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Form 990-EZ

Department of the Treasury  
Internal Revenue Service

Short Form

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Information about Form 990-EZ and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-1150

2014

Open to Public Inspection

A For the 2014 calendar year, or tax year beginning 01-01-2014, and ending 12-31-2014

B

Check if applicable

☒ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C

Name of organization  
FORWARD MT

Number and street (or P O box, if mail is not delivered to street address)Room/suite  
136 EAST BROADWAY

City or town, state or province, country, and ZIP or foreign postal code  
MISSOULA, MT 59802

D

Employer identification number  
13-4285849

E Telephone number  
(406) 542-8683

F Group Exemption Number

G Accounting Method

☒ Cash

☐ Accrual

Other (specify) \_\_\_\_\_

H

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

I Website:

[WWW.FORWARDMONTANA.ORG](http://WWW.FORWARDMONTANA.ORG)

J Tax-exempt status

(check only one) - ☐ 501(c)(3) ☒ 501(c)( 4) ☐ (insert no ) ☐ 4947(a)(1) or ☐ 527

K Form of organization

☒ Corporation

☐ Trust

☐ Association

Other \_\_\_\_\_

L

Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. \$ 154,764

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)

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

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	48,683
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	101,190
	4	Investment income	4	7
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less cost or other basis and sales expenses	5b	696
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	-696
	6	Gaming and fundraising events		
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b	Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	0
Expenses	c	Less direct expenses from gaming and fundraising events	6c	0
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	
	7a	Gross sales of inventory, less returns and allowances	7a	300
	b	Less cost of goods sold	7b	2,147
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	-1,847
	8	Other revenue (describe in Schedule O)	8	4,584
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	151,921
	10	Grants and similar amounts paid (list in Schedule O)	10	
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	80,664
Net Assets	13	Professional fees and other payments to independent contractors	13	10,326
	14	Occupancy, rent, utilities, and maintenance	14	7,938
	15	Printing, publications, postage, and shipping	15	12,984
	16	Other expenses (describe in Schedule O)	16	14,641
	17	Total expenses. Add lines 10 through 16	17	126,553
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	25,368
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	42,807
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	68,175

Part II

Balance Sheets (see the instructions for Part II)

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

	(A) Beginning of year	(B) End of year	
22 Cash, savings, and investments	18,450	22	49,593
23 Land and buildings		23	
24 Other assets (describe in Schedule O)	24,357	24	18,582
25 Total assets	42,807	25	68,175
26 Total liabilities (describe in Schedule O)		26	
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	42,807	27	68,175

Part III

Statement of Program Service Accomplishments (see the instructions for Part III)

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

What is the organization's primary exempt purpose?  
TRAIN, MOBILIZE, AND ELECT THE NEXT GENERATION OF YOUNG LEADERS IN THE STATE OF MONTANA

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title

28 FORWARD MONTANA'S MISSION IS TO TRAIN, MOBILIZE AND ELECT THE NEXT GENERATION OF PROGRESSIVE LEADERS IN THE STATE OF MONTANA TRAIN FORWARD MONTANA TRAINS YOUNG PEOPLE IN HOW TO MANAGE CAMPAIGNS, BOTH FOR ISSUES & CANDIDATES WE TRAIN INTERNS AND VOLUNTEERS IN THE ART AND SCIENCE OF GRASSROOTS ORGANIZING AND ISSUE ADVOCACY IN 2014, FORWARD MONTANA HELPED TO TRAIN 45 INTERNS AND 7 FELLOWS, AS WELL AS MOBILIZED HUNDREDS OF VOLUNTEERS TO DONATE TIME FOR ACTIVITIES PROGRESSIVE HAPPY HOURS FORWARD MONTANA HOSTS HAPPY HOURS TO EDUCATE AND ACTIVATE YOUNG PEOPLE AROUND CURRENT EVENTS IN THEIR COMMUNITY AND IN MONTANA IN 2014, FORWARD MONTANA HELD SEVERAL PROGRESSIVE HAPPY HOURS, INCLUDING DEBATE AND ELECTION NIGHT WATCH PARTIES MOBILIZE FORWARD MONTANA ORGANIZES BUS TRIPS IN WHICH WE TAKE YOUNG MEMBERS AROUND THE STATE TO KNOCK ON DOORS FOR ISSUES AND/OR CANDIDATES THAT YOUNG PEOPLE CARE ABOUT THROUGH THESE BUS TRIPS, WE TRAIN YOUNG PEOPLE IN POLITICAL ADVOCACY AND GRASSROOTS ORGANIZING IN 2014, FORWARD MT TOOK BUS TRIPS AND DID LOCAL CANVASSES TO MOBILIZE YOUNG PEOPLE TO VOTE IN THE 2014 ELECTION, AND TO DEFEAT LR126, A STATEWIDE BALLOT ISSUE TO ELIMINATE ELECTION DAY REGISTRATION AS PART OF THAT EFFORT, FORWARD MT ENGAGED HUNDREDS OF YOUNG VOLUNTEERS TO KNOCK ON OVER 19,000 DOORS IN GALLATIN AND MISSOULA COUNTIES IN ORDER TO GET OUT THE VOTE AND EDUCATE VOTERS ON THE NEED TO PROTECT ELECTION DAY REGISTRATION LOBBYING FORWARD MT DISTRIBUTED 15,000 VOTER GUIDES IN MISSOULA AND GALLATIN COUNTIES (COLLECTIVELY THESE GUIDES WERE INTENDED TO SHOW YOUNG PEOPLE WHERE THE CANDIDATES STOOD ON ISSUES THAT MATTERED TO THEM FORWARD MT ALSO PLAYED A LEAD ROLE IN DEFEATING LR126, A STATEWIDE BALLOT INITIATIVE THAT WOULD HAVE ELIMINATED ELECTION DAY REGISTRATION OVER HALF OF THE PEOPLE THAT USE ELECTION DAY REGISTRATION IN MONTANA ARE UNDER THE AGE OF 30, SO THIS BALLOT INITIATIVE WOULD HAVE HAD A MAJOR EFFECT ON YOUTH VOTING IN MONTANA  
(Grants \$ 126,553) If this amount includes foreign grants, check here

29  
  
(Grants \$ ) If this amount includes foreign grants, check here

30  
  
(Grants \$ ) If this amount includes foreign grants, check here

31 Other program services (describe in Schedule O)  
(Grants \$ ) If this amount includes foreign grants, check here

32 Total program service expenses (add lines 28a through 31a)

Expenses  
(Required for section 501(c)(3) and 501(c)(4) organizations, optional for others )

28a

29a

30a

31a

32 126,553

Part IV

List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated — see the instructions for Part IV)

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

(a) Name and title	(b) Average hours per week devoted to position	(c)Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
Chase Mohney President	1 00	0		
Denver Henderson SEC/TREASURER	1 00	0		
LINDSAY MURDOCK Director	0 50	0		
JEN GURSKY Director	0 50	0		
John Brueggeman Director	0 50	0		
Molly Bell Director	0 50	0		
RAPHAEL GRAYBILL Director	0 50	0		
KAYJE BOOKER CEO	24 00	21,267		
TESS A CARLSON DIRECTOR OF OPERATIONS	24 00	15,887		

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

		Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O . . . . .	33	No
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions) . . . . .	34	No
35a	Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)? . . . . .	35a	No
b	If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O . . . . .	35b	No
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III . . . . .	35c	No
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N . . . . .	36	No
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶	37a	
b	Did the organization file Form 1120-POL for this year? . . . . .	37b	No
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return? . . . . .	38a	No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . .	38b	
39	Section 501(c)(7) organizations Enter . . . . .		
a	Initiation fees and capital contributions included on line 9 . . . . .	39a	0
b	Gross receipts, included on line 9, for public use of club facilities . . . . .	39b	0
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶, section 4912 ▶, section 4955 ▶ . . . . .		
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I . . . . .	40b	No
c	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ . . . . .		
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax on line 40c reimbursed by the organization . . . . .		
e	All organizations At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T . . . . .	40e	No
41	List the states with which a copy of this return is filed ▶ . . . . .		
42a	The organization's books are in care of ▶ KAYJE BOOKER Telephone no ▶ (406) 542-8683 Located at ▶ 136 EAST BROADWAY SUITE 1 MISSOULA, MT ZIP + 4 ▶ 59802 . . . . .		
b	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)? If "Yes," enter the name of the foreign country ▶ . . . . .  See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) . . . . .	42b	No
c	At any time during the calendar year, did the organization maintain an office outside the U S ? If "Yes," enter the name of the foreign country ▶ . . . . .	42c	No
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here . . . . . and enter the amount of tax-exempt interest received or accrued during the tax year . . . . .	43	
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ . . . . .	44a	No
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ . . . . .	44b	No
c	Did the organization receive any payments for indoor tanning services during the year? . . . . .	44c	No
d	If "Yes," to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O . . . . .	44d	No
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .	45a	No
45b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions) . . . . .	45b	No

		Yes	No
46	Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .		No

Part VI

Section 501(c)(3) organizations only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51

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

		Yes	No
47	Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II . . . . .		
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .		
49a	Did the organization make any transfers to an exempt non-charitable related organization? . . . . .		
49b	If "Yes," was the related organization a section 527 organization? . . . . .		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization If there is none, enter "None "				
(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
NONE				

f	Total number of other employees paid over \$100,000 . . . . .	
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51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization If there is none, enter "None "		
(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation
NONE		

d	Total number of other independent contractors each receiving over \$100,000. . . . .	
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52	Did the organization complete Schedule A? <b>NOTE.</b> All Section 501(c)(3) organizations must attach a completed Schedule A . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No
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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	<div>*****</div> <div>Signature of officer</div>			<div>2015-08-14</div> <div>Date</div>	
	<div>KAYJE BOOKER Executive Director</div> <div>Type or print name and title</div>				
Paid Preparer Use Only	Print/Type preparer's name HEIDI A FOLEY		Preparer's signature	Date	Check <input type="checkbox"/> if self-employed PTIN P00942235
	Firm's name <div>SAX CERTIFIED PUBLIC ACCOUNTING PC</div>				Firm's EIN <div></div>
	Firm's address <div>319 W PINE ST SUITE 2 MISSOULA, MT 59802</div>				Phone no (406) 830-3430
May the IRS discuss this return with the preparer shown above? See instructions . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No					

**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 990-EZ or to provide any additional information.****▶ Attach to Form 990 or 990-EZ.****▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at  
[www.irs.gov/form990](http://www.irs.gov/form990).**

OMB No 1545-0047

**2014****Open to Public  
Inspection**Name of the organization  
FORWARD MT**Employer identification number**

13-4285849

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Other Expenses 1001	Advertising and Promotion \$543
Other Expenses 1005	Travel \$2232
Other Expenses 1012	Insurance \$911
Other Expenses 2	TECH AND COMMUNICATIONS \$3535
Other Expenses 3	BANK SERVICE CHARGES \$2292
Other Expenses 4	MISCELLANEOUS \$1862
Other Expenses 5	PAYROLL PREPARATION FEES \$1213
Other Expenses 6	EVENT EXPENSE \$899
Other Expenses 7	SUPPLIES \$631
Other Expenses 8	TRAINING \$523
Other Assets 1002	Furniture and Fixtures - Beginning \$696 Furniture and Fixtures - Ending \$0
Other Assets 1	RECEIVABLE FROM FORWARD MONTANA - Beginning \$23661 RECEIVABLE FROM FORWARD MONTANA - Ending \$18582
COST SHARING AGREEMENT	FORWARD MONTANA 501(C)4 AND THE FORWARD MONTANA FOUNDATION 501(C)3 HAVE ENTERED INTO A COST SHARING AGREEMENT TO MINIMIZE DUPLICATED EXPENSES AND TO CARRY OUT THEIR COMPLIMENTARY MISSIONS IN AN ECONOMICAL AND EFFICIENT MANNER THROUGH THE SHARING OF EMPLOYEES, OFFICE SPACE, AND EQUIPMENT