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Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

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

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

OMB No 1545-0047

2012

Open to Public Inspection

A For the 2012 calendar year, or tax year beginning 01-01-2012 , 2012, and ending 12-31-2012

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

C Name of organization
SUSAN B ANTHONY LIST EDUCATION FUND

Doing Business As
CHARLOTTE LOZIER INSTITUTE
LEGAL DEFENSE FUND

Number and street (or P O box if mail is not delivered to street address) | Room/suite
1707 L STREET NW NO 550

City or town, state or country, and ZIP + 4
WASHINGTON, DC 20036

D Employer identification number
26-4788700

E Telephone number
(202) 223-8073

G Gross receipts $ 952,972

F Name and address of principal officer
CHARLES DONOVAN
1707 L STREET NW NO 550
WASHINGTON,DC 20036

H(a) Is this a group return for affiliates? ☐ Yes ☑ No

H(b) Are all affiliates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW LOZIERINSTITUTE ORG

K Form of organization ☐ Corporation ☑ Trust ☐ Association ☐ Other ▶

L Year of formation 2009

M State of legal domicile VA

Part I Summary

1 Briefly describe the organization's mission or most significant activities
THE FUND IS FORMED FOR THE EXPRESS PURPOSE OF RESEARCH AND EDUCATIONAL COMMUNICATIONS ON ABORTION AND THE RIGHT TO LIFE, NON PARTISAN VOTER REGISTRATION, AND THE LEGAL DEFENSE OF FREEDOM SPEECH

2 Check this box ▶☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

Activities & Governance

3	Number of voting members of the governing body (Part VI, line 1a)	**3**	1
4	Number of independent voting members of the governing body (Part VI, line 1b)	**4**	0
5	Total number of individuals employed in calendar year 2012 (Part V, line 2a)	**5**	3
6	Total number of volunteers (estimate if necessary)	**6**	3
7a	Total unrelated business revenue from Part VIII, column (C), line 12	**7a**	0
b	Net unrelated business taxable income from Form 990-T, line 34	**7b**	0

		Prior Year	Current Year
Revenue **8**	Contributions and grants (Part VIII, line 1h)	634,615	952,065
9	Program service revenue (Part VIII, line 2g)	0	0
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	-350	0
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0	907
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	634,265	952,972
Expenses **13**	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	194,779	685,316
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	61,653	226,461
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b	Total fundraising expenses (Part IX, column (D), line 25) ▶59,317		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	203,331	205,499
18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	459,763	1,117,276
19	Revenue less expenses Subtract line 18 from line 12	174,502	-164,304

		Beginning of Current Year	End of Year
Net Assets or Fund Balances **20**	Total assets (Part X, line 16)	202,891	124,365
21	Total liabilities (Part X, line 26)	18,032	122,830
22	Net assets or fund balances Subtract line 21 from line 20	184,859	1,535

Part II 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 Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Sign Here

****** | 2013-07-17
Signature of officer | Date

EMILY BUCHANAN TRUSTEE
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
DEBORAH G KOSNETT				P00290720

Firm's name ▶ TATE AND TRYON | Firm's EIN ▶ 52-1855942

Firm's address ▶ 2021 L STREET NW SUITE 400
WASHINGTON, DC 20036 | Phone no (202) 293-2200

May the IRS discuss this return with the preparer shown above? (see instructions) ☑ Yes ☐ No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III . . . . . ☑

1 Briefly describe the organization's mission

THE FUND IS FORMED FOR THE EXPRESS PURPOSE OF RESEARCH AND EDUCATIONAL COMMUNICATIONS ON ABORTION AND THE RIGHT TO LIFE, NON PARTISAN VOTER REGISTRATION, AND THE LEGAL DEFENSE OF FREEDOM OF SPEECH

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . . ☑ Yes ☐ No

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . . ☐ Yes ☑ No

If "Yes," describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses $ 687,522 including grants of $ 685,316) (Revenue $)

THE FUND CONTINUED TO SUPPORT THE FREE SPEECH PROJECT LAUNCHED IN 2010 THIS PROJECT PROMOTES FREEDOM OF SPEECH ON PRO-LIFE ISSUES DURING 2010 AND 2011, THE FUND DONATED $12,000 AND $194,779 TO A CHARITABLE ORGANIZATION THAT WORKS IN CHALLENGING THE STATE LAWS THAT UNCONSTITUTIONALLY RESTRICT THE FREEDOM OF SPEECH OF PRO-LIFE AND OTHER ISSUE ORGANIZATIONS IN THE PUBLIC SQUARE DURING 2012, THE FUND MADE SIMILAR DONATIONS OF $685,316

4b (Code) (Expenses $ 89,146 including grants of $) (Revenue $)

HUMAN TRAFFICKING PROJECT IN 2012 THE FUND ROLLED OUT ITS FIELD INTERVIEWS AND QUESTIONNAIRES REGARDING THE HEALTH IMPACTS OF SEX TRAFFICKING, ESPECIALLY REPRODUCTIVE HEALTH IMPACTS THIS ORIGINAL RESEARCH WAS CONDUCTED IN NEARLY A DOZEN LOCATIONS ACROSS THE COUNTRY ANALYSIS OF THE DATA BEGAN AND WAS ACCOMPANIED BY REVIEW OF CASE LAW AND OTHER STUDIES RELATED TO THE HEALTH AND WELL-BEING OF TRAFFICKING VICTIMS WORK BEGAN ON DEVELOPING A REPORT ON THE STUDY, BRIEFINGS FOR POLICY MAKERS, AND RECOMMENDATIONS FOR IMPROVEMENTS IN ANTI-TRAFFICKING STRATEGIES AND PUBLIC POLICY TO PROMOTE SWIFTER RESCUE OF VICTIMS AND PREVENTION/REDUCTION OF THE PHYSICAL, PSYCHOLOGICAL AND EMOTIONAL HARMS THEY INCUR

4c (Code) (Expenses $ 46,158 including grants of $) (Revenue $)

PREGNANCY CENTER/ABORTION DATA COLLECTION THE FUND COLLECTS DATA ON THE INCIDENCE OF ABORTION IN THE UNITED STATES, EVALUATES STATE AND FEDERAL POLICIES FOR THE COLLECTION OF SUCH DATA,AND MAKES RECOMMENDATIONS TO INDIVIDUAL RESEARCHERS AND PUBLIC BODIES ON WAYS TO IMPROVE THE COMPLETENESS, TIMELINESS, ACCURACY, AND USEFULNESS OF THESE REPORTS IN FURTHERING MATERNAL AND CHILD HEALTH THE PROJECT INCLUDED ADVISING A NATIONAL PREGNANCY CENTER NETWORK ON PROJECTS DESIGNED TO USE STATE- AND COUNTY-LEVEL DATA TO EVALUATE THE EFFECTIVENESS OF MARKETING AND OTHER COMMUNICATIONS STRATEGIES TO INCREASE PATIENT TRAFFIC TO CARE CENTERS

(Code) (Expenses $ 38,833 including grants of $) (Revenue $)

WEB DEVELOPMENT IN 2012 THE FUND LAUNCHED ITS WEBSITE AT LOZIERINSTITUTE ORG AND BEGAN TO USE IT AS THE PUBLICATION HUB FOR THE CHARLOTTE LOZIER INSTITUTE'S (CLI) REPORTS, BLOGS, FACT SHEETS, COMMENTARIES ON LIFE ISSUES, WITH A FOCUS ON SCIENCE, STATISTICS AND PUBLIC POLICY ANALYSIS CLI PUBLISHED THE WORK OF LEADING ACADEMIC FIGURES, PHYSICIANS AND OTHER ANALYSTS WITH THE ABILITY TO COVER ISSUES IN HEALTH CARE POLICY, STATISTICS, MEDICAL DEVELOPMENTS, ETHICS AND BIO-TECHNOLOGY WITH HUMAN LIFE IMPLICATIONS AN ADVISORY COMMITTEE OF EXPERTS WAS ANNOUNCED AND NEW MEMBERS ARE BEING RECRUITED COVERAGE OF EVERY FIELD RELEVANT TO THE MISSION OF CLI REMAINS THE GOAL AND SUBSTANTIAL PROGRESS WAS MADE IN 2012 TOWARD THE ACHIEVEMENT OF THIS OBJECTIVE

(Code) (Expenses $ 44,307 including grants of $) (Revenue $)

POLLING AND ISSUE RESEARCH THE FUND CONDUCTED FOCUS GROUP AND POLLING RESEARCH IN EARLY 2012 TO EXPLORE PUBLIC PERCEPTION OF LIFE ISSUES RELATED TO CONTRACEPTION, ABORTION, WOMEN'S HEALTH AND PUBLIC FUNDING PRIORITIES THE FUND CONDUCTED AND PUBLISHED POLLING RESEARCH ON PUBLIC ATTITUDES TOWARD THE LEGAL PERMISSIBILITY OF ABORTIONS PERFORMED FOR THE PERSON OF DESTROYING AN UNBORN CHILD OF A PARTICULAR SEX THE FUND ALSO CONDUCTED AND PUBLISHED STUDIES ON STATE ABORTION REPORTING REQUIREMENTS, THE TYPES OF STEM CELL RESEARCH RECEIVING SUPPORT FROM STATE-FINANCED RESEARCH INSTITUTIONS, THE GROWTH OF NEONATAL HOSPICE CENTERS ACROSS THE UNITED STATES, AND THE EFFECTS OF LEGALIZATION OF PHYSICIAN-ASSISTED SUICIDE IN VULNERABLE PATIENT POPULATIONS

(Code) (Expenses $ 24,638 including grants of $) (Revenue $)

OUTREACH AS A NEW RESEARCH AND EDUCATION ORGANIZATION, THE FUND SEEKS TO AVOID DUPLICATION OF WORK BEING DONE BY EXISTING ORGANIZATIONS, TO CREATE COLLABORATIVE RELATIONSHIPS AND PROJECTS WHEREVER POSSIBLE, AND TO DISSEMINATE ITS FINDINGS AND RECOMMENDATIONS TO A BROAD NATIONAL, LOCAL, AND INTERNATIONAL POLICY COMMUNITY ATTENDANCE BY STAFF MEMBERS AT RELEVANT EVENTS ON POLICY ISSUES AND RESEARCH TOPICS IS FUNDAMENTAL TO THE DEVELOPMENT AND RETENTION OF INFORMED PERSONNEL CAPABLE OF UTILIZING RELATED WORK TO ADVANCE THE MISSION OF THE FUND CLI STAFF MEMBERS ATTENDED BRIEFINGS AND EVENTS RELATED TO THE ORGANIZATION'S MISSION IN WASHINGTON, D C , AND LOS ANGELES, CALIFORNIA IN 2012

(Code) (Expenses $ 16,627 including grants of $) (Revenue $)

MEDIA IN 2012, THE FUND PARTICIPATED IN A WIDE VARIETY OF MEDIA INTERVIEWS AND PUBLISHED COMMENTARY ON HEALTH CARE POLICY, SEX SELECTION ABORTION, CONSCIENCE PROTECTION ISSUES, ETHICAL STEM CELL RESEARCH, U S FOREIGN POLICY REGARDING REPRODUCTIVE HEALTH ISSUES, AND RELATED TOPICS ARTICLES WRITTEN BY THE FUND'S STAFF MEMBERS APPEARED IN THE WASHINGTON EXAMINER, THE CATHOLIC THING (ONLINE), THE BLAZE (ONLINE), THE FOUNDRY AND THE CORNER WEBSITES, AND ROLL CALL (PRINT EDITION) CLI PERSONNEL WERE INTERVIEWED IN MANY MEDIA OUTLETS, INCLUDING FOX NEWS, AMERICAN FAMILY RADIO, AND FAMILY NEWS IN FOCUS CLI PERSONNEL AND CLI STUDIES WERE CITED IN POLITICO, THEHILL COM, DESERET NEWS, BUZZFEED COM AND THE WASHINGTON POST, AMONG OTHERS

(Code) (Expenses $ 14,487 including grants of $) (Revenue $)

MEMBERSHIP COMMUNICATIONS CLI MAINTAINS SEVERAL LISTS OF INTERESTED MEMBERS OF THE PUBLIC, INCLUDING DONORS, POLICY ALLIES, MEDIA CONTACTS, AND INTERESTED CITIZENS CLI COMMUNICATES WITH EACH OF THESE CONSTITUENCES THROUGH ITS PARTICIPATION IN A QUARTERLY NEWSLETTER COPUBLISHED WITH SBA LIST, PRINT COPIES OF ITS MAJOR REPORTS, COMMENTARIES, FACT SHEETS, AND EMAIL ALERTS ANNOUNCING THE RELEASE OF NEW PUBLICATIONS AND COMMENTARIES MOST LISTS CURRENTLY NUMBER IN THE HUNDREDS OF ADDRESSEES AND NEARLY ALL OF THESE ARE DOMESTIC U S CONTACTS

(Code) (Expenses $ 11,860 including grants of $) (Revenue $)

END OF LIFE CARE DISRESPECT FOR HUMAN LIFE AND EROSION OF ITS VALUE THROUGH SKEWED PERSONAL MORALITY AND PUBLIC POLICY IS AN INCREASING CONCERN IN AN AGING AND MATERIALISTIC SOCIETY CLI DEVOTED RESOURCES IN 2012 TO ANALYSIS OF THE DANGERS POSED TO HUMAN LIFE BY PHENOMENA LIKE EUTHANASIA, PHYSICIAN-ASSISTED SUICIDE, AND RATIONING OF HEALTH CARE THIS EFFORT INCLUDED POLICY PAPERS, BLOGS, AND OTHER COMMENTARIES PUBLISHED AT LOZIERINSTITUTE ORG AND DISTRIBUTED TO OTHER PUBLICATIONS, MEDIA OUTLETS, SUPPORTERS, AND CITIZEN GROUPS

(Code) (Expenses $ 11,411 including grants of $) (Revenue $)

EXPERT WITNESS PROGRAM ONE OF THE KEY ROLES OF THE LOZIER INSTITUTE IS TO IDENTIFY ACADEMIC AND POLICY EXPERTS WITH SPECIFIC KNOWLEDGE OF RELEVANT RESEARCH AND TO ASSIST THOSE EXPERTS WITH COMMUNICATIONS, FINANCIAL AND LOGISTICAL SUPPORT SO THAT THEY CAN TESTIFY AT PUBLIC HEARINGS BEFORE CITY AND COUNTY OFFICIALS, STATE LEGISLATIVE COMMITTEES AND COMMISSIONS, AND FEDERAL BODIES, INCLUDING CONGRESSIONAL COMMITTEES CLI HAS SUPPORTED EXPERTS TO PROVIDE ORAL AND WRITTEN TESTIMONY ON SUCH TOPICS AS THE IMPACT OF PARENTAL NOTICE LAWS ON THE PERFORMING OF ABORTIONS ON MINOR CHILDREN AND THE DEVELOPMENT OF PERINATAL HOSPICE ENSURING EXPERTISE IS AVAILABLE WHEN AND WHERE IT IS NEEDED IS ESSENTIAL TO PUBLIC EDUCATION ON LIFE ISSUES

(Code) (Expenses $ 1,000 including grants of $) (Revenue $)

SPECIAL PROJECT WRITING IN ADDITION TO ITS OTHER PROGRAM EMPHASES, CLI SUPPORTS INDIVIDUAL AD-HOC WRITING AND RESEARCH PROJECTS ON VARIOUS TOPICS IN BIOETHICS AND SANCTITY OF HUMAN LIFE ISSUES THESE PROJECTS INCLUDE POLICY PAPERS, FACT SHEETS, COMMENTARIES FOR PUBLICATION ON THE CLI WEB SITE OR IN THE GENERAL MEDIA (PRINT OR ELECTRONIC), BLOGS, AND OTHER FORMATS WRITERS ARE DRAWN FROM CLI'S LIST OF EXPERT ADVISORS OR OTHERS WITH SPECIAL SKILLS BUT NO OFFICIAL ROLE WITH CLI

4d Other program services (Describe in Schedule O)

(Expenses $ 163,163 including grants of $) (Revenue $)

4e Total program service expenses ▶ 985,989

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	Yes	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		No
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10		No
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI.*	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b		No
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		No
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		No
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	Yes	
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	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	Yes	
b	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 and XII is optional*	12b	Yes	
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or assistance to any organization or entity located outside the United States? *If "Yes," complete Schedule F, Parts II and IV*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or assistance to individuals located outside the United States? *If "Yes," complete Schedule F, Parts III and IV*	16		No
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I (see instructions)*	17		No
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		No
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		

Part IV Checklist of Required Schedules *(continued)*

21	Did the organization report more than $5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	**21**	Yes	
22	Did the organization report more than $5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	**22**		No
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, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	**23**	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25*	**24a**		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	**24b**		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	**24c**		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	**24d**		
25a	**Section 501(c)(3) and 501(c)(4) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	**25a**		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	**25b**		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highest compensated employee, or disqualified person outstanding as of the end of the organization's tax year? *If "Yes," complete Schedule L, Part II*	**26**		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	**27**		No
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	**28a**		No
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	**28b**		No
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**		No
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	**29**		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	**30**		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	**31**		No
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**		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? *If "Yes," complete Schedule R, Part I*	**33**		No
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	**34**	Yes	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	**35a**		No
b	If 'Yes' to line 35a, 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*	**35b**		
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**	Yes	
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**		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? **Note.** All Form 990 filers are required to complete Schedule O	**38**	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V . . . . . ☐

				Yes	No
1a	Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable . .	1a	6		
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c		Yes	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	3		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	2b		Yes	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year? . . .	3a			No
b	If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O*	3b			
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a			No
b	If "Yes," enter the name of the foreign country ▶ _____ See instructions for filing requirements for Form TD F 90-22 1, Report of Foreign Bank and Financial Accounts				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . .	5a			No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b			No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	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 as charitable contributions? . . .	6a			No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b			
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?	7a			No
b	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			No
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e			
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . .	7f			
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g			
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 organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8			
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the organization make any taxable distributions under section 4966?	9a			
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b			
10	**Section 501(c)(7) organizations.** Enter				
a	Initiation fees and capital contributions included on Part VIII, line 12 . . .	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	**Section 501(c)(12) organizations.** Enter				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	11b			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?	12a			
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** See the instructions for additional information the organization must report on Schedule O	13a			
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	13b			
c	Enter the amount of reserves on hand	13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a			No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O* . .	14b			

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

Check if Schedule O contains a response to any question in this Part VI . . . . . ☑

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	**1a**	1		
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O				
b	Enter the number of voting members included in line 1a, above, who are independent	**1b**	0		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	**2**			No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? .	**3**			No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	**4**			No
5	Did the organization become aware during the year of a significant diversion of the organization's assets? .	**5**			No
6	Did the organization have members or stockholders?	**6**			No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	**7a**		Yes	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	**7b**		Yes	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following				
a	The governing body?	**8a**		Yes	
b	Each committee with authority to act on behalf of the governing body?	**8b**			No
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*	**9**			No

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

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

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed ▶ AL, AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection Indicate how you made these available Check all that apply

☐ Own website ☐ Another's website ☑ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization ▶ JENNIFER GROSS 1707 L STREET NW NO 550 WASHINGTON, DC (202) 223-8073

Part VII 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 . . . . . ☐

Section A. 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
- List all of the organization's **former** officers, key employees, or 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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) EMILY BUCHANAN	1 50	X		X				4,610	119,806	7,281
TRUSTEE, EXEC VP-SBA LIST	38 50									
(2) CHARLES DONOVAN	35 00			X				147,647	21,092	17,874
PRESIDENT	5 00									

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
1b **Sub-Total** ▶										
c **Total from continuation sheets to Part VII, Section A** ▶										
d **Total (add lines 1b and 1c)** ▶								152,257	140,898	25,155

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 1

			Yes	No
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*	**3**		No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	**4**	Yes	
5	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*	**5**		No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 0

Part VIII Statement of Revenue

Check if Schedule O contains a response to any question in this Part VIII . . . . . ☐

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a				
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d				
	e Government grants (contributions)	1e				
	f All other contributions, gifts, grants, and similar amounts not included above	1f 952,065				
	g Noncash contributions included in lines 1a-1f $					
	h **Total.** Add lines 1a-1f		952,065			
Program Service Revenue		Business Code				
	2a					
	b					
	c					
	d					
	e					
	f All other program service revenue					
	g **Total.** Add lines 2a–2f					
	3 Investment income (including dividends, interest, and other similar amounts)					
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
		(i) Real / (ii) Personal				
	6a Gross rents					
	b Less rental expenses					
	c Rental income or (loss)					
	d Net rental income or (loss)					
		(i) Securities / (ii) Other				
	7a Gross amount from sales of assets other than inventory					
	b Less cost or other basis and sales expenses					
	c Gain or (loss)					
	d Net gain or (loss)					
Other Revenue	8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c) See Part IV, line 18	a				
	b Less direct expenses	b				
	c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities See Part IV, line 19	a				
	b Less direct expenses	b				
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less returns and allowances	a				
	b Less cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
	Miscellaneous Revenue	Business Code				
	11a MISCELLANEOUS	900099	907			907
	b					
	c					
	d All other revenue					
	e **Total.** Add lines 11a–11d		907			
	12 **Total revenue.** See Instructions		952,972	0	0	907

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)

Check if Schedule O contains a response to any question in this Part IX . . . . . ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States See Part IV, line 21	685,316	685,316		
2 Grants and other assistance to individuals in the United States See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	166,767	113,042	36,156	17,569
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	45,130	30,831	9,507	4,792
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	2,863	1,781	805	277
10 Payroll taxes	11,701	7,995	2,463	1,243
11 Fees for services (non-employees)				
a Management				
b Legal	605		605	
c Accounting	14,370		14,370	
d Lobbying				
e Professional fundraising services See Part IV, line 17				
f Investment management fees				
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	63,059	60,064		2,995
12 Advertising and promotion	1,997	1,997		
13 Office expenses	12,571	7,193	3,002	2,376
14 Information technology				
15 Royalties . .				
16 Occupancy	7,056	4,822	1,485	749
17 Travel	14,877	8,966	281	5,630
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	397	359		38
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	756		756	
23 Insurance	985		985	
24 Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a WEB EDITOR	27,585	27,585		
b FOCUS GROUPS	24,778	24,778		
c MAILINGS	16,467			16,467
d STATE REGISTRATION FEES	7,181			7,181
e All other expenses	12,815	11,260	1,555	
25 **Total functional expenses.** Add lines 1 through 24e	1,117,276	985,989	71,970	59,317
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response to any question in this Part X . . . . . ☑

				(A) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing		200,074	1	121,306
	2	Savings and temporary cash investments			2	
	3	Pledges and grants receivable, net			3	
	4	Accounts receivable, net			4	
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L			5	
	6	Loans and other 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 employees' beneficiary organizations (see instructions) Complete Part II of Schedule L			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges			9	
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a 4,021			
	b	Less accumulated depreciation	10b 962	2,817	10c	3,059
	11	Investments—publicly traded securities			11	
	12	Investments—other securities See Part IV, line 11			12	
	13	Investments—program-related See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets See Part IV, line 11			15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)		202,891	16	124,365
Liabilities	17	Accounts payable and accrued expenses		0	17	49,445
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D			21	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D		18,032	25	73,385
	26	**Total liabilities.** Add lines 17 through 25		18,032	26	122,830
Net Assets or Fund Balances		**Organizations that follow SFAS 117 (ASC 958), check here ▶ ☑ and complete lines 27 through 29, and lines 33 and 34.**				
	27	Unrestricted net assets		121,845	27	-46,479
	28	Temporarily restricted net assets		63,014	28	48,014
	29	Permanently restricted net assets			29	
		Organizations that do not follow SFAS 117 (ASC 958), check here ▶ ☐ and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds			30	
	31	Paid-in or capital surplus, or land, building or equipment fund			31	
	32	Retained earnings, endowment, accumulated income, or other funds			32	
	33	Total net assets or fund balances		184,859	33	1,535
	34	Total liabilities and net assets/fund balances		202,891	34	124,365

Part XI Reconcilliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI . . . . . ☑

1	Total revenue (must equal Part VIII, column (A), line 12)	1	952,972
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,117,276
3	Revenue less expenses Subtract line 2 from line 1	3	-164,304
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	184,859
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	-101
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-18,919
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	1,535

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII . . . . . ☑

			Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☑ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☑ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		No
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	3b		

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SCHEDULE A (Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

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

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

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SUSAN B ANTHONY LIST EDUCATION FUND

Employer identification number
26-4788700

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

a ☐ Type I **b** ☐ Type II **c** ☐ Type III - Functionally integrated **d** ☐ Type III - Non-functionally integrated

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

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

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

		Yes	No
(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?	**11g(i)**		
(ii) A family member of a person described in (i) above?	**11g(ii)**		
(iii) A 35% controlled entity of a person described in (i) or (ii) above?	**11g(iii)**		

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 col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
Total									

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) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")		60,328	48,430	634,615	952,972	1,696,345
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3		60,328	48,430	634,615	952,972	1,696,345
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						1,089,308
6 **Public support.** Subtract line 5 from line 4						607,037

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4		60,328	48,430	634,615	952,972	1,696,345
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
11 **Total support** (Add lines 7 through 10)						1,696,345

12 Gross receipts from related activities, etc (see instructions) **12**

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and **stop here** . . . . . ▶☑

Section C. Computation of Public Support Percentage

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) **14**

15 Public support percentage for 2011 Schedule A, Part II, line 14 **15**

16a **33 1/3% support test—2012.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶☐

b **33 1/3% support test—2011.** 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 **stop here.** The organization qualifies as a publicly supported organization ▶☐

17a **10%-facts-and-circumstances test—2012.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶☐

b **10%-facts-and-circumstances test—2011.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶☐

Part 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 year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")						
2 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						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
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						
c Add lines 7a and 7b						
8 **Public support** (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13 **Total support.** (Add lines 9, 10c, 11, and 12)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and **stop here** ▶☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f))	15	
16	Public support percentage from 2011 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2012** (line 10c, column (f) divided by line 13, column (f))	17	
18	Investment income percentage from **2011** Schedule A, Part III, line 17	18	

19a **33 1/3% support tests—2012.** 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—2011.** 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).

Facts And Circumstances Test

Explanation

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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, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SUSAN B ANTHONY LIST EDUCATION FUND

Employer identification number
26-4788700

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate contributions to (during year)		
3	Aggregate grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

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

1 Purpose(s) of conservation easements held by the organization (check all that apply)
☐ Preservation of land for public use (e g , recreation or education) ☐ Preservation of an historically important land area
☐ Protection of natural habitat ☐ Preservation of a certified historic structure
☐ Preservation of open space

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

		Held at the End of the Year
a	Total number of conservation easements	2a
b	Total acreage restricted by conservation easements	2b
c	Number of conservation easements on a certified historic structure included in (a)	2c
d	Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure 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 easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

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

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

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

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

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

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

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

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

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

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

b Assets included in Form 990, Part X ▶ $ _____

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

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

- a ☐ Public exhibition
- b ☐ Scholarly research
- c ☐ Preservation for future generations
- d ☐ Loan or exchange programs
- e ☐ Other

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

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

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

		Amount
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII . . . . . ☐

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

- a Board designated or quasi-endowment ▶
- b Permanent endowment ▶
- c Temporarily restricted endowment ▶

The percentages in lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

		Yes	No
(i) unrelated organizations	3a(i)		
(ii) related organizations	3a(ii)		
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b		

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

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment		4,021	962	3,059
e Other				
Total. Add lines 1a through 1e *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ▶				3,059

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
Other		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 12)* ▶		

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. *(Column (b) must equal Form 990, Part X, col (B) line 13)* ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 15.)* . . . . . ▶	

Part X Other Liabilities. See Form 990, Part X, line 25.

1 (a) Description of liability	(b) Book value
Federal income taxes	
DUE TO AFFILIATES	41,385
LOAN FROM AFFILIATE	17,000
LOAN FROM RESTRICTED FUNDS	15,000
Total. *(Column (b) must equal Form 990, Part X, col (B) line 25)* ▶	73,385

2. Fin 48 (ASC 740) Footnote In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☑

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements			1	952,972
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII)	2d			
e	Add lines **2a** through **2d**			2e	0
3	Subtract line **2e** from line **1**			3	952,972
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total revenue Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12)			5	952,972

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements			1	1,117,276
2	Amounts included on line 1 but not on Form 990, Part IX, line 25				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII)	2d			
e	Add lines **2a** through **2d**			2e	0
3	Subtract line **2e** from line **1**			3	1,117,276
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total expenses Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18)			5	1,117,276

Part XIII Supplemental Information

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

Identifier	Return Reference	Explanation
DESCRIPTION OF UNCERTAIN TAX POSITIONS UNDER FIN 48	PART X, LINE 2	WITH FEW EXCEPTIONS, THE FUND IS NO LONGER SUBJECT TO U S FEDERAL, STATE, AND LOCAL INCOME TAX EXAMINATIONS BY TAXING AUTHORITIES FOR YEARS BEFORE 2009 THE FUND BELIEVES THAT IT HAS APPROPRIATE SUPPORT FOR INCOME TAX POSITIONS TAKEN THEREFORE, MANAGEMENT HAS NOT IDENTIFIED ANY UNCERTAIN INCOME TAX POSITIONS GENERALLY, INCOME TAX RETURNS RELATED TO THE FISCAL YEARS ENDED DECEMBER 31, 2009 THROUGH 2012 REMAIN OPEN FOR EXAMINATION BY TAXING AUTHORITIES

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Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SUSAN B ANTHONY LIST EDUCATION FUND

Employer identification number
26-4788700

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . ☑ Yes ☐ No

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

Part II Grants and Other Assistance to Governments and Organizations in the United States.

Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than $5,000. Part II can be duplicated if additional space is needed.

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) JAMES MADISON CENTER FOR FREE SPEECH ONE SOUTH SIXTH STREET TERRE HAUTE,IN 47807	23-7442564	501C3	12,000				LEGAL DEFENSE - CONSTITUTIONAL RIGHTS/FREE SPEECH
(2) ACTRIGHT LEGAL FOUNDATION 209 WEST MAIN STREET PLAINFIELD,IN 46168	45-4355641	501C3	673,316				LEGAL DEFENSE - CONSTITUTIONAL RIGHTS/FREE SPEECH

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . . ▶ 2

3 Enter total number of other organizations listed in the line 1 table . . . . . ▶ 0

Part III **Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance

Part IV **Supplemental Information.**

Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information

Identifier	Return Reference	Explanation
PROCEDURE FOR MONITORING GRANTS IN THE U S	PART I, LINE 2	SCHEDULE I, PART I, LINE 2 THE SUSAN B ANTHONY EDUCATION FUND MONITORS THE USE OF ITS DONATIONS BY MONITORING THE PROGRESS AND STATUS OF THE CIVIL RIGHTS LITIGATION FUNDED BY ITS DONATIONS AND BY REVIEWING THE ATTORNEY RECORDS OF SERVICES PROVIDED

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Schedule J (Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

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

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

▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SUSAN B ANTHONY LIST EDUCATION FUND

Employer identification number
26-4788700

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate 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 idemnification 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 in 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 filing organization used to establish the compensation of the organization's CEO/Executive Director Check all that apply Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III			
	☑ Compensation committee	☑ Written employment contract		
	☐ Independent compensation consultant	☐ Compensation survey or study		
	☑ Form 990 of other organizations	☐ Approval by the board or compensation committee		
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization			
a	Receive a severance payment or change-of-control payment?	**4a**		No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement?	**4c**		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III			
	Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.			
5	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of			
a	The organization?	**5a**		No
b	Any related organization?	**5b**		No
	If "Yes," to line 5a or 5b, describe in Part III			
6	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of			
a	The organization?	**6a**		No
b	Any related organization?	**6b**		No
	If "Yes," to line 6a or 6b, describe in Part III			
7	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		No
8	Were any amounts reported in Form 990, Part VII, paid or accured 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**		No
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	**9**		

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) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported as deferred in prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1)CHARLES DONOVAN PRESIDENT	(i)	147,647	0	0	429	16,373	164,449	0
	(ii)	21,092	0	0	61	2,339	23,492	0

Part III Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II
Also complete this part for any additional information

Identifier	Return Reference	Explanation

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SCHEDULE O (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SUSAN B ANTHONY LIST EDUCATION FUND

Employer identification number
26-4788700

Identifier	Return Reference	Explanation
NEW PROGRAM SERVICES	FORM 990, PART III, LINE 2	IN 2012, THE FUND LAUNCHED NEW PROGRAM SERVICES SUCH AS THE FORMATION OF AN EXPERT ADIVSORY BOARD, ANALYSIS OF SEX SELECTION AND GENDER IMBALANCE ISSUES, AND EVALUATION OF STEM CELL RESEARCH FUNDING PATTERNS ONE OF THE PROGRAMS THAT LAUNCHED IN 2012 WAS THE HUMAN TRAFFICKING PROJECT AFTER CONDUCTING A FEASIBILITY STUDY IN 2011, IN 2012 THE FUND ROLLED OUT ITS FIELD INTERVIEWS AND QUESTIONNAIRES REGARDING THE HEALTH IMPACTS OF SEX TRAFFICKING, ESPECIALLY REPRODUCTIVE HEALTH IMPACTS THIS ORIGINAL RESEARCH WAS CONDUCTED IN NEARLY A DOZEN LOCATIONS ACROSS THE COUNTRY ANALYSIS OF THE DATA BEGAN AND WAS ACCOMPANIED BY REVIEW OF CASE LAW AND OTHER STUDIES RELATED TO THE HEALTH AND WELL-BEING OF TRAFFICKING VICTIMS WORK BEGAN ON DEVELOPING A REPORT ON THE STUDY, BRIEFINGS FOR POLICY MAKERS, AND RECOMMENDATIONS FOR IMPROVEMENTS IN ANTI-TRAFFICKING STRATEGIES AND PUBLIC POLICY TO PROMOTE SWIFTER RESCUE OF VICTIMS AND REDUCTION OF THE PHYSICAL, PSYCHOLOGICAL AND EMOTIONAL HARMS THEY INCUR
	FORM 990, PART VI, SECTION A, LINE 7A	THE BOARD OF DIRECTORS OF THE SUSAN B ANTHONY LIST HAS THE POWER TO REMOVE THE EDUCATION FUND'S TRUSTEE
	FORM 990, PART VI, SECTION A, LINE 7B	THE TRUSTEE MUST ACT IN ACCORDANCE WITH THE RESOLUTIONS OF THE BOARD OF DIRECTORS OF THE SUSAN B ANTHONY LIST, INC
	FORM 990, PART VI, SECTION A, LINE 8B	THE ORGANIZATION DOES NOT HAVE ANY COMMITTEES WITH AUTHORITY TO ACT ON BEHALF OF THE GOVERNING BODY
	FORM 990, PART VI, SECTION B, LINE 11	THE 990 IS PREPARED BY AN INDEPENDENT CPA FIRM AND THEN REVIEWED BY THE ORGANIZATION'S BOOKKEEPER, TRUSTEE, AND PRESIDENT (GOVERNING BODY) BEFORE IT IS FILED THE FORM IS ALSO REVIEWED BY THE ORGANIZATION'S ATTORNEY BEFORE IT IS FINALIZED
	FORM 990, PART VI, SECTION B, LINE 12C	THE FUND'S CONFLICT OF INTEREST POLICY CURRENTLY COVERS ONLY EMPLOYEES ACCORDINGLY, AT PRESENT THERE IS NO REQUIREMENT THAT THE LIST'S OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES DISCLOSE OR UPDATE ANNUALLY INFORMATION REGARDING POTENTIAL CONFLICTS OF INTEREST THE FUND DOES MONITOR AND ENFORCE ITS COI POLICY ON AT LEAST AN ANNUAL BASIS, BY REVIEWING ITS BUSINESS RELATIONSHIPS TO DETERMINE IF THERE ARE ANY POTENTIAL CONFLICTS
	FORM 990, PART VI, SECTION B, LINE 15A	THE PRESIDENT'S SALARY IS SET BY A SALARY REVIEW COMMITTEE THIS COMMITTEE REVIEWS THE PRESIDENT'S SALARY AND DETERMINES IF THE COMPENSATION IS APPROPRIATE GIVEN PERFORMANCE AND THE ORGANIZATION'S OVERALL FINANCIAL HEALTH AS PART OF THIS REVIEW, DATA FOR COMPARABLE POSITIONS AND DUTIES AT SIMILAR ORGANIZATIONS ARE TAKEN INTO ACCOUNT IN THE DECISION PROCESS NO CHANGES WERE MADE IN THE PRESIDENT'S SALARY IN 2012
	FORM 990, PART VI, SECTION C, LINE 19	THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, ITS CONFLICT OF INTEREST POLICY, AND ITS FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST
CHANGES IN NET ASSETS OR FUND BALANCES	FORM 990, PART XI, LINE 9	CASH-TO-ACCRUAL CHANGE IN BEGINNING FUND BALANCE-SEE FORM 3115 -18,919
	FORM 990, PART XII, LINE 1	THE ORGANIZATION SWITCHED FROM THE CASH METHOD OF ACCOUNTING TO THE ACCRUAL METHOD PLEASE SEE ATTACHED FORM 3115
	FORM 990, PART XII, LINE 2C	THE PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR

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SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

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

OMB No 1545-0047

2012

Open to Public Inspection

Name of the organization
SUSAN B ANTHONY LIST EDUCATION FUND

Employer identification number
26-4788700

Part I Identification of Disregarded Entities (Complete if the organization answered "Yes" to Form 990, Part IV, line 33.)

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations (Complete if 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.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	(g) No
(1) SUSAN B ANTHONY LIST INC 1701 L STREET NW SUITE 550 WASHINGTON, DC 20036 54-1850126	TO END ABORTION VIA ACTIVIST TRAINING AND PASSAGE OF LEGISLATION	VA	501(C)(4)				No

Part III **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.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

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	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512 (b)(13) controlled entity?	
								Yes	No

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

		Yes	No
Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule			
1 During the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a Receipt of **(i)** interest **(ii)** annuities **(iii)** royalties or **(iv)** rent from a controlled entity	1a		No
b Gift, grant, or capital contribution to related organization(s)	1b		No
c Gift, grant, or capital contribution from related organization(s)	1c		No
d Loans or loan guarantees to or for related organization(s)	1d		No
e Loans or loan guarantees by related organization(s)	1e	Yes	
f Dividends from related organization(s)	1f		No
g Sale of assets to related organization(s)	1g		No
h Purchase of assets from related organization(s)	1h		No
i Exchange of assets with related organization(s)	1i		No
j Lease of facilities, equipment, or other assets to related organization(s)	1j		No
k Lease of facilities, equipment, or other assets from related organization(s)	1k		No
l Performance of services or membership or fundraising solicitations for related organization(s)	1l		No
m Performance of services or membership or fundraising solicitations by related organization(s)	1m		No
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	Yes	
o Sharing of paid employees with related organization(s)	1o	Yes	
p Reimbursement paid to related organization(s) for expenses	1p		No
q Reimbursement paid by related organization(s) for expenses	1q		No
r Other transfer of cash or property to related organization(s)	1r		No
s Other transfer of cash or property from related organization(s)	1s		No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of other organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) SUSAN B ANTHONY LIST	E	17,000	CASH
(2) SUSAN B ANTHONY LIST	N	37,354	ACTUAL EXPENSE
(3) SUSAN B ANTHONY LIST	P	4,032	ACTUAL EXPENSE

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) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under section 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	

Part VII Supplemental Information

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

Identifier	Return Reference	Explanation

Additional Data

Return to Form

Software ID:
Software Version:
EIN: 26-4788700
Name: SUSAN B ANTHONY LIST EDUCATION FUND

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Form **3115**
(Rev December 2009)
Department of the Treasury
Internal Revenue Service

Application for Change in Accounting Method

OMB No. 1545-0152

Name of filer (name of parent corporation if a consolidated group) (see instructions)

SUSAN B. ANTHONY LIST EDUCATION FUND

Number, street, and room or suite no. If a P.O. box, see the instructions.

1707 L STREET, NW #550

City or town, state, and ZIP code

WASHINGTON, DC 20036

Identification number (see instructions)

26-4788700

Principal business activity code number (see instructions)

900099

Tax year of change begins (MM/DD/YYYY) 01/01/2012

Tax year of change ends (MM/DD/YYYY) 12/31/2012

Name of contact person (see instructions)

EMILY BUCHANAN

Contact person's telephone number

202-223-8073

Name of applicant(s) (if different than filer) and identification number(s) (see instructions)

If the applicant is a member of a consolidated group, check this box . . . . . ▶ ☐

If **Form 2848,** Power of Attorney and Declaration of Representative, is attached (see instructions for when Form 2848 is required), check this box . . . . . ▶ ☐

Check the box to indicate the type of applicant.

- ☐ Individual
- ☐ Corporation
- ☐ Controlled foreign corporation (Sec. 957)
- ☐ 10/50 corporation (Sec 904(d)(2)(E))
- ☐ Qualified personal service corporation (Sec. 448(d)(2))
- ☐ Cooperative (Sec. 1381)
- ☐ Partnership
- ☐ S corporation
- ☐ Insurance co. (Sec. 816(a))
- ☐ Insurance co. (Sec 831)
- ☐ Other (specify) ▶
- ☒ Exempt organization. Enter Code section ▶ 501(C)(3)

Check the appropriate box to indicate the type of accounting method change being requested. (see instructions)

- ☐ Depreciation or Amortization
- ☐ Financial Products and/or Financial Activities of Financial Institutions
- ☒ Other (specify) ▶ CASH TO ACCRUAL OVERALL METHOD CHANGE

Caution. *To be eligible for approval of the requested change in method of accounting, the taxpayer must provide all information that is relevant to the taxpayer or to the taxpayer's requested change in method of accounting. This includes all information requested on this Form 3115 (including its instructions), as well as any other information that is not specifically requested.*

The taxpayer must attach all applicable supplemental statements requested throughout this form.

Part I Information For Automatic Change Request

		Yes	No
1	Enter the applicable designated automatic accounting method change number for the requested automatic change. Enter only one designated automatic accounting method change number, except as provided for in guidance published by the IRS. If the requested change has no designated automatic accounting method change number, check "Other," and provide both a description of the change and citation of the IRS guidance providing the automatic change. See instructions. ▶ (a) Change No. 34 (b) Other ☐ Description ▶		
2	Do any of the scope limitations described in section 4.02 of Rev. Proc. 2008-52 cause automatic consent to be unavailable for the applicant's requested change? If "Yes," attach an explanation.		X

Note. *Complete Part II below and then Part IV, and also Schedules A through E of this form (if applicable).*

Part II Information For All Requests

		Yes	No
3	Did or will the applicant cease to engage in the trade or business to which the requested change relates, or terminate its existence, in the tax year of change (see instructions)? If "Yes," the applicant is not eligible to make the change under automatic change request procedures.		X
4a	Does the applicant (or any present or former consolidated group in which the applicant was a member during the applicable tax year(s)) have any Federal income tax return(s) under examination (see instructions)? If "No," go to line 5.		X
b	Is the method of accounting the applicant is requesting to change an issue (with respect to either the applicant or any present or former consolidated group in which the applicant was a member during the applicable tax year(s)) either (i) under consideration or (ii) placed in suspense (see instructions)?		

Signature *(see instructions)*

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

Filer

Emily Buchanan 7/17/13
Signature and date

Emily Buchanan, Trustee
Name and title (print or type)

Preparer (other than filer/applicant)

Deborah L. Kosnett 7/8/13
Signature of individual preparing the application and date

DEBORAH KOSNETT
Name of individual preparing the application (print or type)

TATE & TRYON
Name of firm preparing the application

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

Part II Information For All Requests (continued)

		Yes	No
4c	Is the method of accounting the applicant is requesting to change an issue pending (with respect to either the applicant or any present or former consolidated group in which the applicant was a member during the applicable tax year(s)) for any tax year under examination (see instructions)?		
d	Is the request to change the method of accounting being filed under the procedures requiring that the operating division director consent to the filing of the request (see instructions)? If "Yes," attach the consent statement from the director.		
e	Is the request to change the method of accounting being filed under the 90-day or 120-day window period? If "Yes," check the box for the applicable window period and attach the required statement (see instructions). ☐ 90 day ☐ 120 day Date examination ended ▶ _____		
f	If you answered "Yes" to line 4a, enter the name and telephone number of the examining agent and the tax year(s) under examination. Name ▶ _____ Telephone number ▶ _____ Tax year(s) ▶ _____		
g	Has a copy of this Form 3115 been provided to the examining agent identified on line 4f?		
5a	Does the applicant (or any present or former consolidated group in which the applicant was a member during the applicable tax year(s)) have any Federal income tax return(s) before Appeals and/or a Federal court? If "Yes," enter the name of the (check the box) ☐ Appeals officer and/or ☐ counsel for the government, telephone number, and the tax year(s) before Appeals and/or a Federal court. Name ▶ _____ Telephone number ▶ _____ Tax year(s) ▶ _____		X
b	Has a copy of this Form 3115 been provided to the Appeals officer and/or counsel for the government identified on line 5a?		
c	Is the method of accounting the applicant is requesting to change an issue under consideration by Appeals and/or a Federal court (for either the applicant or any present or former consolidated group in which the applicant was a member for the tax year(s) the applicant was a member) (see instructions)? If "Yes," attach an explanation.		X
6	If the applicant answered "Yes" to line 4a and/or 5a with respect to any present or former consolidated group, attach a statement that provides each parent corporation's **(a)** name, **(b)** identification number, **(c)** address, and **(d)** tax year(s) during which the applicant was a member that is under examination, before an Appeals office, and/or before a Federal court		
7	If, for federal income tax purposes, the applicant is either an entity (including a limited liability company) treated as a partnership or an S corporation, is it requesting a change from a method of accounting that is an issue under consideration in an examination, before Appeals, or before a Federal court, with respect to a Federal income tax return of a partner, member, or shareholder of that entity? If "Yes," the applicant is **not** eligible to make the change		X
8a	Does the applicable revenue procedure (advance consent or automatic consent) state that the applicant does not receive audit protection for the requested change (see instructions)?		X
b	If "Yes," attach an explanation.		
9a	Has the applicant, its predecessor, or a related party requested or made (under either an automatic change procedure or a procedure requiring advance consent) a change in method of accounting within the past 5 years (including the year of the requested change)?		X
b	If "Yes," for each trade or business, attach a description of each requested change in method of accounting (including the tax year of change) and state whether the applicant received consent		
c	If any application was withdrawn, not perfected, or denied, or if a Consent Agreement granting a change was not signed and returned to the IRS, or the change was not made or not made in the requested year of change, attach an explanation.		
10a	Does the applicant, its predecessor, or a related party currently have pending any request (including any concurrently filed request) for a private letter ruling, change in method of accounting, or technical advice?		X
b	If "Yes," for each request attach a statement providing the name(s) of the taxpayer, identification number(s), the type of request (private letter ruling, change in method of accounting, or technical advice), and the specific issue(s) in the request(s).		
11	Is the applicant requesting to change its **overall** method of accounting? If "Yes," check the appropriate boxes below to indicate the applicant's present and proposed methods of accounting. Also, complete Schedule A on page 4 of this form.	X	

Present method: ☒ Cash ☐ Accrual ☐ Hybrid (attach description)

Proposed method: ☐ Cash ☒ Accrual ☐ Hybrid (attach description)

Part II Information For All Requests (continued)

		Yes	No
12	If the applicant is either (i) **not** changing its overall method of accounting, or (ii) is changing its overall method of accounting and also changing to a special method of accounting for one or more items, attach a detailed and complete description for each of the following		
a	The item(s) being changed		
b	The applicant's present method for the item(s) being changed.		
c	The applicant's proposed method for the item(s) being changed		
d	The applicant's present overall method of accounting (cash, accrual, or hybrid)		
13	Attach a detailed and complete description of the applicant's trade(s) or business(es), and the principal business activity code for each If the applicant has more than one trade or business as defined in Regulations section 1 446-1(d), describe whether each trade or business is accounted for separately; the goods and services provided by each trade or business and any other types of activities engaged in that generate gross income, the overall method of accounting for each trade or business; and which trade or business is requesting to change its accounting method as part of this application or a separate application. SEE STATEMENT 1		
14	Will the proposed method of accounting be used for the applicant's books and records and financial statements? For insurance companies, see the instructions . . . . . If "No," attach an explanation	X	
15a	Has the applicant engaged, or will it engage, in a transaction to which section 381(a) applies (e.g., a reorganization, merger, or liquidation) during the proposed tax year of change determined without regard to any potential closing of the year under section 381(b)(1)?		X
b	If "Yes," for the items of income and expense that are the subject of this application, attach a statement identifying the methods of accounting used by the parties to the section 381(a) transaction immediately before the date of distribution or transfer and the method(s) that would be required by section 381(c)(4) or (c)(5) absent consent to the change(s) requested in this application.		
16	Does the applicant request a conference with the IRS National Office if the IRS proposes an adverse response?		X
17	If the applicant is changing to either the overall cash method, an overall accrual method, or is changing its method of accounting for any property subject to section 263A, any long-term contract subject to section 460, or inventories subject to section 474, enter the applicant's gross receipts for the 3 tax years preceding the tax year of change		

1st preceding year ended mo DEC	yr 2011	2nd preceding year ended mo DEC	yr 2010	3rd preceding year ended mo DEC	yr 2009
$	644,248	$	46,100	$	60,328

Part III Information For Advance Consent Request

		Yes	No
18	Is the applicant's requested change described in any revenue procedure, revenue ruling, notice, regulation, or other published guidance as an automatic change request? . . . . . If "Yes," attach an explanation describing why the applicant is submitting its request under advance consent request procedures.		
19	Attach a full explanation of the legal basis supporting the proposed method for the item being changed. Include a detailed and complete description of the facts that explains how the law specifically applies to the applicant's situation and that demonstrates that the applicant is authorized to use the proposed method. Include all authority (statutes, regulations, published rulings, court cases, etc.) supporting the proposed method. Also, include either a discussion of the contrary authorities or a statement that no contrary authority exists		
20	Attach a copy of all documents related to the proposed change (see instructions)		
21	Attach a statement of the applicant's reasons for the proposed change		
22	If the applicant is a member of a consolidated group for the year of change, do all other members of the consolidated group use the proposed method of accounting for the item being changed? . . . . If "No," attach an explanation.		
23a	Enter the amount of **user fee** attached to this application (see instructions). ▶ $		
b	If the applicant qualifies for a reduced user fee, attach the required information or certification (see instructions)		

Part IV Section 481(a) Adjustment

		Yes	No
24	Does the applicable revenue procedure, revenue ruling, notice, regulation, or other published guidance require the applicant to implement the requested change in method of accounting on a cut-off basis rather than a section 481(a) adjustment? . If "Yes," do not complete lines 25, 26, and 27 below		X
25	Enter the section 481(a) adjustment Indicate whether the adjustment is an increase (+) or a decrease (-) in income ▶ $ (18,919) Attach a summary of the computation and an explanation of the methodology used to determine the section 481(a) adjustment. If it is based on more than one component, show the computation for each component. If more than one applicant is applying for the method change on the same application, attach a list of the name, identification number, principal business activity code (see instructions), and the amount of the section 481(a) adjustment attributable to each applicant STATEMENT 2		

Part IV Section 481(a) Adjustment (continued)

		Yes	No
26	If the section 481(a) adjustment is an increase to income of less than $25,000, does the applicant elect to take the entire amount of the adjustment into account in the year of change?	X	
27	Is any part of the section 481(a) adjustment attributable to transactions between members of an affiliated group, a consolidated group, a controlled group, or other related parties?		X
	If "Yes," attach an explanation		

Schedule A—Change in Overall Method of Accounting (If Schedule A applies, Part I below must be completed.)

Part I Change in Overall Method (see instructions)

1 Enter the following amounts as of the close of the tax year preceding the year of change. If none, state "None" Also, attach a statement providing a breakdown of the amounts entered on lines 1a through 1g.

		Amount
a	Income accrued but not received (such as accounts receivable)	$ NONE
b	Income received or reported before it was earned (such as advanced payments). Attach a description of the income and the legal basis for the proposed method	NONE
c	Expenses accrued but not paid (such as accounts payable)	3,919
d	Prepaid expenses previously deducted	NONE
e	Supplies on hand previously deducted and/or not previously reported	NONE
f	Inventory on hand previously deducted and/or not previously reported. Complete Schedule D, Part II	NONE
g	Other amounts (specify). Attach a description of the item and the legal basis for its inclusion in the calculation of the section 481(a) adjustment ► LOAN FROM RESTRICTED FUNDS	15,000
h	**Net section 481(a) adjustment** (Combine lines 1a–1g.) Indicate whether the adjustment is an increase (+) or decrease (-) in income. Also enter the net amount of this section 481(a) adjustment amount on Part IV, line 25.	$ 18,919

2 Is the applicant also requesting the recurring item exception under section 461(h)(3)? ☐ Yes ☒ No

3 Attach copies of the profit and loss statement (Schedule F (Form 1040) for farmers) and the balance sheet, if applicable, as of the close of the tax year preceding the year of change. Also attach a statement specifying the accounting method used when preparing the balance sheet. If books of account are not kept, attach a copy of the business schedules submitted with the Federal income tax return or other return (e.g., tax-exempt organization returns) for that period. If the amounts in Part I, lines 1a through 1g, do not agree with those shown on both the profit and loss statement and the balance sheet, attach a statement explaining the differences. (SEE STATEMENTS 3 & 4)

Part II Change to the Cash Method For Advance Consent Request (see instructions)

Applicants requesting a change to the cash method must attach the following information:

1 A description of inventory items (items whose production, purchase, or sale is an income-producing factor) and materials and supplies used in carrying out the business.

2 An explanation as to whether the applicant is required to use the accrual method under any section of the Code or regulations

Schedule B—Change to the Deferral Method for Advance Payments (see instructions)

1 If the applicant is requesting to change to the Deferral Method for advance payments described in section 5.02 of Rev. Proc. 2004-34, 2004-1 C B. 991, attach the following information·

a A statement explaining how the advance payments meet the definition in section 4.01 of Rev Proc. 2004-34.

b If the applicant is filing under the automatic change procedures of Rev Proc. 2008-52, the information required by section 8 02(3)(a)-(c) of Rev Proc 2004-34

c If the applicant is filing under the advance consent provisions of Rev. Proc. 97-27, the information required by section 8.03(2)(a)-(f) of Rev Proc. 2004-34.

2 If the applicant is requesting to change to the deferral method for advance payments described in Regulations section 1.451-5(b)(1)(ii), attach the following.

a A statement explaining how the advance payments meet the definition in Regulations section 1.451-5(a)(1).

b A statement explaining what portions of the advance payments, if any, are attributable to services, whether such services are integral to the provisions of goods or items, and whether any portions of the advance payments that are attributable to non-integral services are less than five percent of the total contract prices See Regulations sections 1 451-5(a)(2)(i) and (3)

c A statement explaining that the advance payments will be included in income no later than when included in gross receipts for purposes of the applicant's financial reports. See Regulations section 1.451-5(b)(1)(ii).

d A statement explaining whether the inventoriable goods exception of Regulations section 1 451-5(c) applies and if so, when substantial advance payments will be received under the contracts, and how the exception will limit the deferral of income

Schedule C—Changes Within the LIFO Inventory Method (see instructions)

Part I General LIFO Information

Complete this section if the requested change involves changes within the LIFO inventory method. Also, attach a copy of all **Forms 970,** Application To Use LIFO Inventory Method, filed to adopt or expand the use of the LIFO method.

1 Attach a description of the applicant's present and proposed LIFO methods and submethods for each of the following items:

a Valuing inventory (e.g , unit method or dollar-value method).

b Pooling (e.g , by line or type or class of goods, natural business unit, multiple pools, raw material content, simplified dollar-value method, inventory price index computation (IPIC) pools, vehicle-pool method, etc).

c Pricing dollar-value pools (e.g , double-extension, index, link-chain, link-chain index, IPIC method, etc).

d Determining the current-year cost of goods in the ending inventory (i e , most recent acquisitions, earliest acquisitions during the current year, average cost of current-year acquisitions, or other permitted method).

2 If any present method or submethod used by the applicant is not the same as indicated on Form(s) 970 filed to adopt or expand the use of the method, attach an explanation.

3 If the proposed change is not requested for all the LIFO inventory, attach a statement specifying the inventory to which the change is and is not applicable

4 If the proposed change is not requested for all of the LIFO pools, attach a statement specifying the LIFO pool(s) to which the change is applicable.

5 Attach a statement addressing whether the applicant values any of its LIFO inventory on a method other than cost For example, if the applicant values some of its LIFO inventory at retail and the remainder at cost, identify which inventory items are valued under each method.

6 If changing to the IPIC method, attach a completed Form 970.

Part II Change in Pooling Inventories

1 If the applicant is proposing to change its pooling method or the number of pools, attach a description of the contents of, and state the base year for, each dollar-value pool the applicant presently uses and proposes to use.

2 If the applicant is proposing to use natural business unit (NBU) pools or requesting to change the number of NBU pools, attach the following information (to the extent not already provided) in sufficient detail to show that each proposed NBU was determined under Regulations section 1 472-8(b)(1) and (2).

a A description of the types of products produced by the applicant. If possible, attach a brochure

b A description of the types of processes and raw materials used to produce the products in each proposed pool.

c If all of the products to be included in the proposed NBU pool(s) are not produced at one facility, state the reasons for the separate facilities, the location of each facility, and a description of the products each facility produces.

d A description of the natural business divisions adopted by the taxpayer State whether separate cost centers are maintained and if separate profit and loss statements are prepared.

e A statement addressing whether the applicant has inventories of items purchased and held for resale that are not further processed by the applicant, including whether such items, if any, will be included in any proposed NBU pool.

f A statement addressing whether all items including raw materials, goods-in-process, and finished goods entering into the entire inventory investment for each proposed NBU pool are presently valued under the LIFO method Describe any items that are not presently valued under the LIFO method that are to be included in each proposed pool

g A statement addressing whether, within the proposed NBU pool(s), there are items both sold to unrelated parties and transferred to a different unit of the applicant to be used as a component part of another product prior to final processing.

3 If the applicant is engaged in manufacturing and is proposing to use the multiple pooling method or raw material content pools, attach information to show that each proposed pool will consist of a group of items that are substantially similar. See Regulations section 1.472-8(b)(3).

4 If the applicant is engaged in the wholesaling or retailing of goods and is requesting to change the number of pools used, attach information to show that each of the proposed pools is based on customary business classifications of the applicant's trade or business. See Regulations section 1 472-8(c).

Schedule D—Change in the Treatment of Long-Term Contracts Under Section 460, Inventories, or Other Section 263A Assets (see instructions) N/A

Part I Change in Reporting Income From Long-Term Contracts (Also complete Part III on pages 7 and 8.)

1 To the extent not already provided, attach a description of the applicant's present and proposed methods for reporting income and expenses from long-term contracts. Also, attach a representative actual contract (without any deletion) for the requested change. If the applicant is a construction contractor, attach a detailed description of its construction activities

2a Are the applicant's contracts long-term contracts as defined in section 460(f)(1) (see instructions)? . . ☐ Yes ☐ No

b If "Yes," do all the contracts qualify for the exception under section 460(e) (see instructions)? . . . . ☐ Yes ☐ No
If line 2b is "No," attach an explanation.

c If line 2b is "Yes," is the applicant requesting to use the percentage-of-completion method using cost-to-cost under Regulations section 1 460-4(b)? . . . . . ☐ Yes ☐ No

d If line 2c is "No," is the applicant requesting to use the exempt-contract percentage-of-completion method under Regulations section 1.460-4(c)(2)? . . . . . ☐ Yes ☐ No
If line 2d is "Yes," attach an explanation of what cost comparison the applicant will use to determine a contract's completion factor.
If line 2d is "No," attach an explanation of what method the applicant is using and the authority for its use.

3a Does the applicant have long-term manufacturing contracts as defined in section 460(f)(2)? . ☐ Yes ☐ No

b If "Yes," attach an explanation of the applicant's present and proposed method(s) of accounting for long-term manufacturing contracts

c Attach a description of the applicant's manufacturing activities, including any required installation of manufactured goods.

4 To determine a contract's completion factor using the percentage-of-completion method.

a Will the applicant use the cost-to-cost method in Regulations section 1 460-4(b)? . . . . ☐ Yes ☐ No

b If line 4a is "No," is the applicant electing the simplified cost-to-cost method (see section 460(b)(3) and Regulations section 1.460-5(c))? . . . . . ☐ Yes ☐ No

5 Attach a statement indicating whether any of the applicant's contracts are either cost-plus long-term contracts or Federal long-term contracts

Part II Change in Valuing Inventories Including Cost Allocation Changes (Also complete Part III on pages 7 and 8)

1 Attach a description of the inventory goods being changed N/A

2 Attach a description of the inventory goods (if any) NOT being changed.

3a Is the applicant subject to section 263A? If "No," go to line 4a . . . . . ☐ Yes ☐ No

b Is the applicant's present inventory valuation method in compliance with section 263A (see instructions)? If "No," attach a detailed explanation . . . . . ☐ Yes ☐ No

4a Check the appropriate boxes below.

	Inventory Being Changed		Inventory Not Being Changed
	Present method	Proposed method	Present method
Identification methods:			
Specific identification			
FIFO			
LIFO			
Other (attach explanation)			
Valuation methods.			
Cost			
Cost or market, whichever is lower			
Retail cost			
Retail, lower of cost or market			
Other (attach explanation)			

b Enter the value at the end of the tax year preceding the year of change

5 If the applicant is changing from the LIFO inventory method to a non-LIFO method, attach the following information (see instructions).

a Copies of Form(s) 970 filed to adopt or expand the use of the method.

b **Only for applicants requesting advance consent.** A statement describing whether the applicant is changing to the method required by Regulations section 1.472-6(a) or (b), or whether the applicant is proposing a different method.

c **Only for applicants requesting an automatic change.** The statement required by section 22.01(5) of the Appendix of Rev Proc. 2008-52 (or its successor)

Part III **Method of Cost Allocation** (Complete this part if the requested change involves either property subject to section 263A or long-term contracts as described in section 460 (see instructions)) N/A

Section A—Allocation and Capitalization Methods

Attach a description (including sample computations) of the present and proposed method(s) the applicant uses to capitalize direct and indirect costs properly allocable to real or tangible personal property produced and property acquired for resale, or to allocate and, where appropriate, capitalize direct and indirect costs properly allocable to long-term contracts. Include a description of the method(s) used for allocating indirect costs to intermediate cost objectives such as departments or activities prior to the allocation of such costs to long-term contracts, real or tangible personal property produced, and property acquired for resale. The description must include the following.

1 The method of allocating direct and indirect costs (i.e., specific identification, burden rate, standard cost, or other reasonable allocation method).

2 The method of allocating mixed service costs (i.e., direct reallocation, step-allocation, simplified service cost using the labor-based allocation ratio, simplified service cost using the production cost allocation ratio, or other reasonable allocation method).

3 The method of capitalizing additional section 263A costs (i.e., simplified production with or without the historic absorption ratio election, simplified resale with or without the historic absorption ratio election including permissible variations, the U.S. ratio, or other reasonable allocation method).

Section B—Direct and Indirect Costs Required To Be Allocated

Check the appropriate boxes showing the costs that are or will be fully included, to the extent required, in the cost of real or tangible personal property produced or property acquired for resale under section 263A or allocated to long-term contracts under section 460. Mark "N/A" in a box if those costs are not incurred by the applicant If a box is not checked, it is assumed that those costs are not fully included to the extent required. Attach an explanation for boxes that are not checked

		Present method	Proposed method
1	Direct material		
2	Direct labor		
3	Indirect labor		
4	Officers' compensation (not including selling activities)		
5	Pension and other related costs		
6	Employee benefits		
7	Indirect materials and supplies		
8	Purchasing costs		
9	Handling, processing, assembly, and repackaging costs		
10	Offsite storage and warehousing costs		
11	Depreciation, amortization, and cost recovery allowance for equipment and facilities placed in service and not temporarily idle		
12	Depletion		
13	Rent		
14	Taxes other than state, local, and foreign income taxes		
15	Insurance		
16	Utilities		
17	Maintenance and repairs that relate to a production, resale, or long-term contract activity		
18	Engineering and design costs (not including section 174 research and experimental expenses)		
19	Rework labor, scrap, and spoilage		
20	Tools and equipment		
21	Quality control and inspection		
22	Bidding expenses incurred in the solicitation of contracts awarded to the applicant		
23	Licensing and franchise costs		
24	Capitalizable service costs (including mixed service costs)		
25	Administrative costs (not including any costs of selling or any return on capital)		
26	Research and experimental expenses attributable to long-term contracts		
27	Interest		
28	Other costs (Attach a list of these costs)		

Part III Method of Cost Allocation (see instructions) (continued)

Section C—Other Costs Not Required To Be Allocated (Complete Section C only if the applicant is requesting to change its method for these costs.)

		Present method	Proposed method
1	Marketing, selling, advertising, and distribution expenses		
2	Research and experimental expenses not included in Section B, line 26		
3	Bidding expenses not included in Section B, line 22		
4	General and administrative costs not included in Section B		
5	Income taxes		
6	Cost of strikes		
7	Warranty and product liability costs		
8	Section 179 costs		
9	On-site storage		
10	Depreciation, amortization, and cost recovery allowance not included in Section B, line 11		
11	Other costs (Attach a list of these costs.)		

Schedule E—Change in Depreciation or Amortization (see instructions)

Applicants requesting approval to change their method of accounting for depreciation or amortization complete this section Applicants ***must*** provide this information for each item or class of property for which a change is requested

Note. *See the* ***List of Automatic Accounting Method Changes*** *in the instructions for information regarding automatic changes under sections 56, 167, 168, 197, 1400I, 1400L, or former section 168* ***Do not*** *file Form 3115 with respect to certain late elections and election revocations (see instructions).*

1 Is depreciation for the property determined under Regulations section 1.167(a)-11 (CLADR)? ☐ Yes ☐ No
If "Yes," the only changes permitted are under Regulations section 1.167(a)-11(c)(1)(iii)

2 Is any of the depreciation or amortization required to be capitalized under any Code section (e.g , section 263A)? ☐ Yes ☐ No
If "Yes," enter the applicable section ►

3 Has a depreciation, amortization, or expense election been made for the property (e.g , the election under sections 168(f)(1), 179, or 179C)? ☐ Yes ☐ No
If "Yes," state the election made ►

4a To the extent not already provided, attach a statement describing the property being changed Include in the description the type of property, the year the property was placed in service, and the property's use in the applicant's trade or business or income-producing activity

b If the property is residential rental property, did the applicant live in the property before renting it? ☐ Yes ☐ No

c Is the property public utility property? ☐ Yes ☐ No

5 To the extent not already provided in the applicant's description of its present method, attach a statement explaining how the property is treated under the applicant's present method (e g., depreciable property, inventory property, supplies under Regulations section 1.162-3, nondepreciable section 263(a) property, property deductible as a current expense, etc.)

6 If the property is not currently treated as depreciable or amortizable property, attach a statement of the facts supporting the proposed change to depreciate or amortize the property.

7 If the property is currently treated and/or will be treated as depreciable or amortizable property, provide the following information for both the present (if applicable) and proposed methods:

a The Code section under which the property is or will be depreciated or amortized (e.g , section 168(g))

b The applicable asset class from Rev. Proc 87-56, 1987-2 C B. 674, for each asset depreciated under section 168 (MACRS) or under section 1400L; the applicable asset class from Rev Proc. 83-35, 1983-1 C.B. 745, for each asset depreciated under former section 168 (ACRS), an explanation why no asset class is identified for each asset for which an asset class has not been identified by the applicant

c The facts to support the asset class for the proposed method.

d The depreciation or amortization method of the property, including the applicable Code section (e.g , 200% declining balance method under section 168(b)(1)).

e The useful life, recovery period, or amortization period of the property

f The applicable convention of the property.

g A statement of whether or not the additional first-year special depreciation allowance (for example, as provided by section 168(k), 168(l), 168(m), 168(n), 1400L(b), or 1400N(d)) was or will be claimed for the property. If not, also provide an explanation as to why no special depreciation allowance was or will be claimed

FORM 3115 PART II, LINE 13 STATEMENT 1

BUSINESS ACTIVITY	NAICS CODE
FREE SPEECH PROJECT	900099

THE FUND CONTINUED TO SUPPORT THE FREE SPEECH PROJECT LAUNCHED IN 2010. THIS PROJECT PROMOTES FREEDOM OF SPEECH ON PRO-LIFE ISSUES DURING 2010 AND 2011, THE FUND DONATED $12,000 AND $194,779 TO A CHARITABLE ORGANIZATION THAT WORKS IN CHALLENGING THE STATE LAWS THAT UNCONSTITUTIONALLY RESTRICT THE FREEDOM OF SPEECH OF PRO-LIFE AND OTHER ISSUE ORGANIZATIONS IN THE PUBLIC SQUARE. DURING 2012, THE FUND MADE SIMILAR DONATIONS OF $685,316.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED).

BUSINESS ACTIVITY	NAICS CODE
HUMAN TRAFFICKING PROJECT	900099

IN 2012 THE FUND ROLLED OUT ITS FIELD INTERVIEWS AND QUESTIONNAIRES REGARDING THE HEALTH IMPACTS OF SEX TRAFFICKING, ESPECIALLY REPRODUCTIVE HEALTH IMPACTS. THIS ORIGINAL RESEARCH WAS CONDUCTED IN NEARLY A DOZEN LOCATIONS ACROSS THE COUNTRY. ANALYSIS OF THE DATA BEGAN AND WAS ACCOMPANIED BY REVIEW OF CASE LAW AND OTHER STUDIES RELATED TO THE HEALTH AND WELL-BEING OF TRAFFICKING VICTIMS WORK BEGAN ON DEVELOPING A REPORT ON THE STUDY, BRIEFINGS FOR POLICY MAKERS, AND RECOMMENDATIONS FOR IMPROVEMENTS IN ANTI-TRAFFICKING STRATEGIES AND PUBLIC POLICY TO PROMOTE SWIFTER RESCUE OF VICTIMS AND PREVENTION/REDUCTION OF THE PHYSICAL, PSYCHOLOGICAL AND EMOTIONAL HARMS THEY INCUR.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED)

FORM 3115 PART II, LINE 13 STATEMENT 1

BUSINESS ACTIVITY	NAICS CODE
PREGNANCY CENTER/ABORTION DATA COLLECTION	900099

THE FUND COLLECTS DATA ON THE INCIDENCE OF ABORTION IN THE UNITED STATES, EVALUATES STATE AND FEDERAL POLICIES FOR THE COLLECTION OF SUCH DATA,AND MAKES RECOMMENDATIONS TO INDIVIDUAL RESEARCHERS AND PUBLIC BODIES ON WAYS TO IMPROVEMENT THE COMPLETENESS, TIMELINESS, ACCURACY, AND USEFULNESS OF THESE REPORTS IN FURTHERING MATERNAL AND CHILD HEALTH THE PROJECT INCLUDED ADVISING A NATIONAL PREGNANCY CENTER NETWORK ON PROJECTS DESIGNED TO USE STATE- AND COUNTY-LEVEL DATA TO EVALUATE THE EFFECTIVENESS OF MARKETING AND OTHER COMMUNICATIONS STRATEGIES TO INCREASE PATIENT TRAFFIC TO CARE CENTERS.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED)

BUSINESS ACTIVITY	NAICS CODE
WEB DEVELOPMENT	900099

IN 2012 THE FUND LAUNCHED ITS WEBSITE AT LOZIERINSTITUTE.ORG AND BEGAN TO USE IT AS THE PUBLICATION HUB FOR THE CHARLOTTE LOZIER INSTITUTE'S (CLI) REPORTS, BLOGS, FACT SHEETS, COMMENTARIES ON LIFE ISSUES, WITH A FOCUS ON SCIENCE, STATISTICS AND PUBLIC POLICY ANALYSIS CLI PUBLISHED THE WORK OF LEADING ACADEMIC FIGURES, PHYSICIANS AND OTHER ANALYSTS WITH THE ABILITY TO COVER ISSUES IN HEALTH CARE POLICY, STATISTICS, MEDICAL DEVELOPMENTS, ETHICS AND BIO-TECHNOLOGY WITH HUMAN LIFE IMPLICATIONS AN ADVISORY COMMITTEE OF EXPERTS WAS ANNOUNCED AND NEW MEMBERS ARE BEING RECRUITED. COVERAGE OF EVERY FIELD RELEVANT TO THE MISSION OF CLI REMAINS THE GOAL AND SUBSTANTIAL PROGRESS WAS MADE IN 2012 TOWARD THE ACHIEVEMENT OF THIS OBJECTIVE

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED)

FORM 3115 PART II, LINE 13 STATEMENT 1

BUSINESS ACTIVITY	NAICS CODE
POLLING AND ISSUE RESEARCH	900099

THE FUND CONDUCTED FOCUS GROUP AND POLLING RESEARCH IN EARLY 2012 TO EXPLORE PUBLIC PERCEPTION OF LIFE ISSUES RELATED TO CONTRACEPTION, ABORTION, WOMEN'S HEALTH AND PUBLIC FUNDING PRIORITIES. THE FUND CONDUCTED AND PUBLISHED POLLING RESEARCH ON PUBLIC ATTITUDES TOWARD THE LEGAL PERMISSIBILITY OF ABORTIONS PERFORMED FOR THE PERSON OF DESTROYING AN UNBORN CHILD OF A PARTICULAR SEX THE FUND ALSO CONDUCTED AND PUBLISHED STUDIES ON STATE ABORTION REPORTING REQUIREMENTS, THE TYPES OF STEM CELL RESEARCH RECEIVING SUPPORT FROM STATE-FINANCED RESEARCH INSTITUTIONS, THE GROWTH OF NEONATAL HOSPICE CENTERS ACROSS THE UNITED STATES, AND THE EFFECTS OF LEGALIZATION OF PHYSICIAN-ASSISTED SUICIDE IN VULNERABLE PATIENT POPULATIONS.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED).

BUSINESS ACTIVITY	NAICS CODE
OUTREACH	900099

AS A NEW RESEARCH AND EDUCATION ORGANIZATION, THE FUND SEEKS TO AVOID DUPLICATION OF WORK BEING DONE BY EXISTING ORGANIZATIONS, TO CREATE COLLABORATIVE RELATIONSHIPS AND PROJECTS WHEREVER POSSIBLE, AND TO DISSEMINATE ITS FINDINGS AND RECOMMENDATIONS TO A BROAD NATIONAL, LOCAL, AND INTERNATIONAL POLICY COMMUNITY. ATTENDANCE BY STAFF MEMBERS AT RELEVANT EVENTS ON POLICY ISSUES AND RESEARCH TOPICS IS FUNDAMENTAL TO THE DEVELOPMENT AND RETENTION OF INFORMED PERSONNEL CAPABLE OF UTILIZING RELATED WORK TO ADVANCE THE MISSION OF THE FUND. CLI STAFF MEMBERS ATTENDED BRIEFINGS AND EVENTS RELATED TO THE ORGANIZATION'S MISSION IN WASHINGTON, D.C., AND LOS ANGELES, CALIFORNIA IN 2012

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED).

FORM 3115 PART II, LINE 13 STATEMENT 1

BUSINESS ACTIVITY	NAICS CODE
MEDIA	900099

IN 2012, THE FUND PARTICIPATED IN A WIDE VARIETY OF MEDIA INTERVIEWS AND PUBLISHED COMMENTARY ON HEALTH CARE POLICY, SEX SELECTION ABORTION, CONSCIENCE PROTECTION ISSUES, ETHICAL STEM CELL RESEARCH, U.S FOREIGN POLICY REGARDING REPRODUCTIVE HEALTH ISSUES, AND RELATED TOPICS. ARTICLES WRITTEN BY THE FUND'S STAFF MEMBERS APPEARED IN THE WASHINGTON EXAMINER, THE CATHOLIC THING (ONLINE), THE BLAZE (ONLINE), THE FOUNDRY AND THE CORNER WEBSITES, AND ROLL CALL (PRINT EDITION) CLI PERSONNEL WERE INTERVIEWED IN MANY MEDIA OUTLETS, INCLUDING FOX NEWS, AMERICAN FAMILY RADIO, AND FAMILY NEWS IN FOCUS. CLI PERSONNEL AND CLI STUDIES WERE CITED IN POLITICO, THEHILL.COM, DESERET NEWS, BUZZFEED COM AND THE WASHINGTON POST, AMONG OTHERS.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED).

BUSINESS ACTIVITY	NAICS CODE
MEMBERSHIP COMMUNICATIONS	900099

CLI MAINTAINS SEVERAL LISTS OF INTERESTED MEMBERS OF THE PUBLIC, INCLUDING DONORS, POLICY ALLIES, MEDIA CONTACTS, AND INTERESTED CITIZENS. CLI COMMUNICATES WITH EACH OF THESE CONSTITUENCES THROUGH ITS PARTICIPATION IN A QUARTERLY NEWSLETTER COPUBLISHED WITH SBA LIST, PRINT COPIES OF ITS MAJOR REPORTS, COMMENTARIES, FACT SHEETS, AND EMAIL ALERTS ANNOUNCING THE RELEASE OF NEW PUBLICATIONS AND COMMENTARIES. MOST LISTS CURRENTLY NUMBER IN THE HUNDREDS OF ADDRESSEES AND NEARLY ALL OF THESE ARE DOMESTIC U S. CONTACTS.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED).

FORM 3115 PART II, LINE 13 STATEMENT 1

BUSINESS ACTIVITY	NAICS CODE
END OF LIFE CARE	900099

DISRESPECT FOR HUMAN LIFE AND EROSION OF ITS VALUE THROUGH SKEWED PERSONAL MORALITY AND PUBLIC POLICY IS AN INCREASING CONCERN IN AN AGING AND MATERIALISTIC SOCIETY. CLI DEVOTED RESOURCES IN 2012 TO ANALYSIS OF THE DANGERS POSED TO HUMAN LIFE BY PHENOMENA LIKE EUTHANASIA, PHYSICIAN-ASSISTED SUICIDE, AND RATIONING OF HEALTH CARE. THIS EFFORT INCLUDED POLICY PAPERS, BLOGS, AND OTHER COMMENTARIES PUBLISHED AT LOZIERINSTITUTE.ORG AND DISTRIBUTED TO OTHER PUBLICATIONS, MEDIA OUTLETS, SUPPORTERS, AND CITIZEN GROUPS.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED)

BUSINESS ACTIVITY	NAICS CODE
EXPERT WITNESS PROGRAM	900099

ONE OF THE KEY ROLES OF THE LOZIER INSTITUTE IS TO IDENTIFY ACADEMIC AND POLICY EXPERTS WITH SPECIFIC KNOWLEDGE OF RELEVANT RESEARCH AND TO ASSIST THOSE EXPERTS WITH COMMUNICATIONS, FINANCIAL AND LOGISTICAL SUPPORT SO THAT THEY CAN TESTIFY AT PUBLIC HEARINGS BEFORE CITY AND COUNTY OFFICIALS, STATE LEGISLATIVE COMMITTEES AND COMMISSIONS, AND FEDERAL BODIES, INCLUDING CONGRESSIONAL COMMITTEES. CLI HAS SUPPORTED EXPERTS TO PROVIDE ORAL AND WRITTEN TESTIMONY ON SUCH TOPICS AS THE IMPACT OF PARENTAL NOTICE LAWS ON THE PERFORMING OF ABORTIONS ON MINOR CHILDREN AND THE DEVELOPMENT OF PERINATAL HOSPICE. ENSURING EXPERTISE IS AVAILABLE WHEN AND WHERE IT IS NEEDED IS ESSENTIAL TO PUBLIC EDUCATION ON LIFE ISSUES.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED).

SUSAN B. ANTHONY LIST EDUCATION FUND 26-4788700

FORM 3115 PART II, LINE 13 STATEMENT 1

BUSINESS ACTIVITY	NAICS CODE
SPECIAL PROJECT WRITING	900099

IN ADDITION TO ITS OTHER PROGRAM EMPHASES, CLI SUPPORTS INDIVIDUAL AD-HOC WRITING AND RESEARCH PROJECTS ON VARIOUS TOPICS IN BIOETHICS AND SANCTITY OF HUMAN LIFE ISSUES THESE PROJECTS INCLUDE POLICY PAPERS, FACT SHEETS, COMMENTARIES FOR PUBLICATION ON THE CLI WEB SITE OR IN THE GENERAL MEDIA (PRINT OR ELECTRONIC), BLOGS, AND OTHER FORMATS WRITERS ARE DRAWN FROM CLI'S LIST OF EXPERT ADVISORS OR OTHERS WITH SPECIAL SKILLS BUT NO OFFICIAL ROLE WITH CLI.

THE FUND IS REQUESTING A CHANGE FROM CASH BASIS (CURRENT) TO ACCRUAL BASIS (REQUESTED)

SUSAN B ANTHONY LIST EDUCATION FUND 26-4788700

FORM 3115 PART IV, LINE 25 STATEMENT 2

DESCRIPTION	FYE 12/31/11 AMOUNT	§ 481(a) ADJUSTMENT
INCOME ACCRUED BUT NOT RECEIVED		
ACCOUNTS RECEIVABLE	-	-
EXPENSES ACCRUED BUT NOT PAID		
ACCOUNTS PAYABLE	(3,919)	
DUE TO AFFILIATES	-	(3,919)
EXPENSES PAID IN ADVANCE		
PREPAID EXPENSES	-	
SECURITY DEPOSIT	-	-
ADJUSTMENT TO TEMP RESTRICTED NET ASSETS		
LOAN FROM RESTRICTED NET ASSETS	(15,000)	(15,000)
TOTAL SECTION 481(a) ADJUSTMENT		**(18,919)**

NOTE: THE FUND DOES NOT CONDUCT ANY UNRELATED BUSINESS ACTIVITIES, AND, ACCORDINGLY, DOES NOT PAY ANY UNRELATED BUSINESS INCOME TAXES. AS SUCH, THE ABOVE SECTION 481(a) ADJUSTMENT IS NOT USED AS AN ADDITION TO OR DEDUCTION FROM INCOME TAXES.

INSTEAD, THE FUND ONLY FILES THE FORM 990 ANNUAL INFORMATION RETURN THE ABOVE ADJUSTMENT IS REFLECTED AS AN "OTHER CHANGE IN NET ASSETS" ON 990 PART XI, AND IS ALSO DISCLOSED ON SCHEDULE O IN RELATION TO 990 PART XII, LINE 1.

SUSAN B. ANTHONY LIST EDUCATION FUND 26-4788700

FORM 3115 SCHEDULE A, PART I, LINE 3 STATEMENT 3

AUDITED STATEMENT OF ACTIVITIES	YEAR ENDED DECEMBER 31, 2011
Revenue	
Contributions	$ 634,615
Total revenue	634,615
Expense - Note E	
Grants	195,279
Personnel	65,167
Consulting	74,043
Web Editor	-
Focus Group Costs	-
Mailing	11,211
Travel	2,182
Accounting	2,868
Office	
State Registration Fees	
Rent	2,976
Media	
Miscellaneous	2,133
Advertising	8,500
Database	
Printing	
Legal	980
Telephone	1,050
TV Advertising	96,742
Program Development	900
Total expense	464,031
Change in net assets	170,584
Net assets, beginning of year	10,357
Net assets, end of year	$ 180,941

NOTE: PREPARED ON ACCRUAL BASIS OF ACCOUNTING.

SUSAN B ANTHONY LIST EDUCATION FUND 26-4788700

FORM 3115 SCHEDULE A, PART I, LINE 3 STATEMENT 4

AUDITED STATEMENT OF FINANCIAL POSITION DECEMBER 31, 2011

Assets	
Cash	**$ 200,074**
Furniture & Equipment	**3,023**
Less accumulated depreciation to date	**(206)**
Total assets	**$ 202,891**
Liabilities and Net Assets	
Liabilities	
Accounts payable and accrued expenses	**$ 3,918**
Deferred revenue	**18,032**
Total liabilities	**21,950**
Net assets	
Unrestricted	**117,927**
Temporarily Restricted	**63,014**
Total liabilities and net assets	**$ 202,891**

NOTE PREPARED ON ACCRUAL BASIS OF ACCOUNTING.