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Form **990-EZ**

# Short Form 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)

- Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions). All other organizations with gross receipts less than \$200,000 and total assets less than \$500,000 at the end of the year may use this form.

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

OMB No 1545-1150

**2011**Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

**A For the 2011 calendar year, or tax year beginning**, 2011, and ending

**B** Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Terminated ☐ Amended return ☐ Application pending

**C Name of organization**  
SUSAN'S LEGACY  
Number and street (or P O box, if mail is not delivered to street address) Room/suite  
~~6721 ACADEMY ROAD NE~~ 11005 Spain NE A  
City or town, state or country, and ZIP + 4 89111 NM ~~87109~~

**D Employer identification number**  
85-0462276

**E Telephone number**  
(505) 843-8450

**F Group Exemption Number** ►

**G Accounting Method:** ☐ Cash ☒ Accrual Other (specify) ►

**H Check** ☐ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

**I Website:** ► N/A

**J Tax-exempt status** (ck only one) — ☒ 501(c)(3) ☐ 501(c) ( ) ◀(insert no.) ☐ 4947(a)(1) or ☐ 527

**K Check** ☐ if the organization is not a section 509(a)(3) supporting organization or a section 527 organization and its gross receipts are normally not more than \$50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions). But if the organization chooses to file a return, be sure to file a complete return.

**L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, line 25, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ** ► \$ 125,657.

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I.)Check if the organization used Schedule O to respond to any question in this Part I ☒

|          |  |  |          |          |
|----------|--|--|----------|----------|
| REVENUE  | 1  | Contributions, gifts, grants, and similar amounts received   | 1        | 102,250. |
|          | 2  | Program service revenue including government fees and contracts  | 2        | 16,061.  |
|          | 3  | Membership dues and assessments  | 3        |          |
|          | 4  | Investment income  | 4        |          |
|          | 5a   | Gross amount from sale of assets other than inventory  | 5a       |          |
|          | b  | Less: cost or other basis and sales expenses   | 5b       |          |
|          | c  | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)  | 5c       |          |
|          | 6  | Gaming and fundraising events  |          |          |
|          | a  | Gross income from gaming (attach Schedule G if greater than \$15,000)  | 6a       |          |
|          | b  | Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000) | 6b       |          |
| c        | Less: direct expenses from gaming and fundraising events   | 6c   |          |          |
| d        | Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c) | 6d   |          |          |
| 7a       | Gross sales of inventory, less returns and allowances  | 7a   |          |          |
| b        | Less: cost of goods sold   | 7b   |          |          |
| c        | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)                     | 7c   |          |          |
| 8        | Other revenue (describe in Schedule O) See Form 990-EZ, Part I, Line 8 Other Revenue               | 8  | 7,346.   |          |
| 9        | <b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8                                      | 9  | 125,657. |          |
| EXPENSES | 10   | Grants and similar amounts paid (list in Schedule O)   | 10       |          |
|          | 11   | Benefits paid to or for members  | 11       |          |
|          | 12   | Salaries, other compensation, and employee benefits  | 12       | 98,754.  |
|          | 13   | Professional fees and other payments to independent contractors  | 13       | 10,977.  |
|          | 14   | Occupancy, rent, utilities, and maintenance  | 14       | 7,946.   |
|          | 15   | Printing, publications, postage, and shipping  | 15       | 48.      |
|          | 16   | Other expenses (describe in Schedule O) See Form 990-EZ, Part I, Line 16 Other Expenses  | 16       | 38,870.  |
|          | 17   | <b>Total expenses.</b> Add lines 10 through 16   | 17       | 156,595. |
| ASSETS   | 18   | Excess or (deficit) for the year (Subtract line 17 from line 9)  | 18       | -30,938. |
|          | 19   | Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)   | 19       | 35,328.  |
|          | 20   | Other changes in net assets or fund balances (explain in Schedule O)   | 20       |          |
|          | 21   | Net assets or fund balances at end of year. Combine lines 18 through 20  | 21       | 4,390.   |

BAA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990-EZ (2011)

SCANNED JAN 08 2013

**Part II Balance Sheets.** (see the instructions for Part II.)Check if the organization used Schedule O to respond to any question in this Part II ☒

|  | (A) Beginning of year | (B) End of year |
|--|-----------------------|-----------------|
| 22 Cash, savings, and investments  | 15,001.               | 22 -5,365.      |
| 23 Land and buildings  | 0.                    | 23 0.           |
| 24 Other assets (describe in Schedule O) See L-24 Stmt                         | 58,765.               | 24 50,968.      |
| 25 Total assets  | 73,766.               | 25 45,603.      |
| 26 Total liabilities (describe in Schedule O) See L-26 Stmt                    | 38,438.               | 26 41,213.      |
| 27 Net assets or fund balances (line 27 of column (B) must agree with line 21) | 35,328.               | 27 4,390.       |

**Part III Statement of Program Service Accomplishments** (see the instrs for Part III.)Check if the organization used Schedule O to respond to any question in this Part III ☒

What is the organization's primary exempt purpose? TO SERVE WOMEN WITH CO-OCCURRING MENTAL AND ADDICTIOVE DISORDERS  
 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

**Expenses**  
 (Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others.)

|   |     |         |
|---|-----|---------|
| 28 SEE ATTACHED   |     |         |
| (Grants \$ 45,000.) If this amount includes foreign grants, check here <input type="checkbox"/> | 28a | 99,747. |
| 29  |     |         |
| (Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>        | 29a |         |
| 30  |     |         |
| (Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>        | 30a |         |
| 31 Other program services (describe in Schedule O) ....   |     |         |
| (Grants \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>        | 31a |         |
| 32 Total program service expenses (add lines 28a through 31a) .....                             | 32  | 99,747. |

**Part IV List of Officers, Directors, Trustees, and Key Employees.** List each one even if not compensated (see the instructions for Part IV.)Check if the organization used Schedule O to respond to any question in this Part IV ☐

| (a) Name and address  | (b) Title and average hours per week devoted to position | (c) Reportable compensation (Form W-2/1099-MISC) (If not paid, enter -0-) | (d) Health benefits, contributions to employee benefit plans, and deferred compensation | (e) Estimated amount of other compensation |
|---|--|---|---|--|
| ANNE ROSE PH.D.<br>11005 SPAIN NE<br>ALBUQUERQUE NM 87111                 | BOARD CHAIRMAN<br>2.00                                   | 0.  | 0.  | 0.   |
| RITA SIEGEL J.D.<br>202 GIRARD SE<br>ALBUQUERQUE NM 87106                 | SECRETARY<br>2.00  | 0.  | 0.  | 0.   |
| JULIANNE LOCKWOOD PH.D.<br>1451 HONEYSUCKLE DR NE<br>ALBUQUERQUE NM 87122 | BOARD MEMBER<br>0.50                                     | 0.  | 0.  | 0.   |
| LESTER BRASHER PH.D.<br>8100 MOUNTAIN RD NE<br>ALBUQUERQUE NM 87110       | BOARD MEMBER<br>0.50                                     | 0.  | 0.  | 0.   |
| ROSALYN M CHAPMAN J.D.<br>PO BOX 612<br>PACIFIC PALISADES CA 90272        | BOARD MEMBER<br>0.50                                     | 0.  | 0.  | 0.   |
| PATRICK MCNERTNEY J.D.<br>11005 SPAIN NE<br>ALBUQUERQUE NM 87111          | BOARD MEMBER<br>0.50                                     | 0.  | 0.  | 0.   |
| JOY EMMONS<br>6565 AMERICA'S PKWY NE<br>ALBUQUERQUE NM 87110              | ACCOUNTANT<br>2.00                                       | 0.  | 0.  | 0.   |
| LINDA FRIEDMAN<br>5106 GRAND AVE NE<br>ALBUQUERQUE NM 87108               | COUNSELOR<br>0.50  | 0.  | 0.  | 0.   |
| LAUREL CARRIER<br>1650 CAMINO DEL VALLE SW<br>ALBUQUERQUE NM 87105        | BOARD MEMBER<br>0.00                                     | 0.  | 0.  | 0.   |
| LEONEL URDENETA M.D.<br>C/O 11005 SPAIN NE<br>ALBUQUERQUE NM 87111        | BOARD MEMBER<br>0.50                                     | 0.  | 0.  | 0.   |

**Part V Other Information** (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V ☐

|  | Yes | No |
|--|-----|----|
| <b>33</b> Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' provide a detailed description of each activity in Schedule O  |     | X  |
| <b>34</b> Were any significant changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)   |     | X  |
| <b>35a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?  |     | X  |
| <b>35b</b> If 'Yes,' to line 35a, has the organization filed a Form 990-T for the year? If 'No,' provide an explanation in Schedule O  |     |    |
| <b>35c</b> Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If 'Yes,' complete Schedule C, Part III  |     | X  |
| <b>36</b> Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N  |     | X  |
| <b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions <b>37a</b> 0.  |     |    |
| <b>37b</b> Did the organization file <b>Form 1120-POL</b> for this year?   |     | X  |
| <b>38a</b> Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?  | X   |    |
| <b>38b</b> If 'Yes,' complete Schedule L, Part II and enter the total amount involved <b>38b</b> 13,800.   |     |    |
| <b>39</b> Section 501(c)(7) organizations. Enter:  |     |    |
| <b>39a</b> Initiation fees and capital contributions included on line 9  |     |    |
| <b>39b</b> Gross receipts, included on line 9, for public use of club facilities   |     |    |
| <b>40a</b> Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under: section 4911 <input type="checkbox"/> ; section 4912 <input type="checkbox"/> ; section 4955 <input type="checkbox"/>  |     |    |
| <b>40b</b> Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I |     | X  |
| <b>40c</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <input type="checkbox"/>  |     |    |
| <b>40d</b> Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization <input type="checkbox"/>   |     |    |
| <b>40e</b> All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T  |     | X  |
| <b>41</b> List the states with which a copy of this return is filed <input type="checkbox"/> <u>North Carolina</u>   |     |    |

**42a** The organization's books are in care of DEBRA CHASE Telephone no. (505) 884-0391  
 Located at 7410 MONTGOMERY BLVD NE, STE 104 ALBUQUERQUE NM ZIP + 4 87109

**42b** 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)? ☐ Yes ☒ No  
 If 'Yes,' enter the name of the foreign country:

See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.

**42c** At any time during the calendar year, did the organization maintain an office outside of the U.S.? ☐ Yes ☒ No  
 If 'Yes,' enter the name of the foreign country:

**43** Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 — Check here ☐ and enter the amount of tax-exempt interest received or accrued during the tax year **43**

|   | Yes | No |
|---|-----|----|
| <b>44a</b> Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ   |     | X  |
| <b>44b</b> Did the organization operate one or more hospital facilities during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ  |     | X  |
| <b>44c</b> Did the organization receive any payments for indoor tanning services during the year?   |     | X  |
| <b>44d</b> If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O  |     |    |
| <b>45a</b> Did the organization have a controlled entity of the organization within the meaning of section 512(b)(13)?  |     | X  |
| <b>45b</b> 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,' Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions) |     | X  |

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I

46

| Yes | No |
|-----|----|
|     | X  |

**Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

47 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

47

| Yes | No |
|-----|----|
|     | X  |

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E

48

| Yes | No |
|-----|----|
|     | X  |

49a Did the organization make any transfers to an exempt non-charitable related organization?

49a

| Yes | No |
|-----|----|
|     | X  |

b If 'Yes,' was the related organization a section 527 organization?

49b

| Yes | No |
|-----|----|
|     |    |

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

| (a) Name and address of each employee paid more than \$100,000 | (b) Title and average hours per week devoted to position | (c) Reportable compensation (Forms W-2/1099-MISC) | (d) Health benefits, contributions to employee benefit plans, and deferred compensation | (e) Estimated amount of other compensation |
|--|--|---|---|--|
| NONE   |  |   |   |  |
|  |  |   |   |  |
|  |  |   |   |  |
|  |  |   |   |  |
|  |  |   |   |  |
|  |  |   |   |  |
|  |  |   |   |  |

e Total number of other employees paid over \$100,000

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

| (a) Name and address of each independent contractor paid more than \$100,000 | (b) Type of service | (c) Compensation |
|--|---------------------|------------------|
| NONE   |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |

e Total number of other independent contractors each receiving over \$100,000

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A

☒ Yes ☐ No

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.

|                               |   |                                   |                 |   |      |
|-------------------------------|---|-----------------------------------|-----------------|---|------|
| <b>Sign Here</b>              | Signature of officer<br><i>Dore Rose, (R)</i>               | Date<br>12/7/12                   |                 |   |      |
|                               | Type or print name and title.                               |                                   |                 |   |      |
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name<br>SHAHIN                        | Preparer's signature<br>S. Shahin | Date<br>12-7-12 | Check <input type="checkbox"/> if self-employed | PTIN |
|                               | Firm's name<br>NEW MEXICO ACCOUNTING SPECIALISTS INC.       |                                   |                 | Firm's EIN<br>74-2836945                        |      |
|                               | Firm's address<br>PO BOX 35727<br>ALBUQUERQUE NM 87176-5727 |                                   |                 | Phone no  |      |
|                               |   |                                   |                 |   |      |

May the IRS discuss this return with the preparer shown above? See instructions

☐ Yes ☐ No

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

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

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

OMB No 1545-0047

**2011**

**Open to Public  
Inspection**

Name of the organization

SUSAN'S LEGACY

Employer identification number

85-0462276

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

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

- 1 ☐ A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☐ Type I      b ☐ Type II      c ☐ Type III — Functionally integrated      d ☐ Type III — Other
- e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f ☐ If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?      **11 g (i)**
- (ii) A family member of a person described in (i) above?      **11 g (ii)**
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?      **11 g (iii)**

|                   | Yes | No |
|-------------------|-----|----|
| <b>11 g (i)</b>   |     |    |
| <b>11 g (ii)</b>  |     |    |
| <b>11 g (iii)</b> |     |    |

**h** Provide the following information about the supported organization(s)

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

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

Schedule A (Form 990 or 990-EZ) 2011

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in) ▶  | (a) 2007 | (b) 2008 | (c) 2009 | (d) 2010 | (e) 2011 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.)  | 164,112. | 159,112. | 159,185. | 138,885. | 102,250. | 723,544.  |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf   |          |          |          |          |          |           |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge   |          |          |          |          |          |           |
| <b>4 Total.</b> Add lines 1 through 3  | 164,112. | 159,112. | 159,185. | 138,885. | 102,250. | 723,544.  |
| <b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) |          |          |          |          |          |           |
| <b>6 Public support.</b> Subtract line 5 from line 4   |          |          |          |          |          | 723,544.  |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ▶   | (a) 2007 | (b) 2008 | (c) 2009 | (d) 2010 | (e) 2011 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| <b>7</b> Amounts from line 4  | 164,112. | 159,112. | 159,185. | 138,885. | 102,250. | 723,544.  |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources   |          |          |          |          |          |           |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on   |          |          |          |          |          |           |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)  |          |          |          |          |          |           |
| <b>11 Total support.</b> Add lines 7 through 10   |          |          |          |          |          | 723,544.  |
| <b>12</b> Gross receipts from related activities, etc (see instructions)  |          |          |          |          | 12       | 5,381.    |
| <b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ▶ <input type="checkbox"/> |          |          |          |          |          |           |

**Section C. Computation of Public Support Percentage**

|   |           |          |
|---|-----------|----------|
| <b>14</b> Public support percentage for 2011 (line 6, column (f) divided by line 11, column (f))  | <b>14</b> | 100.00 % |
| <b>15</b> Public support percentage from 2010 Schedule A, Part II, line 14  | <b>15</b> | %        |
| <b>16a 33-1/3% support test – 2011.</b> If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input checked="" type="checkbox"/>  |           |          |
| <b>b 33-1/3% support test – 2010.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>  |           |          |
| <b>17a 10%-facts-and-circumstances test – 2011.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>    |           |          |
| <b>b 10%-facts-and-circumstances test – 2010.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/> |           |          |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>   |           |          |

BAA

Schedule A (Form 990 or 990-EZ) 2011

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year (or fiscal yr beginning in) ►   | (a) 2007 | (b) 2008 | (c) 2009 | (d) 2010 | (e) 2011 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions and membership fees received. (Do not include any "unusual grants.")  |          |          |          |          |          |           |
| <b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose |          |          |          |          |          |           |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513   |          |          |          |          |          |           |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf  |          |          |          |          |          |           |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge  |          |          |          |          |          |           |
| <b>6 Total.</b> Add lines 1 through 5   |          |          |          |          |          |           |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons  |          |          |          |          |          |           |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year           |          |          |          |          |          |           |
| <b>c</b> Add lines 7a and 7b  |          |          |          |          |          |           |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)  |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal yr beginning in) ►  | (a) 2007 | (b) 2008 | (c) 2009 | (d) 2010 | (e) 2011 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6   |          |          |          |          |          |           |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources  |          |          |          |          |          |           |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975   |          |          |          |          |          |           |
| <b>c</b> Add lines 10a and 10b   |          |          |          |          |          |           |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on  |          |          |          |          |          |           |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)  |          |          |          |          |          |           |
| <b>13 Total support.</b> (Add lns 9, 10c, 11, and 12.)   |          |          |          |          |          |           |
| <b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> <span style="float: right;">► <input type="checkbox"/></span> |          |          |          |          |          |           |

**Section C. Computation of Public Support Percentage**

|  |           |   |
|--|-----------|---|
| <b>15</b> Public support percentage for 2011 (line 8, column (f) divided by line 13, column (f)) | <b>15</b> | % |
| <b>16</b> Public support percentage from 2010 Schedule A, Part III, line 15                      | <b>16</b> | % |

**Section D. Computation of Investment Income Percentage**

|   |           |   |
|---|-----------|---|
| <b>17</b> Investment income percentage for 2011 (line 10c, column (f) divided by line 13, column (f)) | <b>17</b> | % |
| <b>18</b> Investment income percentage from 2010 Schedule A, Part III, line 17                        | <b>18</b> | % |

**19a 33-1/3% support tests – 2011.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ► ☐

**b 33-1/3% support tests – 2010.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ► ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► ☐



**Part IV** **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

[illegible]

**SCHEDULE L**  
**(Form 990 or 990-EZ)**Department of the Treasury  
Internal Revenue Service**Transactions With Interested Persons**

► Complete if the organization answered  
'Yes' on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c,  
or Form 990-EZ, Part V, line 38a or 40b.  
► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No. 1545-0047

**2011****Open to Public  
Inspection**

Name of the organization

SUSAN'S LEGACY

Employer identification number

85-0462276

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

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

| 1   | (a) Name of disqualified person | (b) Description of transaction | (c) Corrected? |    |
|-----|---------------------------------|--------------------------------|----------------|----|
|     |                                 |                                | Yes            | No |
| (1) |                                 |                                |                |    |
| (2) |                                 |                                |                |    |
| (3) |                                 |                                |                |    |
| (4) |                                 |                                |                |    |
| (5) |                                 |                                |                |    |
| (6) |                                 |                                |                |    |

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

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

**Part II Loans to and/or From Interested Persons.**

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

| (a) Name of interested person and purpose | (b) Loan to or from the organization? |      | (c) Original principal amount | (d) Balance due | (e) In default? |    | (f) Approved by board or committee? |    | (g) Written agreement? |    |
|---|---------------------------------------|------|-------------------------------|-----------------|-----------------|----|-------------------------------------|----|------------------------|----|
|   | To                                    | From |                               |                 | Yes             | No | Yes                                 | No | Yes                    | No |
| (1) ANNE ROSE OPERATING EXPENSE           | X                                     |      | 12,000.                       | 13,800.         |                 | X  | X                                   |    | X                      |    |
| (2)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (3)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (4)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (5)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (6)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (7)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (8)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (9)                                       |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (10)                                      |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| Total                                     |                                       |      |                               | 13,800.         |                 |    |                                     |    |                        |    |

**Part III Grants or Assistance Benefiting Interested Persons.**

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

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount and type of assistance |
|-------------------------------|---|-----------------------------------|
| (1)                           |   |                                   |
| (2)                           |   |                                   |
| (3)                           |   |                                   |
| (4)                           |   |                                   |
| (5)                           |   |                                   |
| (6)                           |   |                                   |
| (7)                           |   |                                   |
| (8)                           |   |                                   |
| (9)                           |   |                                   |
| (10)                          |   |                                   |

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

Schedule L (Form 990 or 990-EZ) 2011

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

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sharing of organization's revenues? |    |
|-------------------------------|---|---------------------------|--------------------------------|---|----|
|                               |   |                           |                                | Yes                                     | No |
| (1)                           |   |                           |                                |   |    |
| (2)                           |   |                           |                                |   |    |
| (3)                           |   |                           |                                |   |    |
| (4)                           |   |                           |                                |   |    |
| (5)                           |   |                           |                                |   |    |
| (6)                           |   |                           |                                |   |    |
| (7)                           |   |                           |                                |   |    |
| (8)                           |   |                           |                                |   |    |
| (9)                           |   |                           |                                |   |    |
| (10)                          |   |                           |                                |   |    |

Complete this part to provide additional information for responses to questions on Schedule L (see instructions).

This image shows a blank sheet of white paper with horizontal dashed lines. The lines are evenly spaced and run across the width of the page, providing a guide for handwriting practice. There are no other markings or text on the page.

Department of the Treasury  
Internal Revenue Service

Name of the organization

**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

2011

**Open to Public Inspection**

## SUSAN'S LEGACY

Employer identification number

85-0462276

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

TEEA4901 07/14/11

Schedule O (Form 990 or 990-EZ) 2011

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Part I, Line 8 Other Revenue**

Other revenue (describe in Schedule O)

OTHER INCOME 7,346.

Total 7,346.

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Part I, Line 16 Other Expenses**

Other expenses (describe in Schedule O)

ADVERTISING EXPENSE 1,247.

INSURANCE EXPENSE 6,236.

BANK CHARGES 3,942.

EQUIPMENT 742.

FUNDRAISING EXPENSE 3,203.

LICENSES, FEES, & PERMIT 45.

LS CHILDCARE 464.

LS SUPPLIES 242.

MEALS 54.

PROPERTY RENTALS INSPECTION 129.

RESIDENT BUS PASSES 910.

STAFF MILEAGE 3,781.

STORAGE EXPENSE 1,638.

SUPPLIES EXPENSE 983.

TELEPHONE EXPENSE 3,275.

PAYROLL TAXES EXPENSE 11,915.

OTHER EXPENSE 64.

Total 38,870.

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Page 1, Part II, Line 24**

| Line 24 - Other Assets: | Beginning of Year | End of Year |
|-------------------------|-------------------|-------------|
| GRANT RECEIVABLE        | 58,765.           | 50,968.     |
| Total                   | 58,765.           | 50,968.     |

Schedule O (Form 990 or 990-EZ), Supplemental Information to Form 990 or 990-EZ  
**Form 990-EZ, Page 1, Part II, Line 26**

| Line 26 - Total Liabilities: | Beginning of Year | End of Year |
|------------------------------|-------------------|-------------|
| ACCOUNTS PAYABLE             | 4,815.            | 5,243.      |
| PAYROLL LIABILITIES          | 2,604.            | 2,762.      |
| CURRENT LIABILITIES          | 19,019.           | 19,359.     |
| CRS-1 TAX LIABILITIES        |                   | 49.         |
| LOAN FROM OFFICER            | 12,000.           | 13,800.     |
| Total                        | 38,438.           | 41,213.     |

Additional Information For Tax Return

SUSAN'S LEGACY

85-0462276

Form 990-EZ: Line 28, Description

Susan's Legacy serves women with co-occurring mental and addictive disorders (COD). The services include intensive case management, psycho-education groups, including 12-Step Empowerment Recovery Groups, life skills education, and substance abuse assessment and counseling. The goal of this program is to grow participants' skills, as they become independent, self-supporting, contributing community members. During 2011, Susan's Legacy served a total of 62 clients with these services.

Form 8868 (Rev. 1-2012)

Page 2

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

|   |   |  |
|---|---|--|
| Type or print<br><br>File by the due date for filing your return. See instructions. | Name of exempt organization or other filer, see instructions.<br><br><b>Susan's Legacy</b>                              | Employer identification number (EIN) or<br><br><input checked="" type="checkbox"/> <b>85-0462276</b> |
|   | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>6721 Academy Road NE A</b>                 | Social security number (SSN)<br><input type="checkbox"/>   |
|   | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>Albuquerque NM 87109</b> |  |

Enter the Return code for the return that this application is for (file a separate application for each return)

**01**

| Application Is For                       | Return Code | Application Is For | Return Code |
|--|-------------|--------------------|-------------|
| Form 990                                 | 01          |                    |             |
| Form 990-BL                              | 02          | Form 1041-A        | 08          |
| Form 990-EZ                              | 01          | Form 4720          | 09          |
| Form 990-PF                              | 04          | Form 5227          | 10          |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05          | Form 8069          | 11          |
| Form 990-T (trust other than above)      | 06          | Form 8870          | 12          |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**Debra Chase**  
7410 Montgomery Blvd NE, Ste 104

NM 87109

- The books are in the care of **Albuquerque**  
Telephone No. **505-884-0391**

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **11/15/12**.

5 For calendar year **2011**, or other tax year beginning ☐ , and ending ☐

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return

☐ Change in accounting period

7 State in detail why you need the extension

**Additional time is requested to gather information to prepare a complete and accurate return.**

|   |    |    |
|---|----|----|
| 8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.   | 8a | \$ |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. | 8b | \$ |
| c <b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.  | 8c | \$ |

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☐Title ☐Date ☐

Form 8868 (Rev. 1-2012)