

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



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.

Beginning of Current Year End of Year 8,099,759. 8,439,440. 20 Total assets (Part X, line 16) 6,356,552. 6,488,963. 21 Total liabilities (Part X, line 26) 6,356,552. 6,488,963. 22 Net assets or fund balances. Subtract line 21 from line 20 1,743,207. 1,950,477. Partitl Signature Block Under penalities 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 beclaration of preparer (utility man officer) is based on all information of which preparer has any knowledge. Signature of officer Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Firm's name Kundinger, Corder & Engle, P.C. Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) End of Year 8,099,759. 8,439,440. 6,356,552. 6,488,963. 1,743,207. 1,950,477. Partitl Signature of further and title penalities 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 beclaration of preparer (utility in the preparer true) of the penalities of perjury, I declare that I have examined this return of the penalities 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 beclaration of preparer (utility in the penalities 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 correct penalities of penalities	A	or the	e 2010 calendar year, or tax year beginning Ju	N 1, 2010 and	ending	MAY 31, 2011							
The product of this product of the	В	Check if applicabl	C Name of organization			D Employer iden	tification number						
Dong Business As Dong Busine	x]chang	e The Financial Planning Association	n									
Number and street (in Pr. U. study illiand is flot believed out is seen adules)			Doing Business As			84-1	.521488						
State Stat		Instial return	Number and street (or P.O. box if mail is not del	E Telephone num	nber								
City or town, state or country, and ZIP + 4 Provex_ Co. 80231			1		303-	759-4900							
Denver Co 80231 Final and address of principal officer.Marx vin Tuttle Final and address of principal officer. Final and address of principal officer. Final addre		Amen	City or town, state or country, and ZIP + 4		-	G Gross receipts \$	12,666,734.						
Final and address of principal officer. Marvin Tuttle and address of principal officer. Marvin Mar		Applic	.			H(a) Is this a grou	p return						
Same as C above Solicion S		pendi	F Name and address of principal officer:Marvi	n Tuttle		for affiliates?	Yes X No						
Website:						H(b) Are all affiliates	included? Yes No						
K Form of organization: X Corporation Trust Association Other L Vear of formation: 2000 M State of legal domicite: DC Continuous C	<u> </u>	Tax-ex	empt status: 501(c)(3) x 501(c) (6)		or 52	7 If "No," attact	h a list. (see instructions)						
K Form of organization: X Corporation Trust Association Other L Vear of formation: 2000 M State of legal domicite: DC Continuous C	J	Websi	te: www.fpanet.org			H(c) Group exemp	otion number > 3687						
Breifly describe the organization's mission or most significant activities: See Form 990, Part III, Line 1 2 Check this box ▶				sociation Other >	L Yea								
2 Check this box			Summary										
2 Check this box		1	Briefly describe the organization's mission or most	significant activities: See Fo	orm 990,	Part III, Line	1						
Solution	ğ	1											
Solution	r.	2	Check this box I if the organization discoil	ntinued its operations or dispo	osed of mo	re than 25% of its ne	t assets.						
Solution	Ş.	3	Number of voting members of the governing body	(Part VI, line 1a)			3 18						
Solution	Ğ					[4 18						
Solution	<u>~</u> 8					[5 78						
Solution	芸	6	Total number of volunteers (estimate if necessary)				6 325						
Solution	_ <u></u>		•	lumn (C), line 12		[-	7a 295,796.						
Prior Year Current Year 0	93 ~≺	1				[·	7b 51,683.						
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e						Prior Year	Current Year						
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e	₹.	8	Contributions and grants (Part VIII, line 1h)				0. 0.						
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e	چر			Program service revenue (Part VIII, line 2g)									
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e		10	•	258,36	2. 171,988.								
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e	Πœ			183,71	.4. 253,777.								
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e			•			12,802,47	5. 12,573,552.						
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e	ξ—	_					0. 0.						
15 Salanes, other competition, employee benefits (part X, folumn (A), lines 5-10) 16a Professional fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total fundrasing experies (Part X, column (A), line) to be total expenses. Subtract line to the fundrasing experies (Part X, line) to the fundrasing e						0. 0.							
16a Professional fundraising less (Part IX, column (A), line) 1.6 b Total fundraising expenses (Part IX, column (Q) [2] in a 25	-	1	Salaries other compensation employee benefits	\	5,228,33	37. 4,519,490.							
Total expenses. Add fines is Truchy solumn (A), line 25) 13 135, 434. 12, 738, 761. 19 Revenue less expenses. Subtract line 14 truch line 12 20 Total assets (Part X, line 16) 21 Total liabilities (Part X, line 26) 22 Net assets or fund balances. Subtract line 21 from line 20 23 Signature Block 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 penalties of perjury and title. Print/Type preparer's name Paid Preparer Signature of officer Print/Type preparer's name Steven R. Corder Firm's name Kundinger. Corder & Engle, P.C. Firm's address 475 Lincoln Street \$200 Denver, Co 80203 May the IRS discuss this return with the preparer shown above? (see instructions) 13, 135, 434. 12, 738, 761. 140, 140, 140, 140, 140. 15, 1743, 207. 1, 1950, 477. 1	Se	16a	Professional fundraising fees (Part IX, column (A),	· · · · · · · · · · · · · · · · · · ·									
Total expenses. Add fines is Truchy solumn (A), line 25) 13 135, 434. 12, 738, 761. 19 Revenue less expenses. Subtract line 14 truch line 12 20 Total assets (Part X, line 16) 21 Total liabilities (Part X, line 26) 22 Net assets or fund balances. Subtract line 21 from line 20 23 Signature Block 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 penalties of perjury and title. Print/Type preparer's name Paid Preparer Signature of officer Print/Type preparer's name Steven R. Corder Firm's name Kundinger. Corder & Engle, P.C. Firm's address 475 Lincoln Street \$200 Denver, Co 80203 May the IRS discuss this return with the preparer shown above? (see instructions) 13, 135, 434. 12, 738, 761. 140, 140, 140, 140, 140. 15, 1743, 207. 1, 1950, 477. 1	ē	b	Total fundraising expenses (Part X, column 20) Jun										
18 Total expenses. Add times Strict that it and the following 12 19 Revenue less expenses. Subtract line Hetropoline 12 10 Total assets (Part X, line 16) 20 Total assets (Part X, line 26) 21 Total liabilities (Part X, line 26) 22 Net assets or fund balances. Subtract line 21 from line 20 23 Net assets or fund balances. Subtract line 21 from line 20 24 Net assets or fund balances. Subtract line 21 from line 20 25 Net assets or fund balances. Subtract line 21 from line 20 26 Net assets or fund balances. Subtract line 21 from line 20 27 Net assets or fund balances. Subtract line 21 from line 20 28 Net assets or fund balances. Subtract line 21 from line 20 29 Net assets or fund balances. Subtract line 21 from line 20 20 Total assets (Part X, line 16) 30 Net assets or fund balances. Subtract line 21 from line 20 31 Net assets or fund balances. Subtract line 21 from line 20 32 Net assets or fund balances. Subtract line 21 from line 20 33 Net assets or fund balances. Subtract line 21 from line 20 32 Net assets or fund balances. Subtract line 21 from line 20 33 Net assets (Part X, line 16) 35 Net assets (Part X, line 16) 36 No.999, 759. 38 No.999, 759. 30 No.999,	ŭ	17				7,907,09	97. 8,219,271.						
19 Revenue less expenses. Subtract line + 1 tropologie 12 332,959. <165,209.3						13,135,43	12,738,761.						
Beginning of Current Year End of Year						<332,95	9.> <165,209.						
Total assets (Part X, line 16) 21 Total liabilities (Part X, line 26) 22 Net assets or fund balances. Subtract line 21 from line 20 23 Net assets or fund balances. Subtract line 21 from line 20 24 Net assets or fund balances. Subtract line 21 from line 20 25 Net assets or fund balances. Subtract line 21 from line 20 26 A 1,743,207. 27 Net assets or fund balances. Subtract line 21 from line 20 28 Net assets or fund balances. Subtract line 21 from line 20 29 Net assets or fund balances. Subtract line 21 from line 20 20 Net assets or fund balances. Subtract line 21 from line 20 21 1,743,207. 22 Net assets or fund balances. Subtract line 21 from line 20 29 1,743,207. 20 1,950,477. 20 1,950,477. 20 1,950,477. 21 2	50	3	Trovoltad load experience.	J		Beginning of Current Ye	ar End of Year						
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 peclaration of preparer (other than officer) is based on all information of which preparer has any knowledge. Sign Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No	ets	20	Total assets (Part X line 16)										
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 peclaration of preparer (other than officer) is based on all information of which preparer has any knowledge. Sign Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No	Ass	21											
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 peclaration of preparer (other than officer) is based on all information of which preparer has any knowledge. Sign Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No	E SE	22	•	line 20		1,743,20							
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. Sign Here Marvin Tuttle, CEO	P	antill			L		 						
true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge. Sign Here Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No				including accompanying schedul	les and state	ments, and to the best o	of my knowledge and belief, it is						
Sign Here Signature of officer Date			<i></i>										
Here Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) Preparer Date	_	,				1//	6/12_						
Here Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) Marvin Tuttle, CEO Type or print name and title Print/Type preparer's name Check PTIN Firm's ElN Firm's ElN Phone no. 303-534-5953	Sic	ın	Signature of officer		-	Date							
Type or print name and title Print/Type preparer's name Steven R. Corder Preparer Firm's name Kundinger, Corder & Engle, P.C. Use Only Firm's address A75 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) The control of the control	_		Marvin Tuttle CEO										
Paid Steven R. Corder Corder & Engle, P.C. Firm's EIN Use Only Firm's address 475 Lincoln Street #200 Denver, CO 80203 Phone no. 303-534-5953 May the IRS discuss this return with the preparer shown above? (see instructions)	•••	. •				·							
Paid Steven R. Corder	_		Print/Type preparer's name	Preparer's signature		Date Check	PTIN						
Preparer Use Only Firm's name Kundinger, Corder & Engle, P.C. Firm's EIN	Pai	id	1			1-4-17 self-em	ployed P01363943						
Use Only Firm's address 475 Lincoln Street #200 Denver, CO 80203 May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No				e P.C.		\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	· · · · · · · · · · · · · · · · · · ·						
Denver, Co 80203 Phone no. 303-534-5953 May the IRS discuss this return with the preparer shown above? (see instructions) X Yes No		•		<u> </u>									
May the IRS discuss this return with the preparer shown above? (see instructions)		,				Phone no	303-534-5953						
	Ma	v tha l	· 	ove? (see instructions)		1							
					tions.		Form 990 (2010)						

Form	990 (2010) The Financial Planning Association	84-1521488	Page 2
	Statement of Program Service Accomplishments		
	Check if Schedule O contains a response to any question in this Part III		х
1	Bnefly describe the organization's mission:		·
•	FPA is the community that fosters the value of financial planning and		
	advances the financial planning process.		
2	Did the organization undertake any significant program services during the year which were not listed on	•	
_	the prior Form 990 or 990-EZ?	Г	Yes X No
	If "Yes," describe these new services on Schedule O.	_	
2	Did the organization cease conducting, or make significant changes in how it conducts, any program services?		Yes X No
3			
	If "Yes," describe these changes on Schedule O.	onese	
4	Describe the exempt purpose achievements for each of the organization's three largest program services by exp		
	Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of g	rants and	
	allocations to others, the total expenses, and revenue, if any, for each program service reported.		
4a	(Code:) (Expenses \$ including grants of \$) (RefPA Denver 2010- FPA Denver 2010 is an organization-wide effort that is	veune à	
	the single largest non-dues revenue source for the association. The		
	event spotlights FPA's core competencies of: Knowledge, Community,		
	Advocacy and Leadership. Registrations showed a modest improvement over	 	
	2009, with total registration revenue at \$859,325, up \$94,299. Total		
	registration was 2432 over 2248 in 2009. This was viewed as a positive		
	indicator for future conference performance. Many exhibitors expressed		
	their satisfaction with the exhibit hall traffic and had an overall		
	positive experience with the target audience. The Professional		
	Development Pavilion in the exhibit hall offered attendees additional	 	
	education and CE opportunities, with several sessions' standing room		
	only. The new FPA brand was launched during the conference and was		
4b	(Code:) (Expenses \$ including grants of \$) (Re	venue \$)
	Member Relations- The FPA Member Relations department ensures that		
	existing and prospective members are fully aware of all of the benefits		
	that the Financial Planning Association makes available to support		
	financial planners and their practices. These benefits include		
	consumer education and awareness of the value of financial planning as		
	well as advocacy on behalf of the profession. Benefits also include		
	knowledge in terms of tools, resources, ongoing certification education		
	and technical journals to improve communication with their clients,		
	increase efficiency and effectiveness in their practice and to help		
	them advance in their chosen career. Member Relations is also		
	responsible for serving members by answering their questions and		
	addressing their concerns as well as ensuring that they are taking full		
4c	(Code:) (Expenses \$ including grants of \$) (Re	venue \$)
	FPA Retreat 2010- FPA Retreat 2010 is a long-standing tradition within		
	FPA. It is an event that attracts the "best and brightest" of the		
	profession due to its level of intimacy, community learning and		
	advanced, cutting edge content. Retreat this year represented a highly		
	positive turning point due to its great performance. Registration		
	revenue exceeded budget by approximately \$45,000. The sponsorship model		
	was adjusted to maximize revenue opportunities and ensure an excellent		
	experience for sponsors and attendees alike. Cost savings managed by		
	the Meetings department contributed to the overall positive net revenue		
	results for the organization.		
	<u> </u>		
4d	Other program services. (Describe in Schedule O.)		
TU	(Expenses \$ including grants of \$) (Revenue \$)	

4e Total program service expenses

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		X
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2		Х
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for	3		x
	public office? If "Yes," complete Schedule C, Part I	- <u>\$</u> -		
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4		ŀ
E	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or	-		_
5	similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5	х	
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		х
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		х
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete			
	Schedule D, Part III	8		Х
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		Х
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		Х
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VIII, VIII, IX, or X			
	as applicable.		ļ	ļ
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,	110	х	
	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	11a	-	-
D	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		x
c	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	11c		х
d	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	11d		х
е	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	Х	
f	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 (ASC 740)? If "Yes," complete Schedule D, Part X	11f		Х
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete			<u>"</u>
	Schedule D, Parts XI, XII, and XIII	12a		Х
D	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional	12b	x	
12	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	<u> </u>	х
13	Did the organization maintain an office, employees, or agents outside of the United States?	14a		x
	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, Parts I and IV	14b		х
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 United States? If "Yes," complete Schedule F, Parts II and IV	15		х
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 United States? If "Yes," complete Schedule F, Parts III and IV	16		Х
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,			l
	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines	4.0		х
40	1c and 8a? If "Yes," complete Schedule G, Part II	18	 	 ^-
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	}	x
200	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20a	 	x
	If "Yes" to line 20a, did the organization attach its audited financial statements to this return? Note. Some Form 990 filers that			
	operate one or more hospitals must attach audited financial statements (see instructions)	20b	1	<u></u>
		_	ggn /	

Form 990 (2010)

The Financial Planning Assorbative Checklist of Required Schedules (continued)

21 but the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, coursing Mills in 1911 "Yes," complete Schedule I. Parts I and II 21 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 21 II "Yes," complete Schedule I. Parts I and III 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 21 II "Yes," complete Schedule I. Parts II and III 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 21 II "Yes," complete Schedule I. Parts II (II) Schedule II (II) Schedule II (II) Schedule II (II) Schedule II (III) Schedule III (III) Schedul	Yes	No
22 both eorganization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III! 23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, frustees, key employees, and highest compensated employees? If "Yes," complete Schedule Schedule II years I as a section of the user as a section of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "Wo", go to line 25 24e Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24d Did the organization and the organizations. Did the organization gerow at any time during the year? 24d Did the organization and the organizations. Did the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction has not or bring and the organization and part to a business transaction with one of the		
column (A), line 2? If "Yes," complete Schedule I, Parts I and III 22 Did the organization answer "Yes" to Part VII, Section A, line 3.4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J. 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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No", go to line 25 Did the organization maintain an ascrow account other than a refunding escrow at any time during the year of defease any tax-exempt bonds? Did the organization maintain an ascrow account other than a refunding escrow at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds of the organization on any of the organization on the year. Did the organization on provide a garner orficer, director, trustee, wey are propered. The year of the year of the year of year of year of year		X
Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, frustees, key employees, and highest compensated employees? If "Yes," complete Schedule K if "No", go to line 25 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? If "Yes," answer lines 24b through 24d and complete Schedule K if "No", go to line 25 Did the organization ninest any proceeds of tax-exempt bonds beyond a temporary period exception? Did the organization ninest any proceeds of tax-exempt bonds beyond a temporary period exception? Did the organization ninest any proceeds of tax-exempt bonds beyond a temporary period exception? Did the organization ninest any proceeds of tax-exempt bonds outstanding a scrow at any time during the year? 24a Did the organization ninest any proceeds of tax-exempt bonds outstanding a scrow at any time during the year? 24b Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person in a prior year, and that the transaction bas not been reported on any of the organization's prior Forms 990 or 990-E27 If "Yes," complete Schedule L, Part I V 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? If "Yes," complete Schedule L, Part IV Was a loan to or by a current or former officer, director, trustee, key employee or the subject of the organization or former officer, director, trustee, or key employee or a family member of a current or former officer, or key employee? If "Yes," complete Schedule L, Part IV A remainded by the organization receives more than \$25,000 in non-cash contributions? If "Yes," complete Schedule L, Part IV A remainded by the organization receives more		x
and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J 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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No", go to five 25 b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary penod exception? Did the organization maintain an escrow account other than a refunding escrow at any time during the year? to defease any tax-exempt bonds? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Did the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction have a constituted to a property of the organization and that the transaction have a constituted on the organization and that the transaction have a constituted on the organization and the end of the organization or officer, director, trustee, key employee, highly compensated employee, or disqualified person in a prior yes," complete Schedule L, Part IV Did the organization provide a grant or other assistance to an officer, director, trustee, key employee? If "Yes," complete Schedule L, Part IV As the organization process or provide and exceptions): A current or former officer, director, trustee, or key employee? If "Yes," comp	_	
Schedule J 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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No", go to line 25 25b Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 25c Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? 25d Section 501(e)(3) and 501(e)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year! If "Yes," complete Schedule L, Part I 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 pror Forms 990 or 990-E27 If "Yes," complete Schedule L, Part I is the organization provide a grant or other assistance to an officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II is Did the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV is a Acument of former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is Armily member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is Armily member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is Armily member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is Armily member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is Armily of the organization receive more than \$2		
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? If "Yes," answer lines 24b through 24d and complete Schedule K. If No", go to line 25 b Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 24d Section 501(x)3) and 501(c)(4) organizations. Did the organization engage 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 with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization with a disqualified person in a prior year, and that the transaction are not been reported on any of the organization with a disqualified person in a prior year, and that the transaction are not been reported on any of the organization with a disqualified person in a prior year, and that the transaction provide a grant or other assistance to an officer, director, trustee, key employee, highly compensated employee, or disqualified person on a prior and the organization is at year? If "Yes," complete Schedule L, Part IV 25b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV C An entity of which a current of former officer, direc	х	
last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K, If "No", go to line 25 b Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 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? 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 uning the year? If "Yes," complete Schedule L, Part I I 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? If "Yes," complete Schedule L, Part II is the organization provide a grant or other assistance to an officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II is schedule L, Part II is an experiment of organization or tax year? If "Yes," complete Schedule L, Part IV instructions for applicable faling thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV instructions or applicable faling thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV instructions? If "Yes," complete Schedule II is an instruction of organization receive contributions of art, histonical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule II is any related organization organization organization organization and instructions or in		
Schedule K. If "No", go to line 25 b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 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? If "Yes," complete Schedule I, Part I Is the organization water 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-E27 if "Yes," complete Schedule L, Part II 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? If "Yes," complete Schedule L, Part II The theory of the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV as the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV as A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV B off the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule L, Part IV B o		
b Did the organization mest any proceeds of tax-exempt bonds beyond a temporary period exception? 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? 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? If "Yes," complete Schedule L, Part I 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 pror Forms 990 or 990-E2? If "Yes," complete Schedule L, Part II 25b 26c 27 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? If "Yes," complete Schedule L, Part II 27 Was 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? If "Yes," complete Schedule L, Part IV 28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV 29 Was the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV 29 Did the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule L, Part IV 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization in the parties of the part III 31 Did the organization related to any tax-exempt or taxable entity? 32 If "Yes," complete Schedul		х
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 Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 24d Ses 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? If "Yes," complete Schedule L, Part I 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-E27 If "Yes," complete Schedule L, Part I is the organization or organization or the assistance to an officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II is a loan to or by a current or former officer, director, trustee, it is expected to such an individual? If "Yes," complete Schedule L, Part II is a current or former officer director, trustee, or a person related to such an individual? If "Yes," complete Schedule L, Part IV is a family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is a Carrent or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is a Carrent or indirect owner? If "Yes," complete Schedule L, Part IV is a Carrent or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV is a complete Schedule M, Part II is any related organization related to any ta		
any tax exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 24d 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? If "Yes," complete Schedule L, Part I 25b 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-E27 if "Yes," complete Schedule L, Part I 25b 25b 26t 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? If "Yes," complete Schedule L, Part II 25b 27d 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? If "Yes," complete Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 25b b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 25c 27d Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule L, Part IV 25c 27d Did the organization inducate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part II 31c 27d Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part II 31c 27d Did the organization with 1000 of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-37 If "Yes," complete Schedule R, Part II, III, IV, and IV, III III 31c 27d Did the organization receive any pay		
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? If "Yes," complete Schedule L, Part I 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? If "Yes," complete Schedule L, Part I I		
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-E27 If "Yes," complete Schedule L, Part I 25b 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" If "Yes," complete Schedule L, Part II 26c 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? If "Yes," complete Schedule L, Part IV 27c I was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV 28d a Current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28d b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28d c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28d Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule I, Part IV 28d Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule II 39d Did the organization liquidate, terminate, or dissolve and cease operations? 39d If "Yes," complete Schedule II, Part I 39d Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule II, Part I 39d Did the organization of liquidate, terminate, or dissolve and cease operations? 39d I be organization of liquidate, terminate, or dissolve and cease operations? 39d Did the organization of liquidate, termina		
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? If "Yes," complete Schedule L, Part II 25b 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? If "Yes," complete Schedule L, Part II 26 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? If "Yes," complete Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28a A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 27a A entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 27a Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule II (Yes," complete Sc		
that the transaction has not been reported on any of the organization's prior Forms 990 or 990-E27 // "Yes," complete Schedule L, Part // 25b 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? // "Yes," complete Schedule L, Part // 26 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? // "Yes," complete Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV instruction or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV instruction or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV instructions? // "Yes," complete Schedule M instructions? // "Yes," complete Schedule M instructions? // "Yes," complete Schedule M instructions? // "Yes," complete Schedule M, Part I instructions? // "Yes," complete Schedule R, Part I, // "Yes," complete Schedul		
Schedule L, Part I 28 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? If "Yes," complete Schedule L, Part II 29 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? If "Yes," complete Schedule L, Part III 20 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): 21 a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 22 b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 23 c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 24 c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 25 c Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 26 d) Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 27 d) Did the organization liquidate, terminate, or dissolve and cease operations? 28		1
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 "Yes," complete Schedule L, Part II 26 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? // "Yes," complete Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV 28a A family member of a current or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV 28b A family member of a current or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV 28b A family member of a current or former officer, director, trustee, or key employee? // "Yes," complete Schedule L, Part IV 28b Did the organization receive more than \$25,000 in non-cash contributions? // if "Yes," complete Schedule M 29 Did the organization receive more than \$25,000 in non-cash contributions? // if "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? // if "Yes," complete Schedule N, Part I 31 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? // "Yes," complete Schedule R, Part I / in part I/ "Yes," complete Schedule R, Part I / in part I/ "Yes," complete Schedule R, Part II / in part I/		
person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II 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? If "Yes," complete Schedule L, Part IV a Yas 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? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule N, Part I Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-3? If "Yes," complete Schedule R, Part I The yes," complete Schedule R, Part II, II, V, and V, line 1 Say Palead organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 The organization conduct more than 5% of its activities through an entity that is not a related organization? If "Yes," complete Schedule R, Part V, line 2 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 federa		<u> </u>
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? If "Yes," complete Schedule L, Part III 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? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28b Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M, Part II Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part II Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I I Did the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, Ime 1 31 Bid the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, Ime 2 32 Did the organization conduct more than 5% of its activities through an entity that is not a related organization? If "Yes," complete Schedule R, Part V, Ime 2 33 Did the organization conduct more than 5% of its activities through an entity that is not a related organization? If "Yes," complete Schedule R, Part V, Ime 2		l
contributor, or a grant selection committee member, or to a person related to such an individual? If "Yes," complete Schedule L, Part III 278 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filling thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28a A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 29c Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M, Part II 30 Did the organization inquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part II 31 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 31 Is any related organization a controlled entity within the meaning of section 512(b)(13)? 32 Is any related organization a controlled entity within the meaning of section 512(b)(13)? 33 Is any related organization a controlled entity within the meaning of section 512(b)(13)? 34 Is any related organization and controlled entity within the meaning of section 512(b)(13)? 35 Is any related organization or eceive any payment from or engage in any transaction with a controlled entity within the meaning of section 501(c)(3) organizations	ļ	X
Schedule L, Part III 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? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 28b Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M Did the organization iquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 Section 501(c)(3)? If "Yes," complete Schedule R, Part V, line 2 Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Did the organization conduct more than 5% of its activities through an entity that is not a related organization? If "Yes," complete Schedule R, Part V, line 2 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note, All Form		
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? If "Yes," complete Schedule L, Part IV 28a b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28c c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28c 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 29 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets?If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Did the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 Was the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 35 Io the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 501(c)(3)? If "Yes," complete Schedule R, Part V, line 2 36 Did the organization conduct more than 5% of its activities through an entity that is not a related organization? If "Yes," complete Schedule R, Part V, line 2 37 Did the organization complete Schedule O and provide explanations in Sched		x
instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 28a b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 28b 10b Id the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 10b Id the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 10b Id the organization liquidate, terminate, or dissolve and cease operations? 11 "Yes," complete Schedule N, Part I 12 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 13 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 13 Ju the organization related to any tax-exempt or taxable entity? 15 If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 16 Is any related organization a controlled entity within the meaning of section 512(b)(13)? 17 If "Yes," complete Schedule R, Part V, line 2 18 Ju the organization conduct more than 5% of its activities through an entity that is not a related organization? 18 "Yes," complete Schedule R, Part V, line 2 19 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? 19 Note. All Form 990 filers are required to complete Schedule O for Part VI, lines 11 and 19?		A
a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 28c 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, IV, and V, line 1 34 Was the organization a controlled entity within the meaning of section 512(b)(13)? 35 Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 Did the organization conflete Schedule O and provid		
b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 28c 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part II 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 31 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 32 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, V, and V, line 1 33 Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 34 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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	\$/\$r	X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 28c 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 Is any related organization a controlled entity within the meaning of section 512(b)(13)? 35 Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 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? If "Yes," complete Schedule R, Part VI 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		x
director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 Uses the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 35 Did the organizations. Did the organization bud the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 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? If "Yes," complete Schedule R, Part V, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O for Part VI, lines 11 and 19?	 	
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 32 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 33 Us any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 34 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part V I 37 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		x
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 Using the organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 35 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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		х
contributions? If "Yes," complete Schedule M 31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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		
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 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? If "Yes," complete Schedule R, Part I 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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		х
If "Yes," complete Schedule N, Part I Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 Say related organization a controlled entity within the meaning of section 512(b)(13)? Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 Bid 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		
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 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? If "Yes," complete Schedule R, Part I 33 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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		х
Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 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		
sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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	ļ	х
 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 34 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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 		
If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 Is any related organization a controlled entity within the meaning of section 512(b)(13)? Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 Bid 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		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 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? If "Yes," complete Schedule R, Part VI 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		
a Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 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	X	ļ
section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 37 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	X	
 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		
If "Yes," complete Schedule R, Part V, line 2 36 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? If "Yes," complete Schedule R, Part VI 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		
 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? If "Yes," complete Schedule R, Part VI 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 		
and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI 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	\vdash	
 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 		x
Note. All Form 990 filers are required to complete Schedule O 38	 	<u> </u>
1101071111011110101101101101101101101101	х	
Form	990	(2010)

Form 990 (2010) The Financial Planning Association

Part V Statements Regarding Other IRS Filings and Tax Compliance

	Check if Schedule O contains a response to any question in this Part V			ᆜ
			Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable			
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	X	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,			
	filed for the calendar year ending with or within the year covered by this return 2a 78			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	Х	<u> </u>
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. (see instructions)			
За	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	Х	
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b	Х	
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		х
b	If "Yes," enter the name of the foreign country: ►			
	See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.			
	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a_		х
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		Х
	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	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		x
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).			
а	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		
þ	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
C	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required			
	to file Form 8282?	7c		<u> </u>
d	If "Yes," indicate the number of Forms 8282 filed during the year			ļ
е	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		<u> </u>
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		<u> </u>
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		<u> </u>
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting		 	ļ
	organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8		<u> </u>
9	Sponsoring organizations maintaining donor advised funds.			
а	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		<u> </u>
10	Section 501(c)(7) organizations. Enter:			
_	Initiation fees and capital contributions included on Part VIII, line 12			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities			
11	Section 501(c)(12) organizations. Enter:			
a	Gross income from members or shareholders 11a	1		
b	Gross income from other sources (Do not net amounts due or paid to other sources against			
10-	amounts due or received from them.) Section 4047(-V4) was greated a haritable truste let be avecaute filing Form 900 in liquid Form 10413	120		
	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? If "Yes." enter the amount of tax-exempt interest received or accrued during the year	12a	L	
_				
13	Section 501(c)(29) qualified nonprofit health insurance issuers.	13a		<u> </u>
а	Is the organization licensed to issue qualified health plans in more than one state?	138		<u> </u>
L.	Note. See the instructions for additional information the organization must report on Schedule O. Enter the amount of reserves the organization is required to maintain by the states in which the			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans			
_	organization is licensed to issue qualified health plans Enter the amount of reserves on hand 13b 13c			
C 14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a		x
	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b		\vdash
	11 100, riab it flied a 1 offir 720 to report triese payments 1 11 110, provide an explanation in deficultion		990	(2010)

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

	Cheek if Cahadula O contains a reaspance to any question in this Bort VI			x
	Check if Schedule O contains a response to any question in this Part VI			
sec	tion A. Governing Body and Management		Yes	N-
_	Enter the number of voting members of the governing body at the end of the tax year	8	res	No
	Enter the flamber of young members of the governing body at the one of the tax you	-		
b	Effect the fidiliber of voting members included in line 14, above, who are independent	4		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other	<u> </u>		x
	officer, director, trustee, or key employee?	2		-
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		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		Х
6	Does the organization have members or stockholders?	6	х	
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the			l
	governing body?	7a		X
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	ļ. <u></u>	х
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year			
	by the following:			نـــــا
а	The governing body?	8a	х	ļ
b	Each committee with authority to act on behalf of the governing body?	8b	Х	<u> </u>
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	l	Х
<u>Sec</u>	tion 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	Х	<u> </u>
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	Х	<u> </u>
11a	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11a	Х	ļ
þ	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			ļ i
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	Х	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise	1		
	to conflicts?	12b	Х	
C	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe		l	
	ın Schedule O how this is done	12c	х	L
13	Does the organization have a written whistleblower policy?	13	X	
14	Does the organization have a written document retention and destruction policy?	14	X_	
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?		ļ	
а	The organization's CEO, Executive Director, or top management official	15a	х	
b	Other officers or key employees of the organization	15b	Х	L.
	If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions.)		Ì	
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		Х
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation		1	
	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		<u> </u>
Sec	tion C. Disclosure			
17	List the states with which a copy of this Form 990 is required to be filed ▶ co			
18	Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available	e for		
	public inspection. Indicate how you make these available Check all that apply.			
	X Own website Another's website X Upon request			
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy,	and fina	incial	
	statements available to the public.			
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization	ation:	-	
	Curtis Niepoth - 303-759-4900			
	7535 E. Hampden Ave., No. 600, Denver, CO 80231			

Part VIII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated **Employees, and Independent Contractors**

Check if Schedule O contains a response to any question in this Part VII

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

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter-0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

- List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- 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.

List persons in the following order individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons

(A)	(B)			-	C)			(D)	(E)	(F)
Name and Title	Average hours per week	┝÷	hecl	Pos all 1			oly) I	Reportable compensation from	Reportable compensation from related	Estimated amount of other
	(describe hours for related organizations in Schedule O)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	the organization (W-2/1099-MISC)	organizations (W-2/1099-MISC)	compensation from the organization and related organizations
Richard Salmen										
Chair	5.00	Х		х				0.	0.	0.
Tom Potts					ŀ					
President/Chair	5.00	х		х				0.	0.	0.
Martin Kurtz										
President	5.00	х	_	х				0.	0.	0.
Paul Auslander		İ				1	1			
President- elect	5.00	x		Х				0.	0.	0.
Lee Baker										
Director	5.00	х	L	L	L	L		0.	0.	0.
Michael Branham										
Director	5.00	х						0.	0.	0.
Diana DeCharles										
Director	5.00	x	<u> </u>					0.	0.	0.
Samuel J. Gallucci			1			l				
Director	5.00	х					L	0.	0.	0,
Edward Gjertsen II										
Director	5.00	x						0.	0.	0.
Vern Hayden						Γ				
Director	5.00	x						0.	0.	0.
Paula Hogan										
Director	5.00	х			l		1	0.	0.	0.
A.R. Hoxton IV										
Director	5.00	х					<u> </u>	0.	0.	0.
David Huxford, Jr.		Γ	Γ							
Director	5.00	x						0.	0.	0.
Stephen Johnson			1							
Director	5.00	x			1	1		0.	0.	0.
Julie Littlechild		Γ								
Director	5.00	x	L	L	<u>L</u>			0.	0,	0.
Keith Loveland										
Director	5.00	x	L					0.	0.	0.
Mark L. Prendergast										<u> </u>
Director	5.00	х		L			\bot	0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)										
(A)	(B)							(D)	(E)	(F)
Name and title	Average hours per week	(c		Pos all		арр	ly)	Reportable compensation from	Reportable compensation from related	Estimated amount of other
	(describe hours for related organizations in Schedule	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Т оттег	the organization (W-2/1099-MISC)	organizations (W-2/1099-MISC)	compensation from the organization and related organizations
Christopher Rand										
Director	5.00	х						0.	0.	0.
Michael Smith				1		l				
Director	5.00	Х				L	L	0.	0.	0.
Janet Stanzak			1			ł				
Director	5.00	Х	L			L	L	0,	0.	0.
Karin Maloney Stifler										
Director	5.00	Х	L	_		<u> </u>		0.	0.	0.
James Tissot	1					l	İ			
Director	5.00	X	<u> </u>		L	_		0.	0.	0.
Kenneth Ziesenheim						l		İ		
Director	5.00	Х						0.	0.	0.
Marvin Tuttle, Jr.										
Executive Director/CEO	40.00			х		L		209,675.	5,376.	21,194.
Curtis Niepoth								ļ		
Assoc, Exec. Dir./CFO	40.00			х				139,110.	28,150.	18,955.
Lauren Schadle										
Assoc, Exec. Dir.	40.00			х				140,937.	6,595.	15,870.
1b Sub-total										
c Total from continuation sheets to Part VII, Section A 576,994. 0. 79,845.										
d Total (add lines 1b and 1c) 1,066,716. 40,121. 135,864.									135,864.	
2 Total number of individuals (including but i	not limited to th	nose	liste	ed a	bov	e) wl	no re	eceived more than \$100	0,000 in reportable	•

compensation from the organization

3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual 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? If "Yes," complete Schedule J for such individual Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

3		X
4	х	
5		Х

Section B. Independent Contractors

Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from

(A) Name and business address	(B) Description of services	(C) Compensation
Ideas with Impact		
1819 Polk St. #287, San Francisco, CA 94109	Production Services	246,179
Champion Exposition Services		
139 Campanelli Drive, Middleboro, MA 02346	Exposition Services	113,217

Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization 2

Part VIII Section A. Officers, Directors,		nplo I	oyee	s, a	nd l	ligh	<u>est</u>	Compensated Employ (D)		(5)
(A) Name and title	(B) Average hours	(c		Pos all 1	ition		ly)	Reportable compensation from	(E) Reportable compensation from related	(F) Estimated amount of
	per week	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	the organization (W-2/1099-MISC)	organizations (W-2/1099-MISC)	other compensation from the organization and related organizations
Daniel Barry										
oir Gov't Relations	40.00	L	_		ļ_	х	_	132,999.	0.	23,322
eslie Allen									_	
Director IT	40.00	L.		<u> </u>	_	х	_	125,704.	0.	13,328
Jean Cantey						l				
Managing Director	40.00	<u> </u>	₩	 	├-	х		109,212.	0.	17,436
David Cohen	10.00					x		104,788.	0.	14 000
Asst. Dir. Gov't Relations	40.00	-	⊢		-	<u> </u>	 	104,788.	0,	14,808
Phillips Hinch Asst. Dir. Gov't Relations	40.00					x		104,291.	0.	10,95
ASSC. DIF. GOV C RELACTORS	40.00		-	\vdash		<u> </u>	-	104,231.	,	10,55.
								1		
· · · · · · · · · · · · · · · · · · ·		H	 	-		┢╌				
		l								
		 			\vdash					
		H	 							
		Ι-				Г				
				1		l				
										·
			<u> </u>				L			
		<u> </u>			$oxed{oxed}$	<u> </u>	L.			
	ļ			İ						
		┡	ļ	_	┖	┞-	ļ_			
	İ						{			
		├	↓_	╙	<u> </u>	ļ	<u> </u>			-
			1	l						
		-		├-	├-	┢	├			<u>.</u>
	l	1		l	1					
	+	\vdash	\vdash	╁	\vdash	┼	-			
		1								
		\vdash	+	+	\vdash	╁	+-			
		1								
	+	\vdash	1	T	t^-	\vdash	\vdash	-		
		_				•			·	
Total to Part VII, Section A, line 1c								576,994.		79,845

	rt VII	Statement of Rever	iue		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
rts stc	1 a	Federated campaigns	1a					
Contributions, gifts, grants and other similar amounts	b	Membership dues	. 1b					
a, E		Fundraising events	. <u>1c</u>					
g'a		Related organizations	1d					
Simis	е	Government grants (contribut						,
	f	, , , ,	1 1		İ			
율히		similar amounts not included abo						
등	_	Noncash contributions included in lines	1a-1f \$					
"	n	Total. Add lines 1a-1f		Business Cada				
_	•	Membership dues	ļ	Business Code 900099	8,006,932.	8,006,932.		
Š	2 a			900099	1,417,477.	1,417,477.		.
Je 8	b	T		900099	1,392,222.	1,392,222.		
E §	d	——————————————————————————————————————	 -	900004	1,109,704.	1,006,100.	103,604.	
Program Service Revenue	u a	Website Advertising		900004	192,192.	2,000,200.	192,192.	
٦.	f		enue	511120	29,260.	29,260.	,	
- }		Total. Add lines 2a-2f	1	—	12,147,787.	,		
	3	Investment income (including	dıvidends, ıntere		,			·
	-	other similar amounts)	,	· •	109,791.			109,791.
	4	Income from investment of ta	x-exempt bond p	roceeds				
	5	Royalties	, .	▶	80,963.			80,963.
		•	(ı) Real	(II) Personal	-			
	6 a	Gross Rents						
	b	Less: rental expenses						
	c	Rental income or (loss)						
l	d	Net rental income or (loss)		>				
-	7 a	Gross amount from sales of	(i) Securities	(II) Other	ļ			
		assets other than inventory	62,197.					
	b	Less: cost or other basis						
		and sales expenses						
		Gain or (loss)	62,197.					
l		Net gain or (loss)	1	<u> </u>	62,197.			62,197.
enue	8 a	Gross income from fundraisin including \$	g events (not					
Other Reve		contributions reported on line	1c). See					
힐		Part IV, line 18	а					;
₹		Less: direct expenses	b			-		
l		Net income or (loss) from fund	-	<u> </u>				•
	9 a	Gross income from gaming ac				1		
		Part IV, line 19	a					,
		Less: direct expenses	b					
		Net income or (loss) from gan						
İ	10 a	Gross sales of inventory, less		241,993.				
		and allowances	a b	93,182.				
		Less: cost of goods sold	- 1	33,102.	148,811.	148,811.		
t		Net income or (loss) from sale Miscellaneous Revenu		Business Code				
Ì	11 4	Miscellaneous income		900099	24,003.	24,003.		
	ıı e	• • •		-		 ' - ' 		
						-		
			····					
		Total. Add lines 11a-11d	•	•	24,003.			
_	12	Total revenue. See instructions.		_	12,573,552.	12,024,805.	295,796.	252,951.
03200	9							Form 990 (2010)

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).

	not include amounts reported on lines 6b, 3b, 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		evhenses	general expenses	OAPERISES
	organizations in the U.S. See Part IV, line 21				
2	Grants and other assistance to individuals in				
2	the U.S. See Part IV, line 22				
3	Grants and other assistance to governments,				
3	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,				
5	trustees, and key employees	581,678.			
6	Compensation not included above, to disqualified				
0	persons (as defined under section 4958(f)(1)) and				
	persons described in section 4958(c)(3)(B)				
-	· .	3,283,358.			
7	Other salaries and wages Pension plan contributions (include section 401(k)	3,203,000.			<u> </u>
8	and section 403(b) employer contributions)	49,960.			
_	, , , , , , , , , , , , , , , , , , ,	325,786.			
9	Other employee benefits Payroll taxes	278,708.			
10	Fees for services (non-employees):	2,0,,00.		 	
11	` ' ' '				
a	Management	38,971.	<u>-</u>		
b	Legal	37,444.	· · · · · · · · · · · · · · · · · · ·		
C	Accounting	176,792.			
d	Lobbying Professional fundraining converse See Part IV line 17	170,752.			
e	Professional fundraising services. See Part IV, line 17				<u> </u>
f	Investment management fees	543,503.		· · · · · · · · · · · · · · · · · · ·	
g	Other	670,743.	·		
12	Advertising and promotion	752,753.			
13	Office expenses	336,198.			
14	Information technology	330,170.			<u> </u>
15	Royalties	424,559.	·· ·····		+
16	Occupancy	447,307.			
17	Travel .		·		
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
40	· · · · · · · · · · · · · · · · · · ·	1,381,802,			<u> </u>
19	Conferences, conventions, and meetings Interest				
20		1,369,414.	· · · ·		
21	Payments to affiliates Depreciation, depletion, and amortization	532,749.			1
22	•	31,015.			
23 24	Insurance Other expenses. Itemize expenses not covered	31,013.	· · · · · · · · · · · · · · · · · · ·		†
24	above. (List miscellaneous expenses in line 24f. If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule 0.)	i			
а	Member subscriptions	951,449.	· · · · · · · · · · · · · · · · · · ·		
b	Branding initiative	530,565.	· · · · · · · · · · · · · · · · · · ·		
c	Dues, subs. & awards	70,720.			
d	Income Taxes	20,362.			
e	Reimbursed expenses	<313,417.	>		
f	All other expenses	216,342.			
25	Total functional expenses. Add lines 1 through 24f	12,738,761.			
26	Joint costs. Check here if following SOP			1	
20	98-2 (ASC 958-720). Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				
03201	0 12-21-10		· · · · · · · · · · · · · · · · · · ·		Form 990 (2010

Part X Balance Sheet (B) (A) Beginning of year End of year 1 Cash - non-interest-bearing 1,452,075 1,825,346. 2 Savings and temporary cash investments 3 Pledges and grants receivable, net 65,556 172,624. 4 Accounts receivable, net 4 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II 5 of Schedule L Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary 6 employees' beneficiary organizations (see instructions) 7 Notes and loans receivable, net 8 Inventories for sale or use Я 499 425 489 981. 9 Prepaid expenses and deferred charges 10a Land, buildings, and equipment: cost or other 2.864.903 basis. Complete Part VI of Schedule D 10a 2,545,407 759.618 319,496. b Less: accumulated depreciation 10b 10c 5,541,051. 4,998,806 11 Investments - publicly traded securities 11 8,024. 8,024. 12 Investments - other securities. See Part IV, line 11 Investments - program-related. See Part IV, line 11 13 13 14 14 Intangible assets 316,255 82,918. 15 15 Other assets. See Part IV, line 11 8,099,759 8,439,440, 16 Total assets. Add lines 1 through 15 (must equal line 34) 16 880,977. 1,106,184. 17 17 Accounts payable and accrued expenses 18 18 Grants payable 5,362,774 5,351,576. 19 19 Deferred revenue Tax-exempt bond liabilities 20 20 21 Escrow or custodial account liability Complete Part IV of Schedule D 21 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II 22 of Schedule L 23 Secured mortgages and notes payable to unrelated third parties 24 Unsecured notes and loans payable to unrelated third parties 31,203. 112,801 Other liabilities. Complete Part X of Schedule D 25 6,356,552. 6,488,963. 26 Total liabilities. Add lines 17 through 25 26 Organizations that follow SFAS 117, check here > X and complete lines 27 through 29, and lines 33 and 34. Net Assets or Fund Balances 1,743,207 27 1,950,477, 27 Unrestricted net assets 28 28 Temporarily restricted net assets 29 29 Permanently restricted net assets Organizations that do not follow SFAS 117, check here complete lines 30 through 34. Capital stock or trust principal, or current funds 30 Paid-in or capital surplus, or land, building, or equipment fund 31 31 32 32 Retained earnings, endowment, accumulated income, or other funds 1,743,207 1,950,477, 33 33 Total net assets or fund balances 8,099,759 8,439,440. Total liabilities and net assets/fund balances

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

За

Х

Act and OMB Circular A-133?

SCHEDULE C (Form 990 or 990-EZ)

Political Campaign and Lobbying Activities

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

OMB No 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part V, 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, Part V, line 35a (Proxy Tax), then

• ;	Section 501(c)(4), (5), or (6) organiza	tions: Complete Part III.		··	
Nan	ne of organization			Empl	oyer identification number
	The Financ	ial Planning Association			84-1521488
Pa	rt I-A Complete if the org	ganization is exempt unde	r section 501(c)	or is a section 527 or	rganization.
2	Provide a description of the organic Political expenditures Volunteer hours	zation's direct and indirect politica	l campaign activities		
Pa	rt I-B Complete if the or	ganization is exempt unde	r section 501(c)	(3).	
ь	Enter the amount of any excise tax			▶\$	
	Enter the amount of any excise tax	, ,		_	
	If the organization incurred a section				Yes No
	Was a correction made?	,	•		Yes No
b	o If "Yes," describe in Part IV.				
Pa	art I-C Complete if the or	ganization is exempt unde	er section 501(c)	, except section 501(c)(3).
1	Enter the amount directly expende	d by the filing organization for sec	tion 527 exempt fund	tion activities > \$	
2	Enter the amount of the filing organ	nization's funds contributed to oth	er organizations for s	ection 527	
	exempt function activities			▶\$	
3	Total exempt function expenditure	s. Add lines 1 and 2. Enter here an	d on Form 1120-POL	-,	
	line 17b			▶\$	
4	Did the filing organization file Form	1120-POL for this year?			L Yes L No
5	Enter the names, addresses and e made payments. For each organiza contributions received that were p	ation listed, enter the amount paid	from the filing organi	zation's funds Also enter th	e amount of political
	political action committee (PAC). If	additional space is needed, provide	de information in Part	t 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

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990 or 990-EZ) 2010

Schedule C (Form 990 or 990-EZ) 2010	The Financial P	lanning Associat:	ion	84-15	21488 Page 2		
Part II-A Complete if the org	anization is exer	npt under sectio	n 501(c)(3) and fil	ed Form 5768			
(election under sec	tion 501(h)).						
A Check I if the filing organiza	tion belongs to an affi	liated group.					
B Check ▶ if the filing organiza	tion checked box A ar	nd "limited control" pro	ovisions apply.				
	ts on Lobbying Exper ditures" means amou)	(a) Filing organization's totals	(b) Affiliated group totals		
1a Total lobbying expenditures to influ	uence public opinion (grass roots lobbying)					
b Total lobbying expenditures to influ	uence a legistative boo	dy (direct lobbying)					
c Total lobbying expenditures (add li	nes 1a and 1b)						
d Other exempt purpose expenditure	es						
e Total exempt purpose expenditure	s (add lines 1c and 1c	I)					
f Lobbying nontaxable amount. Enter		e following table in bot	h columns	<u></u>			
If the amount on line 1e, column (a) o	r (b) is: The lob	bying nontaxable am	ount is:				
Not over \$500,000	20% of	the amount on line 1e.	· <u></u>				
Over \$500,000 but not over \$1,000		O plus 15% of the exc					
Over \$1,000,000 but not over \$1,5		0 plus 10% of the exc					
Over \$1,500,000 but not over \$17,		O plus 5% of the exce	ss over \$1,500,000.				
Over \$17,000,000	\$1,000,0	000.					
g Grassroots nontaxable amount (er	•		ļ		·		
h Subtract line 1g from line 1a. If zer	· .						
i Subtract line 1f from line 1c. If zero	•	4	-tuan fila Farma 4700		<u>. </u>		
j If there is an amount other than ze		line II, did the organiz	ation file Form 4720	[Yes No		
reporting section 4911 tax for this		eraging Period Under	Section 501/h)		Tes NO		
, ,	ations that made a s	ection 501(h) election	n do not have to comp es 2a through 2f on pa				
	Lobbying Exper	nditures During 4-Yea	ar Averaging Period				
Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) Total		
2a Lobbying nontaxable amount							
b Lobbying ceiling amount	1						
(150% of line 2a, column(e))	1 1						
c Total lobbying expenditures							
d Crassroots postsychia amayert							
d Grassroots nontaxable amount				<u> </u>			
e Grassroots ceiling amount (150% of line 2d, column (e))							
(10070 01 into 20, 00iditii1 (e))				 			
f Grassroots lobbying expenditures							

Schedule C (Form 990 or 990-EZ) 2010

Schedule C (Form 990 or 990-EZ) 2010 The Financial Planning Association 84-1521488 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)).

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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total 2 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information			(a	1)	(k) <u> </u>
local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of: a Volunteers? b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? c Media advertisements? d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 1: 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b If "Yes," enter the amount of any tax incurred under section 4912 c 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 filling organization incurred a section 4912 tax, did if the 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). 1 Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2.000 or less? 2 Did the organization agree to carryover lobbying and political expenditures from the pinner vear? 1 Dues, assessments and similar amounts from members 2 Section 162(e) nondeductible lobbying and political expenditures from the pinner vear? 1 Dues, assessments and similar amounts from members 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). 2 Current year 2 Did the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenses for which the amount on line 2 cexceeds the amount on line 3, what			Yes	No	Amo	ount
or referendum, through the use of: a Volunteers? b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? c Media advertisements? d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1 c through 1i 2 a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b if "Yes," enter the amount of any tax incurred by organization managers 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 as section 4912 tax, did if the 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). 1 Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization argee to carryover lobbying and political expenditures from the pnor year? 1 Dues, assessments and similar amounts from members Section 162(e) indeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). 2 Control was paid to be carryover from last year 2 b Carryover from last year 5 b Carryover from last year 5 control last organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures (see instructions) 5 Taxable amount of lobbying and political expenditures (see instructions) 8 Part IIV Supplemental Information	1	During the year, did the filing organization attempt to influence foreign, national, state or				
a Volunteers? b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? c Media advertisements? d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 1: 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred under section 4912 d If the filling organization incurred a section 4912 tax, did if the 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). Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only inhouse lobbying expenditures of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 2 Did the organization in the properties of \$2,000 or less? 3 Did the organization in the properties of \$2,000 or less? 4 Did the organization in the properties of \$2,000 or less? 5 Did the organization in the properties of \$2,000 or less? 5 Did the organization and similar amounts from members 4 Did the organization in the properties of \$2,000 or less? 5 Did the organization in th		local legislation, including any attempt to influence public opinion on a legislative matter				
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? c Media advertisements? d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If 'Yes,' describe in Part IV j Total, Add lines 1c through 1i 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b if 'Yes,' enter the amount of any tax incurred under section 4912 d if the filing organization incurred a section 4912 tax, idil 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). Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization induction of any tax incurred under section 501(c)(4), section 501(c)(5), or section 501(c)(6). Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization agree to carryover lobbying expenditures of \$2,000 or less? 2 2 X 3 Did the organization agree to carryover lobbying and political expenditures from the pnor year? 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 2 Section 150(c) (6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Part III-A, line 3 is answered "Yes." 2 Dues, assessments and similar amounts from members are secured in section 603(e)(1)(A) notices of nondeductible section 162(e) dues as 525,158. 3 Catom 152(e) nondeductible lobbying and political expenditures (do not include amounts of political expenditures (see instr		or referendum, through the use of:				
c Media advertisements? d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 11 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? 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 filling organization incurred a section 4912 tax, did if 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). 1 Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 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." Dues, assessments and similar amounts from members 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 2b 246, 5932. c Total 1 Current year 2b 246, 5932. c Total 3 A 97, 108. 5 Fart IIV Supplemental Information	а	Volunteers?		_		
d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Relilies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 1: 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred under section 4912 d If the filling organization incurred a section 4912 tax, did if 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). 1 Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 2 Did the organization agree to carryover lobbying and political expenditures from the prior year? 3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 3 Did the organization agree to carryover by the prior year answered "No" OR if Part III-A, line 3 is answered "Yes." 1 Dues, assessments and similar amounts from members 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). 2 a Current year 2 b 246, 5932. 2 total 3 Agregate amount reported in section 6033(e)(1)(A) notices of nondeductible lobbying and political expenditure next year? 4 Part III-A provided in section 6033(e)(1)(A) notices of nondeductible lobbying and political expenditure next year? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Taxable amount of lobbying and political	b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?				
e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 1: 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? 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 as except a 12 by 1 for the organization incurred a section 4912 as except 4912 as except 4912 as except 4912 as except 4912 as except 4912 by 1 for 491	С	Media advertisements?				
f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 1i 2a Did the activities? If "Yes," describe in Part IV if Total. Add lines 1c through 1i 2b 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). Vere substantially all (90% or more) dues received nondeductible by members? 1 Vere substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expension for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible lobbying and political expenditure next year? 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? 5 Taxable amount of lobbying and political expenditures (see instructions) Part IV Su	d	Mailings to members, legislators, or the public?				
g Direct contact with legislators, their staffs, government officials, or a legislative body? h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV j Total. Add lines 1 to through 1: 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b if "Yes," enter the amount of any tax incurred under section 4912 cl if "Yes," enter the amount of any tax incurred by organization managers under section 4912 d if the filling 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). 1 Were substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 1 Dues, assessments and similar amounts from members 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total 1 A 8,005,932. 2 B Carryover from last year c Total 1 A 8,006,932. 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 4 If notices were sent and the amount on line 2 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 expenditures (see instructions) 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Taxable amount of lobbying and political expenditures (see instructions)	е	Publications, or published or broadcast statements?				
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? i Other activities? If "Yes," describe in Part IV 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b If "Yes," enter the amount of any tax incurred by organization managers under section 4912 d If the filling 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? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 2 Tax 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 2 La 525, 158. b Carryover from last year c Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Part IV Supplemental Information	f	· · · · · · · · · · · · · · · · · · ·			· ·	
i Other activities? If "Yes," describe in Part IV j Total. Add lines 1c through 1i 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? 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 filling 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). Vere substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the pnor year? 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 "Yes," 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 5 Carryover from last year C Total Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Part IV Supplemental Information	_				_	
j Total. Add lines 1c through 11 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? 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? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the pnor year? 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible lobbying and political expenditure section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Part IV Supplemental Information						
Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred 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). Ver substantially all (90% or more) dues received nondeductible by members? 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the pnor year? 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 2 Did the organization agree to carryover lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 2 La 525,158. 2 La 525,158. C Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 4 If notices were sent and the amount on line 2 c exceeds the amount on line 3, what portion of the excess does the organization aggree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information	i	Other activities? If "Yes," describe in Part IV				
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 filling 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 Vere substantially all (90% or more) dues received nondeductible by members? 1 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 2 Did the organization agree to carryover lobbying and political expenditures from the prior year? 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year 2 Carryover from last year 2 Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Part IV Supplemental Information	j	Total. Add lines 1c through 1:				
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). Vere substantially all (90% or more) dues received nondeductible by members? 1	2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?				
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 Yes No 1 Were substantially all (90% or more) dues received nondeductible by members? 1	b	If "Yes," enter the amount of any tax incurred under section 4912				
Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6). Yes						_
Solic Soli				(E)		
Were substantially all (90% or more) dues received nondeductible by members? 1	Par		on 501(c)	(5), or se	ction	
Were substantially all (90% or more) dues received nondeductible by members? Did the organization make only in-house lobbying expenditures of \$2,000 or less? Did the organization agree to carryover lobbying and political expenditures from the prior year? 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 8,006,932,		301(c)(d).			Yes	No
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? 3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 8 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). 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 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 7 Supplemental Information	1	Were substantially all (90% or more) dues received nandeductible by members?				
3 Did the organization agree to carryover lobbying and political expenditures from the prior year? 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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information						-
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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total 2 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Taxable amount of lobbying and political expenditures (see instructions)	_			2	x	
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 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). a Current year b Carryover from last year c Total 2 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information			on 501(c)	(5), or se		
Dues, assessments and similar amounts from members Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). Current year Carryover from last year C Total Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? Taxable amount of lobbying and political expenditures (see instructions) Part IV Supplemental Information		501(c)(6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Pa				
2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). 2 Current year 2 Decomposition 2525,158. Carryover from last year 2 Total 2 Cecccccccccccccccccccccccccccccccccccc	1	Dues, assessments and similar amounts from members		1	8.	006,932.
expenses for which the section 527(f) tax was paid). 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 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information		,	ical		· · ·	•
a Current year b Carryover from last year c Total Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? Taxable amount of lobbying and political expenditures (see instructions) 2a 525, 158. 2b 246, 932. 2c 772,090. 3 674,982. 4 97,108. 5 Taxable amount of lobbying and political expenditures (see instructions) 5	_					
b Carryover from last year c Total 2 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information	а	· · · · · ·		2a		525,158.
c Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Supplemental Information		•				
Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? Taxable amount of lobbying and political expenditures (see instructions) Supplemental Information		·		<u> </u>		
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? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Part IV Supplemental Information	-					
does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? 5 Taxable amount of lobbying and political expenditures (see instructions) 7 Taxable amount of lobbying and political expenditures (see instructions) 8 Taxable amount of lobbying and political expenditures (see instructions)		SS S (XX)	cess			
expenditure next year? 5 Taxable amount of lobbying and political expenditures (see instructions) 5 Part IV Supplemental Information		•				
5 Taxable amount of lobbying and political expenditures (see instructions) Part IV Supplemental Information		· · · · · · · · · · · · · · · · · · ·	,	4		97,108,
Part IV Supplemental Information	5	•				•
			ad Dart II B	line 1. Alee		this part
	0. 4	ny additional information.				
or any additional information.						
or any additional information.						
or any additional mornation.						
or any additional mornation.						
or any additional mioritation.						
for any additional information.						
or any additional mornation.						
or any additional information.						

SCHEDULE D

(Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements
► Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No 1545-0047 Open to Public Inspection

Name of the organization

➤ Attach to Form 990. ➤ See separate instructions. **Employer identification number**

	The Financial Planning Asso			84-1521488		
Par	t I Organizations Maintaining Donor Advisor	ed Funds or Other Similar Funds of	or Accou	unts. Complete if the		
	organization answered "Yes" to Form 990, Part IV, Iir	ne 6.				
		(a) Donor advised funds	(b) Fun	nds 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					
		writing that the assets hold in depart advisor	d funds			
5	Did the organization inform all donors and donor advisors in		i lunus	Yes No		
	are the organization's property, subject to the organization's	_		Tes — NO		
6	Did the organization inform all grantees, donors, and donor		-			
	for charitable purposes and not for the benefit of the donor	or donor advisor, or for any other purpose co	onterring			
<u> </u>	impermissible private benefit?	1 NV - 1 1 5 000 D	+ 1) / 1 7	Yes No		
Par			rt IV, line 7.	•		
1	Purpose(s) of conservation easements held by the organization					
	Preservation of land for public use (e.g., recreation or		•			
	Protection of natural habitat	Preservation of a certific	ed historic	structure		
	Preservation of open space					
2	Complete lines 2a through 2d if the organization held a qual	ified conservation contribution in the form of	a conserv	ation easement on the last		
	day of the tax year.					
				Held at the End of the Tax Year		
а	Total number of conservation easements		_2a			
b	Total acreage restricted by conservation easements		2b			
C	Number of conservation easements on a certified historic st	ructure included in (a)	2c	<u> </u>		
d	Number of conservation easements included in (c) acquired	after 8/17/06, and not on a historic structure	е			
	listed in the National Register		2d			
3	Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax					
	year ▶					
4	Number of states where property subject to conservation ea	asement is located				
5	Does the organization have a written policy regarding the pe	eriodic monitoring, inspection, handling of				
	violations, and enforcement of the conservation easements	ıt holds?		└── Yes └── No		
6	Staff and volunteer hours devoted to monitoring, inspecting	, and enforcing conservation easements dur	ing the yea	ar >		
7	Amount of expenses incurred in monitoring, inspecting, and	enforcing conservation easements during the	ne year ►	\$		
8	Does each conservation easement reported on line 2(d) about	eve satisfy the requirements of section 170(h)(4)(B)(ı)			
	and section 170(h)(4)(B)(ii)?			└── Yes		
9	In Part XIV, describe how the organization reports conserva	tion easements in its revenue and expense s	statement,	and balance sheet, and		
	include, if applicable, the text of the footnote to the organization	ation's financial statements that describes th	ie organiza	tion's accounting for		
	conservation easements.		<u> </u>			
Pai	t III Organizations Maintaining Collections		ner Simil	iar Assets.		
	Complete if the organization answered "Yes" to Form					
1a	If the organization elected, as permitted under SFAS 116 (A	•				
	historical treasures, or other similar assets held for public ex	khibition, education, or research in furtherand	ce of public	service, provide, in Part XIV,		
	the text of the footnote to its financial statements that desc	nbes these items.				
b	If the organization elected, as permitted under SFAS 116 (A	SC 958), to report in its revenue statement a	and balance	e sheet works of art, historical		
	treasures, or other similar assets held for public exhibition, e	education, or research in furtherance of publ	ic 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 tre	easures, or other similar assets for financial (gain, provid	de		
	the following amounts required to be reported under SFAS	116 (ASC 958) relating to these items:				
а	Revenues included in Form 990, Part VIII, line 1		>	\$ \$		
b	Assets included in Form 990, Part X		>	\$		

										_
		al Planning Ass						-15214		Page 2
	t III Organizations Maintaining C									
3	Using the organization's acquisition, accessi	on, and other record	is, checi	k any of the	following the	at are a s	significant us	e of its	collection	items
	(check all that apply):		. —							
a	Public exhibition	d			hange progr	ams				
b	Scholarly research	е	لسا	Other						
C	Preservation for future generations							_		
4	Provide a description of the organization's co	•		•	•			e in Par	t XIV.	
5	During the year, did the organization solicit of					ier simila	ır assets		٦.,	□
D	to be sold to raise funds rather than to be m								J Yes	<u> </u>
Pai	t IV Escrow and Custodial Arran		ete if the	organizatio	n answered	"Yes" to	Form 990, I	art IV, I	ine 9, or	
	reported an amount on Form 990, Pa									
1a	Is the organization an agent, trustee, custod	an or other intermed	diary for	contribution	ns or other as	ssets no	t included		٦.,	┌
	on Form 990, Part X?								J Yes	∟ No
b	If "Yes," explain the arrangement in Part XIV	and complete the fo	llowing	table:			<u> </u>			
	_								Amount	
	Beginning balance						1c			
	Additions during the year						1d			
_	Distributions during the year						1e			
f	Ending balance						1f		T.,	
	Did the organization include an amount on F		21?					L.	」Yes	L No
Pai	t V Endowment Funds. Complete i			WVU4- C-	000 Dt	1) / 1	10		.	
r ai	Lidowine it Fullus. Complete						(d) Three year	re back	(a) Four	ears back
4_	Demonstration of the state of t	(a) Current year	(D) P	nor year	(C) TWO yea	IS DACK	(a) Tillee yea	IIS DACK	(e) Four y	rears back
18	Beginning of year balance									
D	Contributions						'			
	Net investment earnings, gains, and losses									
	Grants or scholarships									
е	Other expenditures for facilities									1
	and programs				-					
	Administrative expenses									·
g	End of year balance				<u> </u>					
	2 Provide the estimated percentage of the year end balance held as:									
	Board designated or quasi-endowment	%	_%							
	Permanent endowment	% %								
		. •	ation the	at ara bald a	and administr	arad far	the ergoniza	tion		
Sa	Are there endowment funds not in the posse	ission of the organiz	ation the	at are rielu a	ina aamimiste	ereu ior	urie organiza	TIOTI	- 5	res No
	by:								_	res No
	(i) unrelated organizations								3a(i)	
_	(ii) related organizations		- Caba	dula Da					3a(ii)	
D 4	If "Yes" to 3a(ii), are the related organization:								3b	
Par	Describe in Part XIV the intended uses of the tVI Land, Buildings, and Equipm								_	
	Description of investment	(a) Cost or o			or other	/a) A	ccumulated	$\overline{}$	(d) Book	value
	Description of investment	basis (investr		• •	or other (other)		occumulated preciation		(u) BOOK	value
10	Land	24310 (11140311		54013	\			+		
	Land							+-		
D	Buildings			-	81 889		74 2	30		7 659

2,783,014

Schedule D (Form 990) 2010

311,837.

319,496.

2,471,177

d Equipment

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c))

e Other

Part VII Investments - Other Securities.	See Form 990, Part X, III	ne 12		<u> </u>
(a) Description of security or category	(b) Book value		(c) Method of valua	
(including name of security)	(2, 500), value	Cos	st or end-of-year mar	ket value
(1) Financial derivatives				
(2) Closely-held equity interests				
(3) Other				
(A)				
(B)				
(C)				
(D)				
(E)				
(F)				
(G)				
(H)				
(I)				•
Total. (Col (b) must equal Form 990, Part X, col (B) line 12.)				
Part VIII Investments - Program Related.		line 13.		
	i -	10.	(c) Method of valua	tion:
(a) Description of investment type	(b) Book value	Cos	st or end-of-year mar	
(1)				
(2)				
(3)	-			
(4)	<u> </u>			
(5)				
(6)	 			
(7)				
(8)	- 			
(9)				
(10)	<u> </u>		···· - · · · · · · · · · · · · · · · ·	
Total. (Col (b) must equal Form 990, Part X, col (B) line 13.) Part IX Other Assets. See Form 990, Part X, lin			•	
	a) Description			(b) Book value
	a) Description			(b) Book value
<u>(1)</u>				
(2)				
(3)		 		
(4)				
(5)				
(6)				
	· · · · · · · · · · · · · · · · · · ·			
(8)				
(9)				
(10)				
Total. (Column (b) must equal Form 990, Part X, col (B) I	ine 15.)	·	<u> </u>	
Part X Other Liabilities. See Form 990, Part	X, line 25.		Г	
1. (a) Description of liability		(b) Amount		
(1) Federal income taxes				
(2) Deferred rent		31,203.		
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
(10)				
(11)				
Total. (Column (b) must equal Form 990, Part X, col (B)	line 25.)	31,203.		
2. FIN 48 (ASC 740) FOOthote in Part XIV, provide the text of the foothot	e to the organization's tinancia	statements that reports the organ	ization's liability for uncerta	in tax positions under
032053 12-20-10				edule D (Form 990) 2010
IE 20 10			20	

		(Form 990) 2010 The Financial Planning Association						21488	Page 4
Par	t XI	Reconciliation of Change in Net Assets from Form 990 to	Audit	ed Financ	cial S	Statem	ent	S	
1	Total r	evenue (Form 990, Part VIII, column (A), line 12)			1				
2	Total e	expenses (Form 990, Part IX, column (A), line 25)			2				
3	Exces	s or (deficit) for the year. Subtract line 2 from line 1			3_				
4	Net ur	realized gains (losses) on investments			4				
5	Donate	ed services and use of facilities		-	5				
6	Invest	ment expenses			6				
7	Pnor p	period adjustments		1	7				
8	Other	(Describe in Part XIV.)			- 8				
9		adjustments (net). Add lines 4 through 8			9				
10		s or (deficit) for the year per audited financial statements. Combine lines 3 and		idh Daves	10	or Doi			
		Reconciliation of Revenue per Audited Financial Statemer	its w	ith Rever	iue p				
1		evenue, gains, and other support per audited financial statements				_	1		
2		nts included on line 1 but not on Form 990, Part VIII, line 12:					i		
		nrealized gains on investments	2a						
þ		ed services and use of facilities	2b						
		reries of prior year grants	2c						
ď		(Describe in Part XIV.)	2d				_		
_		nes 2a through 2d					2e		
3		act line 2e from line 1				-	3		
4		nts included on Form 990, Part VIII, line 12, but not on line 1	امدا				l		
а		ment expenses not included on Form 990, Part VIII, line 7b	4a				- 1		
b		(Describe in Part XIV.)	4b						
		nes 4a and 4b revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		•		⊢	4c 5		
5 Par	† XIII	Reconciliation of Expenses per Audited Financial Stateme	nts V	Vith Expe	nses			rn	
1		expenses and losses per audited financial statements				1	1		
2		nts included on line 1 but not on Form 990, Part IX, line 25:							
a		ed services and use of facilities	2a						
		rear adjustments	2b				ĺ		
C	-	losses	2c						
	-	(Describe in Part XIV.)	2d						
		nes 2a through 2d					2e		
3		act line 2e from line 1				_	3		
4		nts included on Form 990, Part IX, line 25, but not on line 1:				<u> </u>			
a		ment expenses not included on Form 990, Part VIII, line 7b	4a			İ			
h		(Describe in Part XIV.)	4b						
		nes 4a and 4b					4c		
		expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18)				_	5		
		Supplemental Information							
K, line	e 2; Pa	ils part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, tXI, line 8; Part XII, lines 2d and 4b. Also compliance 2, FIN 48 Footnote (from consolidated financial statements)	ete this	part to pro					ne 4; Part
The	Assoc	iation, National Financial Planning Support Center, and Fi	nancia	al					
Serv	ices	Information Company adopted the Accounting for Uncertainty	in						
Inco	me Ta	xes accounting standard which requires each of the entities	s to						
dete	rmine	whether a tax position (and the related tax benefit) is mo	ore						
like	ly th	an not to be sustained upon examination by the applicable	taxin	g					
auth	ority	, based solely on the technical merits of the position. The	he			Sc	ched	ule D (Form	990) 2010

Schedule D (Form 990) 2010 The Financial Planning Association	84-1521488	_Page 5
Part XIV Supplemental Information (continued)		
Association, Center and FSIC believe they have appropriate support for any		
tax positions taken, and as such, do not have any uncertain tax positions		
that are significant to the financial statements. The Association's and		
Center's Returns of Organization Exempt from Income Tax (Forms 990); the		
Association's Exempt Organization Business Income Tax Return (Form 990-T);		
and FSIC's U.S. Corporate Income Tax Return (Form 1120) for the previous		
three years are subject to examination by the IRS, generally for three		
years after initial filing.		
		

SCHEDULE J (Form 990)

Department of the Treasury

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees
Complete if the organization answered "Yes" to Form 990,

Part IV, line 23.

Open to Public

Inspection

OMB No 1545-0047

Internal Revenue Service Name of the organization ► Attach to Form 990. ► See separate instructions.

The Financial Planning Association

Employer identification number 84-1521488

Pa	rt 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 Housing allowance or residence for personal use			
	Travel for companions Payments for business use of personal residence			
	Tax indemnification and gross-up payments Health or social club dues or initiation fees			
	Discretionary spending account Personal services (e.g., maid, chauffeur, chef)			
b	If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or			
	reimbursement or provision of all of 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.			
	X Compensation committee X Written employment contract			
	Independent compensation consultant X Compensation survey or study			
	Form 990 of other organizations X 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:			
а	Receive a severance payment or change-of-control payment from the organization or a related organization?	4a		X
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b		Х
С	Participate in, or receive payment from, an equity-based compensation arrangement?	4c		х
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.			
	Only section 501(c)(3) and 501(c)(4) organizations 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:			
а	The organization?	5a		
b	Any related organization?	5b		
	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:			ļ
а	The organization?	6a		
b	Any related organization?	6b		
	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		
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 Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	8		
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in			
	Regulations section 53 4958-6(c)?	9	I	1

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2010

84-1521488

Part II. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

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.

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

		(B) Breakdown of W	W-2 and/or 1099-MISC compensation	C compensation	9	Q	(E)	(F)
					Retirement and	Nontaxable	Total of columns	Compensation
(A) Name		(i) Base compensation	(ii) Bonus & incentive	(iii) Other reportable compensation	other deferred compensation	benefits	(B)(i)-(D)	reported in prior Form 990 or
								Form 990-EZ
	=	209,675.	0	0.	8,248.	12,946.	230,869.	0.
1 Marvin Tuttle, Jr.	: (3)		0	0	0	0	5,376.	0.
	≘	17	0	0	8,241.	10,714.	158,065.	0
2 Curtis Niepoth	E	28,150.	0	0	0	0	28,150.	0
	Ξ	140,937.	0	0	8,248.	7,622.	156,807.	0.
3 Lauren Schadle	E	6,595.	0	0	0.	0	6,595.	0
	(3)	132,999.	0	0	8,248.	15,074.	156,321.	0.
4 Daniel Barry	E	0	0	0	0.	0	0.	0.
	(3)							
ro.	≘							
	Ξ							
9	≘							
	(3)							
7	(ii)							
	(i)							
8	(ii)							
	(i)							
6	(ii)							
	(i)							
10	(ii)							
	(i)							
11	≘							
	Ξ							
12	(ii)							
	Ξ							
13	≘				:			
	Ξ							
14	▣							
	Ξ							
15	≘							
	Ξ							
16	≘							

Schedule J (Form 990) 2010

SCHEDULE O (Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

Department of the Treasury Internal Revenue Service Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2010
Opento Public Inspection

The Financial Planning Association	84-1521488
Form 990, Part III, Line 4a, Program Service Accomplishments:	
connected throughout the conference experience, with a focus on the	
value of FPA and the community with the association and profession.	
Attendees were "very satisfied" with their experience.	
Form 990, Part III, Line 4b, Program Service Accomplishments:	
advantage of their member benefits.	
Form 990, Part VI, Section A, line 6: The Financial Planning Association	
is a membership organization.	· · · · · · · · · · · · · · · · · · ·
Form 990, Part VI, Section B, line 11: The Board receives a copy of the	
Form 990 electronically prior to the return's filing. A comment period is	
allowed before the return is filed.	
Form 990, Part VI, Section B, Line 12c: On an annual basis, FPA Leaders	
(directors, officers, committee chairs, members of committees with board	<u></u>
delegated powers) are required to disclose any conflicts of interest	
(actual, apparent or potential) and agree to comply with FPA's Conflicts of	
Interest Policy. Upon disclosure of a potential conflict of interest and	
all material facts to the Executive Committee, and after any discussion	
with the interested person, the Executive Committee members shall discuss	
and decide if a conflict of interest exists. After exercising due	
diligence, the Executive Committee shall determine whether or not a	
conflict of interest is present. As part of that determination, the	
Executive Committee will decide whether the transaction or arrangement is	

Name of the organization	Employer identification number
The Financial Planning Association	84-1521488
in FPA's best interest, for FPA's benefit, and whether it is fair and	
reasonable to FPA.	
Form 990, Part VI, Section B, Line 15: The CEO's salary is determined	
through the American Research Company's National Compensation Study and	
then reviewed and approved by the Executive Committee. Other key	
employee's salaries are determined by ASAE guidelines and surveys and	
reviewed and approved by the CEO.	
Form 990, Part VI, Section C, Line 19: The governing documents are	
available to the public via the website	
www.fpanet.org/aboutfpa/organization/governingdocuments.	
Form 990, Part XI, line 5, Changes in Net Assets:	
Net unrealized gains on investments: 372,479.	
There were no changes in the oversight process or selection process	
during the tax year.	
	. ————————————————————————————————————
	· · · · · · · · · · · · · · · · · · ·

Department of the Treasury Internal Revenue Service SCHEDULE R (Form 990)

Name of the organization

Related Organizations and Unrelated Partnerships

Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37. ► See separate instructions. ► Attach to Form 990.

2010 Open to Public

OMB No 1545-0047

Employer identification number

Inspection

Schedule R (Form 990) 2010 (g) Section 512(b)(13) Ŷ × controlled entity? Direct controlling Yes entity Identification of Related Tax-Exempt Organizations (Complete of the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.) 84-1521488 Direct controlling entity Ssociation inancial. lanning End-of-year assets status (if section Public chanty 501(c)(3)) 70(b)(1) (A)(vi) Total income Exempt Code চ 501 (c) (3) section Identification of Disregarded Entities (Complete if the organization answered "Yes" to Form 990, Part IV, line 33.) Legal domicile (state or Legal domicile (state or foreign country) foreign country) Colorado Primary activity Primary activity Coordinate pro bono inancial planning The Financial Planning Association For Paperwork Reduction Act Notice, see the Instructions for Form 990. 7535 E. Hampden Ave. Suite 600, National Financial Planning Support Center Name, address, and EIN Name, address, and EIN of related organization of disregarded entity 80231 74-2341001, ပ္ပ Part II Denver, Part

Page 2

84-1521488

Schedule R (Form 990) 2010 The Financial Planning Association

Identification of Related Organizations Taxable as a Partnership (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.) Part III

(j) (k) General or Percentage managing ownership partner?	_			or more related	(h) of Percentage ear ownership	814,664. 100.00%		_	
Code V-UBI Ge amount in box ma 20 of Schedule Pr K-1 (Form 1065) Ve				ause it had one	(g) Share of end-of-year assets		 		
(h) Disproportion- Cate allocations? Yes No K-1				. IV, line 34 beca	(f) Share of total income	2,071,094.			
(g) Share of cend-of-year assets				to Form 990, Par	(e) Type of entity (C corp, S corp, or trust)	C CORP			
(f) Share of total income				on answered "Yes"	(d) Direct controlling entity				
(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)				blete if the organization	(c) Legal domicile (state or foreign country)	GA		-	
(d) Direct controlling Featify				ration or Trust (Compear.)	(b) Primary activity	ublication			
(c) Legal domicile (state or foreign				as a Corpor		75458 P			
(b) Primary activity		-		anizations Taxable a	7	Company - 58-1675458			
(a) Name, address, and EIN of related organization				Part IV Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)	(a) Name, address, and EIN of related organization	Financial Services Information 7535 E, Hampden Ave. Suite 600 Denver, CO 80231			

Schedule R (Form 990) 2010

Part V Transactions With Related Organizations (Complete if the organization answered "Yes" to Form 990, Part IV, line 34, 35, 35a, or 36)

ote. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.		Yes	Ŷ
Dunng the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			_
a Receipt of (i) interest (iii) annuities (iii) royalties or (iv) rent from a controlled entity	<u>1</u>		×
b Gift, grant, or capital contribution to other organization(s)	1b		×
c Gift, grant, or capital contribution from other organization(s)	10		×
d Loans or loan quarantees to or for other organization(s)	1d		×
e Loans or loan quarantees by other organization(s)	1e		×
		-	
f Sale of assets to other organization(s)	11		×
g Purchase of assets from other organization(s)	19		×
h Exchange of assets	1 h		×
i Lease of facilities, equipment, or other assets to other organization(s)	11		X
j Lease of facilities, equipment, or other assets from other organization(s)	1j		×
ther organization(s)	1 k		×
l Performance of services or membership or fundraising solicitations by other organization(s)	=		×

_		
	elationships and transaction thresholds.	10
	ine, including covered	(3)
	in who must complete this li	(4)
r Other transfer of cash or property from other organization(s)	is "Yes," see the instructions for information of	

q Other transfer of cash or property to other organization(s)

p Reimbursement paid by other organization for expenses o Reimbursement paid to other organization for expenses

× Ξ

k Performance of services or membership or fundraising solicitations for other organization(s) I Performance of services or membership or fundraising solicitations by other organization(s)

m Shanng of facilities, equipment, mailing lists, or other assets

n Sharing of paid employees

두

9

4

19

÷

(a) Name of other organization	(b) Transaction type (a-r)	(c) Amount involved	(d) Method of determining amount involved
(1) National Financial Planning Support Center	ů.	109,151.	109,151.Cash transferred
(2) National Financial Planning Support Center	Z	86,605.	86,605.Cash transferred
(3) Financial Services Information Company	×	313,417.	313,417.Cash transferred
(4) Financial Services Information Company	z	565,664.	565,664.Cash transferred
(5) Financial Services Information Company	<u>α</u>	1,090,121.	1,090,121.Cash transferred
(6)			

Schedule R (Form 990) 2010 The Financial Planning Association

Part VI Unrelated Organizations Taxable as a Partnership (Complete if the organization answered "Yes" to Form 990, Part IV, line 37.)

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a)	(q)	(0)	9	(e)	9	(b)	Ξ
NE page souther smeN	Primary activity	alicite	Are all partners	Share of end-of-		Code V-UBI	
of entity			section 501(c)(3) organizations?	year assets	tionate allocations?	amount in box 20	managing partner?
			Yes No			(Form 1065)	1 · 1
			-				

Schedule R (Form 990) 2010

Consent to Apportionment Plan by Controlled Group Members

Statement Attached to and Made a Part of the Income Tax Return for the Year Ended May 31, 2011

Apportionment Plan for the Tax Year That Includes May 31, 2011

Pursuant to regulations issued under IRC Sections 38, 179, and 1561, the component members of the controlled group listed below consent to the following apportionment plan.

Name	Graduated	Alternative		General
Address	Tax Rate	Minimum Tax	Section 179	Business
ID No.	Structure	Exemption	Deduction	Credit Limit
Financial Planning Association	15%-100%	100%	100%	100%
7535 E. Hampden Ave.	25%-100%			
Denver, CO 80231	34%-100%			
84-1521488				
National Financial	15%-0%	0%	0%	0%
Planning Support	25%-0%			
Center	34%-0%			
7535 E. Hampden Ave.				
Denver, CO 80231				
74-2341001				
	150/ 00/	00/	0%	00/
Financial Services	15%-0%	0%	0%	0%
Information Company	25%-0%			
7535 E. Hampden Ave.	34%-0%			
Denver, CO 80231				
58-1675458				

Signature of Authorized Persons:
Signature.
Title: CFO
Financial Planning Association
Signature: Ma Will
Title: President and CEO
National Financial Planning Support Center
Signature: / MM W WIR
Title: President and CEO

Financial Services Information Company

Form **8868**

(Rev. January 2011) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

► File a separate application for each return.

• If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box

OMB No. 1545-1709

X

If you	are filing for an Additional (Not Automatic) 3-Month Ex	tension, c	complete only Part II (on page 2 of this	form).				
Do not	complete Part II unless you have already been granted a	ın automa	itic 3-month extension on a previously fi	led Fo	m 8868.			
Electro	nic filing (e-file). You can electronically file Form 8868 if y	ou need a	a 3-month automatic extension of time t	o file (6	months for a corp	oration		
require	t to file Form 990-T), or an additional (not automatic) 3-moi	nth extens	sion of time. You can electronically file F	orm 8	368 to request an e	xtension		
of time	to file any of the forms listed in Part I or Part II with the exc	ception of	Form 8870, Information Return for Tran	sfers /	Associated With Ce	ertain		
Person	al Benefit Contracts, which must be sent to the IRS in pap	er format	(see instructions). For more details on ti	he elec	tronic filing of this	form,		
visit wu	w irs gov/efile and click on e-file for Charities & Nonprofits							
Part			ibmit original (no copies needed).					
A corpo	ration required to file Form 990-T and requesting an autor	natic 6-mo	onth extension - check this box and con	plete				
Part I o	nly				•	. 🔲		
	r corporations (including 1120-C filers), partnerships, REM come tax returns	ICs, and t	rusts must use Form 7004 to request ar	exten	sion of time			
Type or	Name of exempt organization			Emp	loyer identification	number		
print								
	The Financial Planning Association 84-1521488							
File by the due date t filing your	Ate for Number, street, and room or suite no. If a P.O. box, see instructions. 7535 E. Hampden Ave. No. 600							
return Se instruction	m See							
	Denver, CO 80231							
			· · · · · · · · · · · · · · · · · · ·		· <u>-</u>			
Enter th	e Return code for the return that this application is for (file	a separa	te application for each return)			0 1		
Applica	ation	Return	Application	_		Return		
Is For		Code	Is For			Code		
Form 9	an	01	Form 990-T (corporation)			07		
Form 9		02	Form 1041-A			08		
Form 9	·	03	Form 4720			09		
Form 9		04	Form 5227		—	10		
	90-7 (sec. 401(a) or 408(a) trust)	05	Form 6069			11		
		06	Form 8870		 	12		
ronn 9	90-T (trust other than above) Curtis Niepoth	1 00	FOIII 8070			1 12		
• The	books are in the care of > 7535 E. Hampden Ave.,	No. 600	- Denver CO 80231					
	phone No. ➤ 303-759-4900	110. 000	FAX No. > 303-759-0749					
		Ala - I Iu						
	e organization does not have an office or place of business							
	s is for a Group Return, enter the organization's four digit	1	· · · · · · · · · · · · · · · · · · ·					
box >					ers the extension is	5 101.		
1	request an automatic 3-month (6 months for a corporation				77 4			
-		t organiza	ition return for the organization named a	ibove.	The extension			
18	for the organization's return for:							
	calendar year or X tax year beginning JUN 1, 2010		Why 21 2011					
	tax year beginning JUN 1, 2010	, an	nd ending MAY 31, 2011		- ·			
2 !1	the tax year entered in line 1 is for less than 12 months, c	heck reas	on: Initial return Fina	al retur	n			
3a II	this application is for Form 990-BL, 990-PF, 990-T, 4720,	or 6069. e	enter the tentative tax, less any					
	onrefundable credits. See instructions.		and the territorial territoria	За	\$	0.		
-	this application is for Form 990-PF, 990-T, 4720, or 6069,	enter any	refundable credits and		Ť			
	stimated tax payments made. Include any prior year over	-	•	3b	\$	0.		
_	alance due. Subtract line 3b from line 3a. Include your pa				-			
	v using EFTPS (Electronic Federal Tax Payment System).			3c	\$	0.		

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.