest Our role is to plan, fund, coordinate and advocate for this special group and their family caregivers We pride ourselves in advocating for seniors in the areas such as Elder Justice, Caregiving, Nutrition, Medicare, Employment and Access to Benefits Our primary service area, suburban Cook County, includes 130 communities within 30 townships surrounding Chicago - home to more than 2 5 million residents and 454,000 older adults The Older Americans Act Title III Social, Nutrition, Caregiver, and Health Promotion/Disease Prevention Services are core services provided in all 30 townships of suburban Cook County In FY 2010, 86,036 older adults and caregivers were served through the wide range of Title III programs including home delivered and congregate dining, Nursing Home Ombudsman, legal service, and the other social services

4b

(Code) (Expenses \$ 1,214,680 including grants of \$ 1,214,680) (Revenue \$)

AgeOptions contracts with ten (10) Elder Abuse Provider Agencies in suburban Cook County that investigate and intervene in cases of possible elder abuse In Illinois the Elder Abuse and Neglect Program is based on an advocacy model and is a victim guided process that respects a victims right to self-determination AgeOptions monitors the local agencies annually to ensure compliance with the Illinois Department on Aging policies and procedures AgeOptions provides technical assistance to elder abuse supervisors and case workers, and conducts regular outreach to professionals and the public on issues related to elder abuse, neglect and exploitation In state fiscal year 2010, there were 1,629 cases in suburban Cook County alone It is estimated that for every report of elder abuse there are ten more that go unreported Financial exploitation is the most reported form of abuse and accounts for over 50% of all cases

4c

(Code) (Expenses \$ 567,554 including grants of \$) (Revenue \$)

AgeOptions, the Area Agency on Aging of suburban Cook County, administers the Title V Senior Community Service Employment Program (SCSEP) SCSEP helps people who are age 55 or older with limited financial resources by providing on-the-job training assignments AgeOptions has a grant from the Illinois Department on Aging to fund training assignments at local community service agencies for up to 20 hours per week at a rate of pay of \$8 25 per hour All of our participants are looking for more permanent employment using the skills they learned in the program Host agencies can develop and train individuals in a variety of areas including clerical, food service, and maintenance and custodial In FY2010 Title V participants completed 63,288 hours of paid training at community organizations, 83% of SCSEP participants have family income at or below the federal poverty guideline and 73% of SCSEP participants were female

4d

Other program services (Describe in Schedule O) See also Additional Data for Description

(Expenses \$ 4,644,325 including grants of \$ 4,010,508) (Revenue \$)

4e

Total program service expenses \$ 14,471,045

Form 990 (2009)

Part IV Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A 	1	Yes
2	Is the organization required to complete Schedule B, Schedule of Contributors? 	2	Yes
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I 	3	No
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II 	4	Yes
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III	5	
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I 	6	No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II 	7	No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III 	8	No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV 	9	No
10	Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V 	10	No
11	Is the organization's answer to any of the following questions "Yes"? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable. 	11	Yes
	◆ Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.		
	◆ Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.		
	◆ Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.		
	◆ Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.		
	◆ Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.		
	◆ Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If "Yes," complete Schedule D, Part X.		
12	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII 	12	Yes
12A	Was the organization included in consolidated, independent audited financial statements for the tax year?	Yes	No
	If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional 	12A	No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a	No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Part I	14b	No
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U S? If "Yes," complete Schedule F, Part II	15	No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U S? If "Yes," complete Schedule F, Part III	16	No
17	Did the organization report a total of more than \$15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17	No
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	Yes
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No
20	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20	No

Part IV

Checklist of Required Schedules (continued)

21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21	Yes	
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22		No
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b–24d and complete Schedule K. If "No," go to line 25</i>	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27		No
28	Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or owner? <i>If "Yes," complete Schedule L, Part IV</i>	28c	Yes	
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33		No
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	34		No
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35		No
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O	38	Yes	

Part V

Statements Regarding Other IRS Filings and Tax Compliance

			Yes	No
1a	Enter the number reported in Box 3 of Form 1096, <i>Annual Summary and Transmittal of U.S. Information Returns</i> . Enter -0- if not applicable	1a3		
	b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c	Yes
2a	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return	2a133		
	b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions)			
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		3a	No
b If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O			3b	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		4a	No
	b If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		5a	No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		5b	No
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?			5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		6a	No
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			6b	
7 Organizations that may receive deductible contributions under section 170(c).				
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		7a	Yes
b If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b	Yes
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c	No
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d0		
e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			7e	No
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			7f	No
g For all contributions of qualified intellectual property, did the organization file Form 8899 as required?			7g	
h For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?			7h	
8 Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?			8	
9 Sponsoring organizations maintaining donor advised funds.				
a Did the organization make any taxable distributions under section 4966?			9a	
b Did the organization make a distribution to a donor, donor advisor, or related person?			9b	
10 Section 501(c)(7) organizations. Enter				
a Initiation fees and capital contributions included on Part VIII, line 12		10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		10b		
11 Section 501(c)(12) organizations. Enter				
a Gross income from members or shareholders		11a		
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)		11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?			12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year		12b		

Part VI

Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

			Yes	No
1a	Enter the number of voting members of the governing body	1a	19	
b	Enter the number of voting members that are independent	1b	19	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3		No
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4		No
5	Did the organization become aware during the year of a material diversion of the organization's assets?	5		No
6	Does the organization have members or stockholders?	6		No
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a		No
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following			
a	The governing body?	8a	Yes	
b	Each committee with authority to act on behalf of the governing body?	8b	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		No

Section B. Policies

(This Section B requests information about policies not required by the Internal Revenue Code.)

			Yes	No
10a	Does the organization have local chapters, branches, or affiliates?	10a		No
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	10b		
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11	Yes	
11A	Describe in Schedule O the process, if any, used by the organization to review the Form 990			
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	Yes	
13	Does the organization have a written whistleblower policy?	13	Yes	
14	Does the organization have a written document retention and destruction policy?	14	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	If "Yes" to line a or b, describe the process in Schedule O (See instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17	List the States with which a copy of this Form 990 is required to be filed IL
18	Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you make these available. Check all that apply. ☐ Own website ☐ Another's website ☒ Upon request
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization. DIANE SLEZAK 1048 LAKE ST SUITE 300 OAK PARK, IL 603011055 (708) 383-0258

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

• List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

☐ Check this box if the organization did not compensate any current or former officer, director, trustee or key employee

Form **990** (2009)

1b	Total	385,876	0	0
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2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **▶** **3**

		Yes	No
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	Yes	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		No

Section B. Independent Contractors

1	Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization		
	(A) Name and business address	(B) Description of services	(C) Compensation
2	Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ▶ 0		

Part VIII

Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns . . .	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c	12,246			
	d	Related organizations	1d				
	e	Government grants (contributions)	1e	14,888,176			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	796,840			
	g	Noncash contributions included in lines 1a-1f \$ _____					
	h	Total. Add lines 1a-1f		15,697,262			
Program Service Revenue	2a		Business Code				
	b						
	c						
	d						
	e						
	f	All other program service revenue					
	g	Total. Add lines 2a-2f					
	Other Revenue	3	Investment income (including dividends, interest and other similar amounts)		7,261		
4		Income from investment of tax-exempt bond proceeds . .					
5		Royalties					
6a		Gross Rents	(i) Real	(ii) Personal			
b		Less rental expenses					
c		Rental income or (loss)					
d		Net rental income or (loss)					
7a		Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
b		Less cost or other basis and sales expenses					
c		Gain or (loss)					
d		Net gain or (loss)			-6,448		-6,448
8a		Gross income from fundraising events (not including \$ 12,246 of contributions reported on line 1c) See Part IV, line 18	a	77,904			
b		Less direct expenses	b	35,482			
c		Net income or (loss) from fundraising events . .		42,422			42,422
9a		Gross income from gaming activities See Part IV, line 19	a				
b		Less direct expenses	b				
c		Net income or (loss) from gaming activities . .					
10a		Gross sales of inventory, less returns and allowances	a				
b	Less cost of goods sold	b					
c	Net income or (loss) from sales of inventory . .						
Miscellaneous Revenue		Business Code					
11a	OTHER INCOME		900,099	12,210			12,210
b							
c							
d	All other revenue						
e	Total. Add lines 11a-11d			12,210			
12	Total revenue. See Instructions			15,752,707	0	0	55,445

Part IX

Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	12,920,609	12,920,609		
2	Grants and other assistance to individuals in the U S See Part IV, line 22				
3	Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	354,011	16,326	337,685	
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	1,943,401	1,098,708	844,693	
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	96,498	33,517	62,981	
9	Other employee benefits	140,817	35,546	105,271	
10	Payroll taxes	165,876	82,297	83,579	
11	Fees for services (non-employees)				
a	Management				
b	Legal				
c	Accounting	27,950	10,988	16,962	
d	Lobbying	611		611	
e	Professional fundraising See Part IV, line 17				
f	Investment management fees				
g	Other	82,737	52,290	30,447	
12	Advertising and promotion	43,276	20,425	22,851	
13	Office expenses	36,277	11,760	24,517	
14	Information technology	44,766	9,430	35,336	
15	Royalties				
16	Occupancy	246,248	104,232	142,016	
17	Travel	30,705	9,852	20,853	
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	17,703	4,048	13,655	
20	Interest				
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	37,010		37,010	
23	Insurance	12,122	3,767	8,355	
24	Other expenses Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a	MISCELLANEOUS	40,953	10,487	30,466	
b	APPEAL SERVICES	28,046	28,046		
c	Accrued Vacation Expens	17,558		17,558	
d	EVALUATION	14,477	14,477		
e	EVENTS	11,015		11,015	
f	All other expenses	6,654	4,240	2,414	
25	Total functional expenses. Add lines 1 through 24f	16,319,320	14,471,045	1,848,275	0
26	Joint costs. Check here ☐ if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X

Balance Sheet

					(A)		(B)
					Beginning of year		End of year
Assets	1	Cash—non-interest-bearing			400	1	400
	2	Savings and temporary cash investments			2,356,111	2	1,971,631
	3	Pledges and grants receivable, net			1,323,644	3	1,776,993
	4	Accounts receivable, net			245,167	4	257,748
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L				5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L				6	
	7	Notes and loans receivable, net				7	
	8	Inventories for sale or use				8	
	9	Prepaid expenses and deferred charges			65,596	9	69,389
	10a	Land, buildings, and equipment, cost or other basis. Complete Part VI of Schedule D	10a	450,740			
	b	Less accumulated depreciation	10b	375,654	75,042	10c	75,086
	11	Investments—publicly traded securities				11	
	12	Investments—other securities. See Part IV, line 11			335,889	12	361,772
	13	Investments—program-related. See Part IV, line 11				13	
	14	Intangible assets				14	
	15	Other assets. See Part IV, line 11				15	
	16	Total assets. Add lines 1 through 15 (must equal line 34)			4,401,849	16	4,513,019
Liabilities	17	Accounts payable and accrued expenses			1,211,133	17	2,252,209
	18	Grants payable				18	
	19	Deferred revenue				19	
	20	Tax-exempt bond liabilities				20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D				21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L				22	
	23	Secured mortgages and notes payable to unrelated third parties				23	
	24	Unsecured notes and loans payable to unrelated third parties				24	
	25	Other liabilities. Complete Part X of Schedule D			785,729	25	393,545
	26	Total liabilities. Add lines 17 through 25			1,996,862	26	2,645,754
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29, and lines 33 and 34.						
	27	Unrestricted net assets			1,463,767	27	1,430,615
	28	Temporarily restricted net assets			941,220	28	436,650
	29	Permanently restricted net assets				29	
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.						
	30	Capital stock or trust principal, or current funds				30	
	31	Paid-in or capital surplus, or land, building or equipment fund				31	
	32	Retained earnings, endowment, accumulated income, or other funds				32	
	33	Total net assets or fund balances			2,404,987	33	1,867,265
	34	Total liabilities and net assets/fund balances			4,401,849	34	4,513,019

Part XI Financial Statements and Reporting

	Yes	No
1 Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? . . .		No
b Were the organization's financial statements audited by an independent accountant?	Yes	
c If "Yes," to 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	Yes	
d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separated basis		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	Yes	
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits . . .	Yes	

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization AGEOPTIONS INC	Employer identification number 36-2806193
--	--

Part I

Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

1

☐

A church, convention of churches, or association of churches **section 170(b)(1)(A)(i).**

2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)

3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state

5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II)

8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)

9

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)

10

☐

An organization organized and operated exclusively to test for public safety See**section 509(a)(4).**

11

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h

a

☐

Type I

b

☐

Type II

c

☐

Type III - Functionally integrated

d

☐

Type III - Other

e

☐

By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f

☐

If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box

g

☐

Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i)

a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?

(ii)

a family member of a person described in (i) above?

(iii)

a 35% controlled entity of a person described in (i) or (ii) above?

h

☐

Provide the following information about the supported organization(s)

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support?
			Yes	No	Yes	No	Yes	No	
Total									

Part II

Support Schedule for Organizations Described in IRC 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	14,960,082	16,355,054	15,554,335	15,688,994	15,697,262	78,255,727
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	14,960,082	16,355,054	15,554,335	15,688,994	15,697,262	78,255,727
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public Support. Subtract line 5 from line 4						78,255,727

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	14,960,082	79,451	15,554,335	15,688,994	15,697,262	78,255,727
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	64,705	79,451	43,631	14,463	7,261	209,511
9 Net income from unrelated business activities, whether or not the business is regularly carried on	38,457	60,383		20,623	42,422	161,885
10 Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets	1,310	1,192	3,694	1,100	12,210	19,506
11 Total support (Add lines 7 through 10)						78,646,629
12 Gross receipts from related activities, etc (See instructions)					12	15,250
13 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage

14	Public Support Percentage for 2009 (line 6 column (f) divided by line 11 column (f))	14	99 500 %
15	Public Support Percentage for 2008 Schedule A, Part II, line 14	15	99 470 %
16a	33 1/3% support test—2009. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		
b	33 1/3% support test—2008. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		
17a	10%-facts-and-circumstances test—2009. If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization		
b	10%-facts-and-circumstances test—2008. If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization		
18	Private Foundation If the organization did not check a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions		

Part IIISupport Schedule for Organizations Described in IRC 509(a)(2)
(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3Gross receipts from activities that are not an unrelated trade or business under section 513						
4Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5The value of services or facilities furnished by a governmental unit to the organization without charge						
6Total. Add lines 1 through 5						
7aAmounts included on lines 1, 2, and 3 received from disqualified persons						
bAmounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
cAdd lines 7a and 7b						
8Public Support (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9Amounts from line 6						
10aGross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
bUnrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
cAdd lines 10a and 10b						
11Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13Total support (Add lines 9, 10c, 11 and 12.)						
14First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage

15Public Support Percentage for 2009 (line 8 column (f) divided by line 13 column (f))	15	
16Public support percentage from 2008 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17Investment income percentage for 2009 (line 10c column (f) divided by line 13 column (f))	17	
18Investment income percentage from 2008 Schedule A, Part III, line 17	18	
19a33 1/3% support tests—2009. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization		
b33 1/3% support tests—2008. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization		
20Private Foundation If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions		

Part IV

Supplemental Information. Supplemental Information. Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. See instructions

SCHEDULE C

(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ **Complete if the organization is described below.**
▶ **Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.**

OMB No 1545-0047

2009

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Inspection

If the organization answered “Yes,” to Form 990, Part IV, Line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered “Yes,” to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered “Yes,” to Form 990, Part IV, Line 5 (Proxy Tax) or Form 990-EZ, line 35a (regarding proxy tax), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of the organization AGEOPTIONS INC	Employer identification number 36-2806193
--	--

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV
- 2 Political expenditures ▶ \$
- 3 Volunteer hours

Part I-B Complete if the organization is exempt under section 501(c)(3).

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No
- 4a Was a correction made? ☐ Yes ☐ No
- b If "Yes," describe in Part IV

Part I-C Complete if the organization is exempt under section 501(c) except section 501(c)(3).

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt funtion activities ▶ \$
- 3 Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b ▶ \$
- 4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No
- 5 State the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-

Part II-A

Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

A

Check

☐

if the filing organization belongs to an affiliated group

B

Check

☐

if the filing organization checked box A and "limited control" provisions apply

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing Organization's Totals	(b) Affiliated Group Totals												
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)															
b Total lobbying expenditures to influence a legislative body (direct lobbying)															
c Total lobbying expenditures (add lines 1a and 1b)															
d Other exempt purpose expenditures															
e Total exempt purpose expenditures (add lines 1c and 1d)															
f Lobbying nontaxable amount Enter the amount from the following table in both columns															
<table><tr><td>If the amount on line 1e, column (a) or (b) is:</td><td>The lobbying nontaxable amount is:</td></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000</td></tr></table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
g Grassroots nontaxable amount (enter 25% of line 1f)															
h Subtract line 1g from line 1a If zero or less, enter -0-															
i Subtract line 1f from line 1c If zero or less, enter -0-															
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		☐ Yes	☐ No												

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) Total
2a Lobbying non-taxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots non-taxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B

Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

		(a)		(b)
		Yes	No	Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
	a Volunteers?		No	
	b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	Yes		
	c Media advertisements?		No	
	d Mailings to members, legislators, or the public?		No	
	e Publications, or published or broadcast statements?		No	
	f Grants to other organizations for lobbying purposes?		No	
	g Direct contact with legislators, their staffs, government officials, or a legislative body?	Yes		
	h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		No	
	i Other activities? If "Yes," describe in Part IV		No	
j Total lines 1c through 1i			611	
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		No	
b	If "Yes," enter the amount of any tax incurred under section 4912			
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

		Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1	
2	Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3	Did the organization agree to carryover lobbying and political expenditures from the prior year?	3	

Part III-B

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Part III-A, line 3 is answered "Yes".

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).	2a	
a	Current year		
b	Carryover from last year		
c	Total		
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5	Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV

Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i. Also, complete this part for any additional information.

Identifier	Return Reference	Explanation
Part II-B, Line 1i	Explanation of Other Lobbying Activities	Lobbying activities include meeting with legislators concerning issues that affect funding and advocacy for older Americans at the State and Federal levels

SCHEDULE D
(Form 990)

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization AGEOPTIONS INC	Employer identification number 36-2806193
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Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	
2	Aggregate contributions to (during year)	
3	Aggregate grants from (during year)	
4	Aggregate value at end of year	
5	Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? YesNo	
6	Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit YesNo	

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1

Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or pleasure)

☐ Preservation of an historically importantly land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

2

Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a	Total number of conservation easements
b	Total acreage restricted by conservation easements
c	Number of conservation easements on a certified historic structure included in (a)
d	Number of conservation easements included in (c) acquired after 8/17/06

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶

4

Number of states where property subject to conservation easement is located ▶

5

Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

YesNo

6

Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ▶

7

Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$

8

Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)?

YesNo

9

In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization’s financial statements that describes the organization’s accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a

If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b

If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1▶ \$

(ii) Assets included in Form 990, Part X▶ \$

2

If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a

Revenues included in Form 990, Part VIII, line 1▶ \$

b

Assets included in Form 990, Part X▶ \$

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐ Public exhibition

b

☐ Scholarly research

c

☐ Preservation for future generations

d

☐ Loan or exchange programs

e

☐ Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV

Part V

Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a)Current Year	(b)Prior Year	(c)Two Years Back	(d)Three Years Back	(e)Four Years Back
1a	Beginning of year balance				
b	Contributions				
c	Investment earnings or losses				
d	Grants or scholarships				
e	Other expenditures for facilities and programs				
f	Administrative expenses				
g	End of year balance				

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶

b

Permanent endowment ▶

c

Term endowment ▶

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i)

unrelated organizations

(ii)

related organizations

b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

	Yes	No
3a(i)		
3a(ii)		
3b		

4

Describe in Part XIV the intended uses of the organization's endowment funds

Part VI

Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b)Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment		450,740	375,654	75,086
e Other				
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				75,086

Part XI

Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	15,752,707
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	16,319,320
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	-566,613
4	Net unrealized gains (losses) on investments	4	28,891
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net) Add lines 4 - 8	9	28,891
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	-537,722

Part XII

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	15,825,240
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	28,891
b	Donated services and use of facilities	2b	8,160
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	35,482
e	Add lines 2a through 2d	2e	72,533
3	Subtract line 2e from line 1	3	15,752,707
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	15,752,707

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	16,362,962
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	8,160
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	35,482
e	Add lines 2a through 2d	2e	43,642
3	Subtract line 2e from line 1	3	16,319,320
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	16,319,320

Part XIV

Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Identifier	Return Reference	Explanation
Part X	Description of Uncertain Tax Positions Under FIN 48	The Agency follows the authoritative guidance issued by the Financial Accounting Standards Board (FASB) that clarifies the accounting for uncertainty in income taxes recognized in an entity's financial statements and prescribes a recognition threshold of more-likely-than-not to be sustained upon examination. Measurement of the tax uncertainty occurs if the recognition threshold has been met. This guidance also addresses derecognition, classification, interest and penalties, disclosure, and transition. The Agency conducts business solely in the U.S. and, as a result, files informational tax returns for U.S. and Illinois. In the normal course of business, the Agency is subject to examination by taxing authorities. The Agency's tax returns for years subsequent to fiscal year 2006 are open, by statute, for review by authorities. However, at present, there are no ongoing income tax audits or unresolved disputes with the various tax authorities that the Agency currently files or has filed with.
Part XII, Line 2d - Other Adjustments		DIRECT EXPENSES RELATED TO special event 35482
Part XIII, Line 2d - Other Adjustments		DIRECT EXPENSES RELATED TO SPECIAL EVENT 35482

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding
Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19,
or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

2009

Open to Public Inspection

Name of the organization
AGEOPTIONS INC

Employer identification number
36-2806193

Part I Fundraising Activities. Complete if the organization answered "Yes" to Form 990, Part IV, line 17.
Form 990-EZ filers are not required to complete this part.

- 1

Indicate whether the organization raised funds through any of the following activities. Check all that apply.

a

☐ Mail solicitations

e

☐ Solicitation of non-government grants

b

☐ Internet and e-mail solicitations

f

☐ Solicitation of government grants

c

☐ Phone solicitations

g

☐ Special fundraising events

d

☐ In-person solicitations
- 2a

Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising activities?

☐ Yes

☐ No
- b

If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990-EZ filers are not required to complete this table.

(i) Name of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
Total ▶						

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing

Part II Fundraising Events.

Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

Revenue			(a) Event #1	(b) Event #2	(c) Other Events	(d) Total Events
			CELEBRATING AGING	ANNUAL LUNCHEON	1	(Add col (a) through col (c))
			(event type)	(event type)	(total number)	
1	Gross receipts		83,534	5,550	1,066	90,150
2	Less Charitable contributions		5,630	5,550	1,066	12,246
3	Gross income (line 1 minus line 2)		77,904			77,904
Direct Expenses	4	Cash prizes				
	5	Non-cash prizes				
	6	Rent/facility costs		18,250		18,250
	7	Food and beverages				
	8	Entertainment				
	9	Other direct expenses		17,232		17,232
	10	Direct expense summary Add lines 4 through 9 in column (d) ▶				35,482
	11	Net income summary Combine lines 3, column d, and line 10. ▶				42,422

Part III Gaming.

Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

Revenue			(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming
						(Add col (a) through col (c))
1	Gross revenue					
Direct Expenses	2	Cash prizes				
	3	Non-cash prizes				
	4	Rent/facility costs				
	5	Other direct expenses				
	6	Volunteer labor		☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	
	7	Direct expense summary Add lines 2 through 5 in column (d) ▶				
	8	Net gaming income summary Combine lines 1, column d, and line 7 ▶				

			Yes	No
9	Enter the state(s) in which the organization operates gaming activities _____			
a	Is the organization licensed to operate gaming activities in each of these states?	9a		
b	If "No," Explain _____ _____			
10a	Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?	10a		
b	If "Yes," Explain _____ _____			
11	Does the organization operate gaming activities with nonmembers?	11		
12	Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?	12		

		Yes	No
13	Indicate the percentage of gaming activity operated in		
a	The organization's facility 13a		
b	An outside facility 13b		
14	Enter the name and address of the person who prepares the organization's gaming/special events books and records		
Name ►			
Address ►			
15a	Does the organization have a contract with a third party from whom the organization receives gaming revenue?	15a	
b	If "Yes," enter the amount of gaming revenue received by the organization ► \$ _____ and the amount of gaming revenue retained by the third party ► \$ _____		
c	If "Yes," enter name and address		
Name ►			
Address ►			
16	Gaming manager information		
Name ►			
Gaming manager compensation ► \$ _____			
Description of services provided ►			
☐ Director/officer ☐ Employee ☐ Independent contractor			
17	Mandatory distributions		
a	Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?	17a	
b	Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$		

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
AGEOPTIONS INC

Grants and Other Assistance to Organizations,
Governments and Individuals in the United States

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990

OMB No 1545-0047

2009

Open to Public
Inspection

Employer identification number
36-2806193

Part I

General Information on Grants and Assistance

- 1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No
- 2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II

Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed ▶ ☐

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							

2

Enter total number of section 501(c)(3) and government organizations

63

3

Enter total number of other organizations

0

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2009

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

Name of the organization AGEOPTIONS INC	Employer identification number 36-2806193
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Part I

Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items		
☐ First-class or charter travel		
☐ Travel for companions		
☐ Tax idemnification and gross-up payments		
☐ Discretionary spending account		
☐ Housing allowance or residence for personal use		
☐ Payments for business use of personal residence		
☐ Health or social club dues or initiation fees		
☐ Personal services (e g , maid, chauffeur, chef)		
b If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain	1b	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	2	
3 Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply		
☐ Compensation committee		
☐ Independent compensation consultant		
☐ Form 990 of other organizations		
☐ Written employment contract		
☐ Compensation survey or study		
☒ Approval by the board or compensation committee		
4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization		
a Receive a severance payment or change-of-control payment?	4a	No
b Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b	No
c Participate in, or receive payment from, an equity-based compensation arrangement?	4c	No
If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III		
Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.		
5 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of		
a The organization?	5a	No
b Any related organization?	5b	No
If "Yes," to line 5a or 5b, describe in Part III		
6 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of		
a The organization?	6a	No
b Any related organization?	6b	No
If "Yes," to line 6a or 6b, describe in Part III		
7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	7	No
8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III	8	No
9 If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	9	

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

[illegible]

Part III

Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
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Schedule L
(Form 990 or 990-EZ)

Transactions with Interested Persons
▶ Complete if the organization answered
"Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c,
or Form 990-EZ, Part V lines 38a or 40b.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047
2009
Open to Public Inspection

Name of the organization
AGEOPTIONS INC

Employer identification number

36-2806193

Part I Excess Benefit Transactions (section 501(c)(3) and section 501 (c)(4) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c)Original principal amount	(d)Balance due	(e) In default?		(f) Approved by board or committee?		(g)Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
Total ▶ \$										

Part III Grants or Assistance Benefitting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b)Relationship between interested person and the organization	(c)Amount of grant or type of assistance

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
SOLUTIONS FOR CARE - SERVICE PROVIDER	SERVICE PROVIDER BOARD MEMBER IS A RELATIVE OF THE AGENCY'S VICE PRESIDENT	467,456	GRANTS FOR SERVICES PROVIDED TO SENIORS		No

Additional Data

Software ID:
Software Version:
EIN: 36-2806193
Name: AGEOPTIONS INC

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SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990
Complete to provide information for responses to specific questions on Form 990 or to provide any additional information.
► Attach to Form 990.

OMB No 1545-0047
2009
Open to Public Inspection

Name of the organization AGEOPTIONS INC	Employer identification number 36-2806193
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Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 11		The chief executive shall ensure that tax payments and other government-ordered payments or filings are filed in a timely and accurate manner. The chief executive shall sign and certify that IRS Form 990 is accurate and complete. The audit/finance committee shall review and approve IRS Form 990 annual tax filing prior to submission, and the full board shall receive a copy of IRS Form 990 within 30 days prior to its submission.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 12c		Annually, prior to the October Board Meeting the "Board of directors/Advisory Council Disclosure Statement" is mailed to all members. The completed form is required to be submitted prior to or at that meeting. The completed, returned, signed statements are reviewed for any conflicts. If any they are resolved. Additionally, as each new member is added to the Board this statement is completed prior to the Board approval of the new member.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 15		The Board has the authority to hire, employ and compensate the Chief Executive Officer who will carry out the responsibilities as outlined in the By-laws (see section 3.5 below). The Board retains the authority to establish compensation guidelines for annual salary and compensation reviews. The Finance Committee will review and approve the agency budget including the identification of resources for compensation of employees. The Executive Committee will review and approve compensation for the chief executive officer and key employees annually. It will be a goal to conduct comprehensive compensation reviews and review the compensation philosophy at a minimum of every five years and more frequently, as the Board desires. Excerpt from AgeOptions By-Laws Section 3.5 President: The President shall be the Chief Executive Officer of the Corporation hired by the Board and shall have responsibility for the general and active management of the affairs, activities and daily business of the Corporation, subject to all policies and procedures adopted by the Board. Subject to the direction and control of the Board, he/she shall be in charge of ensuring that the resolutions and directives of the Board are carried out, except in those instances in which the Board or these By-laws assign that responsibility to some other person. Except in those instances in which the Board expressly delegates the exclusive authority to execute to another officer or agent of the Corporation, the President, with authority from the Board or Executive Committee, shall sign for the Corporation any agreements, applications, contracts, deeds, mortgages, bonds or other instruments and grant awards, obligating the corporation's action or funds. In addition to the authority conferred on the president in these Bylaws, the Board may authorize any other officer or officers, agent or agents, including but not limited to the President, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to specific instances. The President Shall employ and direct all personnel necessary for the conduct and work of the Corporation and shall perform such other duties as may be assigned by the Board. The president or his/her designee shall attend-all meetings of the Board and of the Executive Committee.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 19		THE GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND THE FINANCIAL STATEMENTS ARE MADE AVAILABLE TO THE PUBLIC UPON REQUEST.

Additional Data

Software ID:
Software Version:
EIN: 36-2806193
Name: AGEOPTIONS INC

Form 990, Part III - 4 Program Service Accomplishments (See the Instructions)

4d. Other program services				
(Code	) (Expenses \$	4,644,325	including grants of \$	4,010,508) (Revenue \$
State/GRF - General revenue funds for the purpose of abuse intervention, transportation, out-reach and home delivered MEALS				

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)							(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former				
BLAHA ARLENE DIRECTOR	2 00	X						0	0	0	
BOUSKY TRACY CHAIRPERSON	2 00	X						0	0	0	
BROOKS ROBERT DIRECTOR	2 00	X						0	0	0	
COONDA MARY E DIRECTOR	2 00	X						0	0	0	
DRINAN DONNA DIRECTOR	2 00	X						0	0	0	
GAGLIARDO JOSEPH DIRECTOR	2 00	X						0	0	0	
GLEASON CATHY DIRECTOR	2 00	X						0	0	0	
GORDON MURRAY DIRECTOR	2 00	X						0	0	0	
HOWE-HRACH KATHLEEN DIRECTOR	2 00	X						0	0	0	
JORDAN LEWIS A DIRECTOR	2 00	X						0	0	0	
KARUTZ FREDERICK DIRECTOR	2 00	X						0	0	0	
KOTEL MICHAEL DIRECTOR	2 00	X						0	0	0	
MILLAN CARMENZA DIRECTOR	2 00	X						0	0	0	
MOORE DONNA DIRECTOR	2 00	X						0	0	0	
PEACHEY KIRSTEN DIRECTOR	2 00	X						0	0	0	
PERRY ANTHONY DIRECTOR	2 00	X						0	0	0	
ROZYCKI CARLA DIRECTOR	2 00	X						0	0	0	
SIEGEL LINDA DIRECTOR	2 00	X						0	0	0	
WELLS ELIZABETH DIRECTOR	2 00	X						0	0	0	
LAVIN JONATHAN PRESIDENT & CHIEF EXEC	35 00			X				150,024	0	0	
SLEZAK DIANE VICE PRES & CHIEF OPER	35 00			X				127,611	0	0	
MATSON BRUCE TREASURER & CHIEF FINANCIAL	35 00			X				108,241	0	0	

Form 990, Part IX - Statement of Functional Expenses - 24a - 24e Other Expenses

<i>Do not include amounts reported on line 6b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
MISCELLANEOUS	40,953	10,487	30,466	
APPEAL SERVICES	28,046	28,046		
Accrued Vacation Expens	17,558		17,558	
EVALUATION	14,477	14,477		
EVENTS	11,015		11,015	

Software ID:

Software Version:

EIN: 36-2806193

Name: AGEOPTIONS INC

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
AAA of Southwestern Illinois 2365 COUNTRY ROAD BELLEVILLE,IL 62221	37-0986597	501c3	6,656				Activities related to healthcare fraud prevention and census outreach
Aging Care Connections111 WEST HARIS AVE LA GRANGE,IL 60526	36-2721289	501c3	639,567				Social, Nutrition, Health Assistance and Promotion, Elder Abuse Intervention, Caregiver Services for the Elderly, access to public support programs for elderly and people with disabilities, and assistance for filling out pharmaceutical assistance programs
Arab American Family Services9044 S Octavia BURBANK,IL 60455	60-0002593	501c3	53,227				Nutrition and Social services for minority elderly and help seniors enroll in benefits assistance programs
BETHEL AFRICAN METHODIST3355 West 139th St ROBBINS,IL 60472	36-1495255	501c3	8,000				Support services for unpaid caregivers of older adults
Bloom Township Senior Citizens Service425 S HALSTED STREET CHICAGO HEIGHTS,IL 60411	36-6009584	501C1	65,650				Social services for the elderly, Medicare education, outreach, and policy development, and assistance for accessing pharmaceutical benefits programs
Calumet Township12633 S ASHLAND CALUMET PARK,IL 60827	36-6006229	501C1	65,947				Nutrition services for elderly
Catholic Charities - North 671 S LEWIS AVENUE WAUKEGAN,IL 60085	36-2170821	501c3	52,467				Nutrition services for elderly
Catholic Charities - South Suburban Senior Services 15300 SOUTH LEXINGTON HARVEY,IL 60426	36-2170821	501c3	1,399,719				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs
CATHOLIC CHARITIES-NW 1801 W CENTRAL RD ARLINGTON HEIGHTS,IL 60005	36-2170821	501c3	652,479				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs, and activities related to healthcare fraud prevention and census outreach
CATHOLIC CHARITIES - LUNCH AND MORE1801 W CENTRAL RD ARLINGTON HEIGHTS,IL 60005	36-2170821	501c3	480,396				Nutrition services for elderly

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CEDA OF COOK COUNTY INC208 S LASALLE ST SUITE 1900 CHICAGO,IL 60604	36-2597741	501c3	41,135				Social services for the elderly and provide Medicare education, outreach, and policy development
CHGO DEPT OF FAMILY & SUPPORT 30 N LASALLE SUITE 2320 CHICAGO,IL 60602	36-6005820	501c1	10,746				Activities related to healthcare fraud prevention
Community Nutrition Network 208 SOUTH LASALLE STREET SUITE 1900 1900 CHICAGO,IL 60604	36-4394010	501c3	1,966,036				Nutrition services for elderly
Council for Jewish Elderly 3003 W TOUHY AVENUE CHICAGO,IL 60645	36-2727597	501c3	442,714				Social and nutrtnion services for the elderly, and help seniors enroll in benefits assistance programs
COVENANT UNITED 1130 EAST 154TH STREET SOUTH HOLLAND,IL 60473	36-4197953	501c3	7,657				Support services for unpaid caregivers of older adults
EAST CENTRAL IL AAA 1003 MAPLE HILL ROAD BLOOMINGTON,IL 61704	37-0982325	501c3	6,056				Activities related to healthcare fraud prevention and census outreach
Evanston Commission on Aging 2100 RIDGE AVENUE EVANSTON,IL 60201	36-6005870	501c1	41,640				Ombudsman services for the elderly, and help seniors enroll in benefits assistance programs
FORD HEIGHTS COMMUNITY SERVICE 943 E LINCOLN HIGHWAY FORD HEIGHTS,IL 60411	36-2658308	501c3	51,462				Nutrition services for elderly
DESPLAINES COMMUNITY SENIOR CENTER 15001 PAULINA AVENUE HARVEY,IL 60426	36-2884456	501C3	58,395				Nutrition services for elderly
Hanover Township 240 SOUTH ILLINOIS ROUTE 59 BARTLETT,IL 60103	36-2750477	501c3	79,580				Social services for elderly

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Hanul Family Alliance1166 S ELMHURST ROAD MOUNT PROSPECT, IL 60056	36-3519498	501c3	136,007				Social services for minority elderly
Illinois Welcoming Center 1708 MAIN STREET MELROSE PARK, IL 60160	36-4163567	501c3	5,500				Help seniors enroll in benefits assistance programs
Interfaith Housing Center of the Northern Suburbs614 LINCOLN AVE WINNETKA, IL 60093	36-2934709	501c3	33,107				Social Services for the elderly
Kenneth W Young Centers 1001 ROHLWING RD ELK GROVE VILLAGE, IL 60007	23-7181444	501c3	473,279				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs
KIZER MEMORIAL COGIC 15001 PAULINA AVENUE HARVEY, IL 60426	36-3812587	501c3	8,000				Support services for unpaid caregivers of older adults
Legal Assistance Foundation of Chicago111 E JACKSON 3RD FL CHICAGO, IL 60604	36-2754650	501c3	713,384				Ombudsman, Legal Assistance for Elderly, and Legal Assistance for Non-parent relatives raising children
Leyden Family Service Senior Citizens10001 W GRAND AVE FRANKLIN PARK, IL 60131	36-2235147	501c3	93,951				Social Services for the elderly, and assistance for accessing pharmaceutical benefits programs
Metro Family Services - EvanstonSkokie1 NORTH DEARBORN 10TH FLOOR CHICAGO, IL 60602	36-2167940	501c3	155,548				Elder Abuse Intervention services
Metropolitan Asian Family Services7541 N WESTERN CHICAGO, IL 60645	36-3925432	501c3	171,352				Social services for minority elderly
Metropolitan Family Services 13136 S WESTERN AVENUE BLUE ISLAND, IL 60406	36-2167940	501c3	12,000				Support services for unpaid caregivers of older adults

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North Shore Senior Center 161 NORTHFIELD RD NORTHFIELD,IL 60093	36-2366074	501c3	838,540				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs
Northwestern Illinois AAA 2576 CHARLES STREET ROCKFORD,IL 61108	36-2742719	501c3	5,000				Activities related to healthcare fraud prevention and census outreach
Oak Park Township 418 S OAK PARK AVE OAK PARK,IL 60302	36-6006388	501C1	463,886				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs
Palatine Township Senior Citizens Council 505 S QUENTIN RD PALATINE,IL 60067	36-2781764	501c3	225,308				Social and nutrition services for elderly, and assistance for accessing pharmaceutical benefits programs
Palos Area Transportation Services for the Elderly 10426 S ROBERTS RD PALOS HILLS,IL 60465	81-0556995	501C1	16,208				Respite assistance for caregivers
Plows Council on Aging 7808 W COLLEGE DRIVE SUITE 5E PALOS HEIGHTS,IL 60463	36-2882809	501c3	859,137				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs
Progress Center for Independent Living 7521 MADISON FOREST PARK,IL 60130	36-3595485	501c3	52,750				Provide access to public support programs for elderly and people with disabilities, and provide Medicare education, outreach, and policy development
SALVATION ARMY 4800 N MARINE DRIVE CHICAGO,IL 60640	36-2167909	501c3	88,367				Social services for the Elderly
Seniors Assistance Center 7774 WIRVING PARK ROAD NORRIDGE,IL 60706	36-2918912	501c3	230,781				Social and nutrition services for elderly, and assistance for accessing pharmaceutical benefits programs
SHEKINAH CHAPEL 13800 SOUTH WABASH RIVERDALE,IL 60827	51-0600195	501c3	7,920				Support services for unpaid caregivers of older adults

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Solutions for Care7222 WEST CERMAK ROAD 200 NORTH RIVERSIDE,IL 60546	23-7176798	501c3	469,259				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and provide Medicare education, outreach, and policy development, and assistance for accessing pharmaceutical benefits programs, and census outreach
ST CHARLES BORROMEO CHURCH1101 N 23RD AVENUE MELROSE PARK,IL 60160	36-2270057	501c3	69,306				Nutrition services for the minority elderly
Stickney Township Office on Aging5635 STATE ROAD BURBANK,IL 60459	36-6006465	501C1	373,762				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs
Thornton Township Senior Center333 EAST 162ND STREET SOUTH HOLLAND,IL 60473	36-6006473	501C1	24,157				Social services for elderly
University of Illinois Chicago - Dept of Pharm Practice833 S WOOD M/C 886 CHICAGO,IL 60612	37-6000511	501c3	38,710				Health Promotion services for elderly
URHAI Community Service Center2945 W PETERSON AVE S-204 CHICAGO,IL 60659	36-4427299	501c3	39,200				Social and nutrition services for minority elderly, and help seniors enroll in benefits assistance programs
VALLEY KINGDOM COMMUNITY DEV17100 S HALSTED STREET HARVEY,IL 60426	58-2596184	501c3	8,000				Support services for unpaid caregivers of older adults
VICTORY CHRISTIAN ASSEMBLY2901 WEST 159TH ST MARKHAM,IL 60426	36-3517963	501c3	7,438				Support services for unpaid caregivers of older adults
VILLAGE OF WHEELING2 COMMUNITY BLVD WHEELING,IL 60090	36-6006156	501C1	31,873				Nutrition services for the elderly
West Suburban Senior Services439 BOHLAND BELLWOOD,IL 60104	36-2759604	501c3	645,041				Social, Nutrition, Health Promotion, and Caregiver Services for the Elderly, and assistance for accessing pharmaceutical benefits programs

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White Crane Wellness Center 1355 W FOSTER CHICAGO, IL 60640	36-3719545	501c3	61,017				Health Promotion services for elderly
A-SENIOR CORPORATION 1550 E HIGGINS RD SUITE 119 ELK GROVE VILLAGE, IL 60007	36-4217123	501c3	8,693				Respite assistance to caregivers
ADDUS HEALTHCARE 1818 RIDGE ROAD HOMEWOOD, IL 60430	42-1014070	501c3	10,658				Respite assistance to caregivers
ADDUS HEALTHCARE 10330 W ROOSEVELT RD SUITE 206 WESTCHESTER, IL 60154	42-1014070	501c3	5,392				Respite assistance to caregivers
ARDEN COURTS HAZEL CREST 3701 WEST 183RD STREET HAZEL CREST, IL 60429	34-1903270	501c3	23,725				Respite assistance to caregivers
HELP AT HOME INC 1 NORTH STATE ST 1500 CHICAGO, IL 60602	36-2820808	501c3	5,465				Respite assistance to caregivers
HOME INSTEAD SENIOR CARE 475 W 55TH STREET SUITE 105 LAGRANGE, IL 60525	65-0971608	501c3	12,833				Respite assistance to caregivers
MA'DEAR HOME SERVICES INC 1525 E 53RD STREET CHICAGO, IL 60615	36-4212859	501c3	9,479				Respite assistance to caregivers
SHAY NURSING SERVICES INC 5730 W 159TH ST OAK FOREST, IL 60452	36-3333050	501c3	6,660				Respite assistance to caregivers
VISITING ANGELS - BROOKFIELD 9211 R OGDEN AVE BROOKFIELD, IL 60513	20-0135316	501c3	13,723				Respite assistance to caregivers

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WINDMILL NURSING PAVILION16000 S WABASH SOUTH HOLLAND, IL 60473	36-3485403	501c3	18,700				Respite assistance to caregivers
WORLD MADE FLESH WORSHIP CENTER3709 WEST 147TH PLACE MIDLOTHIAN, IL 60445	81-0577412	501c3	8,000				Respite assistance to caregivers
XILIN ASSOCIATION1163 E OGDEN AVE SUITE 300 NAPERVILLE, IL 60563	36-3890616	501c3	172,549				Social and nutrition services for minority elderly