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# EXTENDED TO AUGUST 17, 2015 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.

Open to Public

Department of the Treasury internal Revenue Service

Information about Form 990 and its instructions is at www.irs.gov/form990.

Inspection

OMB No 1545-0047

Α	For th	e 2014 calendar year, or tax year beginning and	l ending					
В	Check if applicat	C Name of organization		D Employer identific	ation number			
	Addr							
Ē	Name chan	TIL TARGETHING ON CHARACTER		31-16	563243			
Ē	initial	All I and Annual (as D.O. have foresteen and delivered to attend address)	Room/suite	1				
Ē	Final	312 WAINTIN CODEEN	3600	513-6	521-7500			
	term:			G Gross receipts \$	631,629.			
	Amer	CINCINNATI, OH 45202		H(a) Is this a group ret	turn			
	Appli tion	F Name and address of principal differ INDAD II. PAILINGON,	PH.D.	for subordinates?	Yes X No			
	pend	SAME AS C ABOVE		H(b) Are all subordinates inc	cluded? Yes No			
1	Tax-ex	empt status: X 501(c)(3) 501(c)( )◀ (insert no.) 4947(a)(1)	or 527	If "No," attach a li	ist. (see instructions)			
		te: ► VIACHARACTER.ORG		H(c) Group exemption				
		forganization: X Corporation Trust Association Other	L Year	of formation: 1999 M	State of legal domicile: OH			
LP	art I	Summary						
ģ	1	Bnefly describe the organization's mission or most significant activities: TO E						
Governance		SCIENTIFIC TOOLS FOR THE SCIENCE OF HUMA						
ern	2	Check this box  fithe organization discontinued its operations or dispo	sed of more	1 1	_			
Ş	3	Number of voting members of the governing body (Part VI, line 1a)			6			
•ĕ	4	Number of independent voting members of the governing body (Part VI, line 1b)	•	4	3			
Activities	5	Total number of individuals employed in calendar year 2014 (Part V, line 2a)		5	3			
Ĭ	6	Total number of volunteers (estimate if necessary)		6				
Ac		Total unrelated business revenue from Part VIII, column (C), line 12		<mark>7a</mark>	0.			
_	b	Net unrelated business taxable income from Form 990 T, line 34			0.			
7		Contributions and grants (Part VIII line 1h)		Prior Year 101,000.	Current Year 28,063.			
Z O L	8	Contributions and grants (Part VIII, line 1h)		474,336.	550,730.			
e,	9	Program service revenue (Part VIII, line 2g)	•	869.	14,096.			
e Be	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)		16,194.	14,345.			
		Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-	592,399.	607,234.			
<del>-</del>	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) Grants and similar amounts paid (Part IX, column (A), lines 1-3)		0.	0.			
	1	Benefits paid to or for members (Part IX, column (A), line 4)		0.	0.			
SEANNEU	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	••	195,727.	179,028.			
Zë	162		•	0.	0.			
	. b	Professional rundraising fees (Part IX, column (A), line 11e)  Total fundraising expenses (Part IX, column (D), line 25)	0.					
ۺۣ	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		269,512.	439,912.			
U)	18	Total expenses Asid lines 3.17 (must equal Part IX, column (A), line 25)		465,239.	618,940.			
	19	Revenue less expenses, Subtractine 18 from line 12		127,160.	<11,706.			
50	3	OCDEN IIT	Ве	ginning of Current Year	End of Year			
sets	20	total assets (Part x, line 16)		603,037.	590,473.			
Ž	21	Total liabilities (Part X, line 26)		1,340.	482.			
Net Assets or	22	Net assets or fund balances Subtract line 21 from line 20		601,697.	589,991.			
	art II	Signature Block						
Une	der pena	lties of perjury, I declare that I have examined this return, including accompanying schedule	s and statem	ents, and to the best of my	knowledge and belief, it is			
true	e, correc	t, and complete. Declaration of preparer (other than officer) is based on all information of wi	hich preparei	has any knowledge.				
		Je Williams		16/1/15	· · · · · · · · · · · · · · · · · · ·			
Sig		Signature of officer		Date/				
He	re	NEAL H. MAYERSON, PH.D., PRESIDENT Type or print name and title			<del> </del>			
			i i	Date Check	PTIN			
D-1		Print/Type preparer's name Preparer's signature		₁	<b>-</b> 1			
Pai		KENNETH B. PITCHER KENNETH B. PITC		05/20/15 self-employed				
	parer	Firm's name PITCHER, ENDERS & DROHAN CPA'S,	INC.	Firm's EIN	31-0926187			
USI	Only	Firm's address 7755 MONTGOMERY ROAD, SUITE 325 CINCINNATI, OH 45236		Dhone no / 51	3)554-4600			
NA-	v the !!	RS discuss this return with the preparer shown above? (see instructions)		Filolie IIO. ( DI	X Yes No			
	001 11-0		ons.	1	Form <b>990</b> (2014)			
				<u> </u>				

Form 990 (2014)

# Form 990 (2014) VALUES IN ACTION INSTITUTE Part IV Checklist of Required Schedules

1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?		Yes	No
	If "Yes," complete Schedule A	1	x	
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2	X	
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		X
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect			
	dunng the tax year? If "Yes," complete Schedule C, Part II	4		X
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		X
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		_X_
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			77
8	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		<u> </u>
0	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III			X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for	8		
•	amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services?			
	If "Yes," complete Schedule D, Part IV	9		х
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent			
	endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	10		Х
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X			
	as applicable.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,			
	Part VI	11a	X	
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		<u>X</u>
С	Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total		ĺ	v
ч	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII  Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in	11c		<u>X</u>
u	Part X, line 16? If "Yes," complete Schedule D, Part IX	444	Ì	х
е	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11d 11e	х	
	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses	1,0		
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f	ŀ	X
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete			
	Schedule D, Parts XI and XII	12a		X
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		<u>X</u>
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		<u>X</u>
	Did the organization maintain an office, employees, or agents outside of the United States?	14a		<u>X</u>
O	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 unliked at \$100,000			
	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		İ	v
15	or more? If "Yes," complete Schedule F, Parts I and IV  Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any	14b	-	<u>X</u>
	foreign organization? If "Yes " complete Schedule E. Parts II and IV	15		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to		$\neg \uparrow$	
	or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,			
	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines		T	
	1c and 8a? If "Yes," complete Schedule G, Part II	18		<u>X</u>
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"			
	complete Schedule G, Part III	19	_	X
	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		<u>X</u>
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		

Form 990 (2014) VALUES IN ACTION INSTITUTE
Part IV Checklist of Required Schedules (continued)

		-	Yes	No
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21		X
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on			
	Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		X
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			i
	Schedule J	23	X	
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 25a	24a		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
С	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), 501(c)(4), and 501(c)(29) 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		X
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		X
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or			
	former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes,"			
	complete Schedule L, Part II	26		X
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial	1		
	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		X
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).			
а	A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28a		_X_
b	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28b		X
С	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		<u>X</u>
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29		<u> </u>
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation			
	contributions? If "Yes," complete Schedule M	30		<u> X</u>
31	Did the organization liquidate, terminate, or dissolve and cease operations?			
	If "Yes," complete Schedule N, Part I	31		<u> </u>
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete			7.5
	Schedule N, Part II	32		<u> </u>
33	Did the organization own 100% of an entity disregarded as sε parate from the organization under Regulations			v
	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	_33		<u>X</u>
	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	X	
	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X	
	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity	25.	~	
	within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b	Х	
	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?			v
	If "Yes," complete Schedule R, Part V, line 2	36		<u> </u>
	Did the organization conduct more than 5% of its activities through an entity that is not a related organization	~		v
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI  Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?	37		<u> </u>
38	Note. All Form 990 filers are required to complete Schedule O	38	x	
	Note: All total 990 mais are required to complete ochequie o	, 1	<u> </u>	2014)

## Form 990 (2014) VALUES IN ACTION INSTITUTE Part V Statements Regarding Other IRS Filings and Tax Compliance

1a Enter the number reported in Box 3 of Form 1986. Enter 0-4 most applicable		Check if Schedule O contains a response or note to any line in this Part V	•	,	L
be Enter the number of Forms W.SS included in line 18. Enter 0-4 finot applicable   Obt the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?  2a Enter the number of employees reported on Form W.3. Transmitted of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return  3 b if at least one is reported on line 2a, did the organization file all required feedfeal employment tax returns?  3 b. If a tile set one is reported on line 2a, did the organization file all required feedfeal employment tax returns?  3 b. If a tile set one is reported on line 2a, did the organization file all required feedfeal employment tax returns?  3 b. If the organization have unrelated businesses gross income of \$1,000 or more during the year?  3 b. If Yes, 1 and file of a file of profit of the year? If Who, 1 for the 3b, provide an explanation in Schedule O  4 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 accounts?  5 b. If Yes, 1 enter the name of the foreign country.  5 b. Ordan in the state of the organization file from 114, Report of Foreign Bank and Financial Accounts (FBAR).  5 b. Was the organization a parity to a prohibited tax shelter transaction?  6 b. Ordan in the state of the organization file from 114, Report of Foreign Bank and Financial Accounts (FBAR).  5 b. Ordan in the state organization and a party to a prohibited tax shelter transaction?  6 b. Ordan in the state of the organization file from 114, Report of Foreign Bank and Financial Accounts (FBAR).  5 b. Ordan in the state of the organization file from 114, Report of Foreign Bank and Financial Accounts (FBAR).  5 b. Ordan in the state of the organization file from 114, Report of Foreign Bank and Financial Accounts (FBAR).  5 b. Ordan in the stat				Yes	No
Country of the organization comply with backup withholding nulses for reportable payments to vendors and reportable gaming (gamining) without payments to revende you with meaning the payments to vendors and reportable gaming (gamining) without payments are true.  2 Enter the number of employees reported on Form W.3. Transmittal of Wage and Tax Statements, filled for the calendar year ending with or within the year covered by the return.  3 If all the state of the state of the payment of the payment of the payment that is a state of the payment of the organization have an interest in or a spinature or other authority over, a financial account in a foreign country (such as a bank account, socurities account, or other financial account)?  4 At any time the name of the foreign country to guch as a bank account, socurities account, or other financial account;?  5 If 'Yes, ' to line Sa or Sb, did the organization have an interest in, or a separature or other authority over, a financial account in a foreign country (such as a bank account, socurities account, or other financial account;?  5 Was the organization along the foreign country.  5 See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAF).  5 Was the organization and the organization file Form 8886-17?  5 Did any taxable party notify the organization file Form 8886-17?  5 Did any taxable party notify the organization file Form 8886-17?  6 Does the organization and part and gross receipts that are normally greater than \$100,000, and did the organization reverse in the view of the payment and the organization file form 100 or organization and partly for goods and services provided to the payment in excess of \$15 made partly as a contribution and partly for goods and services provided to the payment in excess of \$15 made partly as a contribution and partly for goods and services provided to the file form 8682?  6 Did the organizati	1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	?[		
distribution to prize winners?  2 Enter the number of employees reported on Form W3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return  3 b If at least one is reported on the 2a, did the organization file all required federal employment tax returns?  Note. If the sum of lines Is all and 2a is greater than 250, you may be required to e-file (see instructions)  3a D dit he organization have unrelated business gross income of \$1,000 or more during the year?  3a If If Yes, 1 and a filed a Form 990-F1 for this year? If No, 1 oil and 2b, provide an explanation in Schedule O  3b If Yes, and a filed a Form 990-F1 for this year? If No, 1 oil and 2b, provide an explanation in Schedule O  3c If Yes, 1 one to file of the organization flow a bank account, 2 purposed an explanation in Schedule O  3c If Yes, 1 one for 5th, of the organization have an interest in, or a signature or other authority over, a financial account if a foreign country; If No, 1 oil and 2b, provide an explanation in Schedule O  3c If Yes, 1 one for 5th, of the organization flow as bank account, securities account, or other financial accounts (FBAR).  5c If Yes, 1 one for 5th, of the organization flow as bank account, securities account, or other financial accounts (FBAR).  5c If Yes, 1 one for 5th, of the organization flow as bank account, securities and a promise flow organization and provide an explanation and promise flow organization solicid any contributions that were not tax deductible Form 88861.  5c If Yes, 1 one for 5th of the organization flow the very solicitation an express statement that such contributions or grits were not tax deductible or tax deductible as charitable contributions.  5c If Yes, 1 of the organization notify the chorn of the value of the goods or services provided?  5c D If the organization receive a payment in excess of \$75 made partly as a contribution and partly (1) goods and services provided to the payor?  5d D If Yes, 1 and the organization noti	b	Enter the number of Forms W-2G included in line 1a Enter -0- if not applicable 1b (			
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  by 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)  3 bill the organization have unreliated business gross income of \$1,000 or more during the yeal?  3 bill Y'es, 1 has it filed a Form 990-T for this year? If 'No, 1 or line 3b, provide an explanation in Schedule 0  3 bill Y'es, 1 has it filed a Form 990-T for this year? If 'No, 1 or line 3b, provide an explanation in Schedule 0  3 bill Y'es, 1 or the hearm of this foreign country; ►  5 bill Y'es, 1 or the hearm of this foreign country; ►  5 ce instructions for filing requirements for FireCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).  5 bill Y'es, 1 or line 5 are 5b, did the organization file form 8888 17  5 cill Y'es, 1 to line 5 are 5b, did the organization file form 8888 17  5 cill Y'es, 1 or line 5 are 5b, did the organization file form 8888 17  6 cill Y'es, 1 or line 5 are 5b, did the organization file form 8888 17  6 cill Y'es, 1 or line 5 are 5b, did the organization file form 8888 17  6 cill Y'es, 1 or line or 1 the common struction or 1 the second stru	С	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming	]		
field for the calendary year ending with or within the year covered by the return		(gambling) winnings to prize winners?	1c		
b If a least one is reported on line 2a, did the organization file all required foderal employment tax returns?  Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-lie (see instructions).  3a Did the organization have unrelated business gross income of \$1,000 or more during the year?  3b If "Yes," has if filed a form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O  3b A 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 A any time the name of the foreign country: Ph See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAF).  5b If "Yes," to line 5a or 5b, did the organization that it was or is a party to a prohibited tax shelter transaction?  5c If "Yes," to line 5a or 5b, did the organization that it was or is a party to a prohibited tax shelter transaction at any contributions in party to a prohibited tax shelter transaction at any contributions in the time with the organization include with every solicitation an express statement that such contributions or gifts were not tax deductable as charitable contributions?  bif "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductable?  Organizations that may receive deductible contributions under section 170(c).  bif the organization receive a payment in excess of \$75 made party as a contribution and party for goods and services provided to the payor?  bif "Yes," did the organization notify the donor of the value of the goods or services provided?  bif the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  fig. If the organization in excess any funds, directly or indirectly, to pay premiums on a personal benefit contract?  fig. If the or	2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,			
Note, if the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) 3		filed for the calendar year ending with or within the year covered by this return 2a 2a			
3a   3b   1f Yes, 'has if field a Form 990-T for this year? If 'No, 'to line 3b, provide an explanation in Schedule O   3b   3b   3b   3b   3b   3b   3b	b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	X	
b if Yes, has a field a Form 990-T for the year? If Yes, 'to line 3b, provide an explanation in Schedule O 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  b if Yes, 'enter the name of the foreign country: IP See instructions for filing requirements for FinceINF form 114, Report of Foreign Bank and Financial Accounts (FBAR).  5b Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5c If Yes, 'to line 5a or 5b, did the organization file Form 8886-T?  6b Dod any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  6c If Yes, 'to line 5a or 5b, did the organization file Form 8886-T?  6c Dos the organization have annual giose receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?  6c Did the organization have annual giose receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?  6c Did the organization receive a payment in exciss of \$5' make party to a contribution or grits were not tax deductible?  6c Did the organization receive a payment in exciss of \$5' make party to a contribution or grits or the organization start may receive deductible contributions under section 170(c).  6c Did the organization start may receive deductible contributions under section 170(c).  6c Did the organization start may receive deductible contributions or the value of the goods or services provided?  7b Did the organization neture a payment in exciss of \$5' make payor to the value of the goods or services provided?  7c Did the organization neture of Forms 8282 filed during the year  7c Did the organization neture and payor thanks directly or indirectly, to pay premiums on a personal benefit contr		Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			
4a All 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??  See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).  Sa Was the organization party to a prohibited tax shelter transaction at any time during the tax year?  50 bid any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  61 f1 Yes, it of 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?  62 bif 1 Yes, it did the organization include with every solicitation an express statement that such contributions or grits were not tax deductible?  63 organization start may receive deductible contributions under section 170(c).  64 bif the organization receive a payment in excess of \$75 made party as a contribution and partly for goods and services provided?  75 bif Yes, indicate the number of Forms 8282 filed during the year of the organization of Foreign and the party of the organization receive and contribution and party for goods and services provided?  76 bif the organization receive and purpose of tangelie personal property for which it was required to file Form 8282?  77 bif Yes, indicate the number of Forms 8282 filed during the year  78 bif the organization during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  79 bif the organization during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  79 fif the organization received a contribution of qualified intellectual property, did the organization file Form 8993 as required?  79 fif the organization received a contribution of qualified intellectual property, did the organization file	За	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a		X
financial account in a foreign country (such as a bank account, securities account, or other financial account)?  b if "Yes," enter the name of the foreign country:  See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAF).  Sa Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5a Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  5b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  5c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?  6a Des 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 charables contributions?  5c If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  7c Organizations that may receive deductible contributions under section 170(c).  8d If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  7c Organization shall may receive deductible contributions under section 170(c).  8d If "Yes," did the organization increave a payment in excess of \$55 make party as a contribution and party for goods and services provided?  7d Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8822?  8d If "Yes," indicate the number of Forms 8282 filed during the year or personal benefit contract?  9d If the organization received a contribution of qualified intellectual property, did the organization file a Form 1098-C?  9d If "Yes, "did the organization make a distribution of advised funds.  9d Did the organization file a Form 1098-C?  9d Sponsoring organization is maintaining domor advised funds.  9d Did t	b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O	3b		
b if Y'es, enter the name of the foreign country. ► See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).  5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5b Did any taxable party notify the organization file form 8886-17?  6c If Y'es's. Io line 5a or 5b, did the organization file form 8886-17?  6d 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?  6d If Y'es', did the organization include with very solicitation an express statement that such contributions or gifts were not tax deductible?  7 Organizations that may receive deductible contributions under section 170(c).  8 Did the organization that may receive deductible contributions under section 170(c).  9 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?  7b If Y'es', did the organization notify the donor of the value of the goods or services provided?  7b If Y'es', 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?  7b If Y'es', did the organization receive any funds, directly or indirectly, or pay premiums on a personal benefit contract?  7c If If the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  7c If the organization received a contribution of qualified intellicular property, did the organization file Form 899 as required?  7n If the organization received a contribution of qualified intellicular property, did the organization file Form 899 as required?  7n If the organization file Form 899 as required?  7n If the organization file Form 899 as required?  7n If the organization file Form 899 as required?  7n If the organization file Form 890 and the prope	4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a			
See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).  5a Was the originatization a party to a prohibited fax shelter transaction at any time during the tax year?  5b Did any taxable party notify the originaziation that it was or is a party to a prohibited fax shelter transaction?  5c If 'Yes,' to line 5a or 5b, did the originaziation file Form 8886-T7  5b Does the originaziation have annual gross receipts that are normally greater than \$100,000, and did the originaziation solicit any contributions that were not tax deductible as charitable contributions?  5c Does the originaziation include with every solicitation an express statement that such contributions or girts were not tax deductible; as charitable contributions under section 170(c).  5c Did the originaziation include with every solicitation an express statement that such contributions or girts were not tax deductible?  7c Originaziations that may receive deductible contributions under section 170(c).  8d If 'Yes,' did the originaziation include with every shelp as a contribution and partly for goods and services provided to the payor?  7a bif the originaziation sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8222?  7a bif the originaziation sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8222.  7b Did the originaziation dimplified intellectual property, did the originaziation file Form 8229.  7f If the originaziation received a contribution of qualified intellectual property, did the originaziation file Form 8289 as required?  7f If the originaziation sell, exchange premiums, directly or indirectly, to a personal benefit contract?  7g If the originaziation sell, given the payor premiums on a personal benefit contract?  7f If the originaziation received a contribution of qualified intellectual property, did the originaziation file Form 8299 as required?  7g If the originaziation		financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		X
5a Was the organization a parry to a prohibited tax shelter transaction at any time during the tax year?  5 Did any taxable parry notify the organization that it was or is a parry to a prohibited tax shelter transaction?  5 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?  6 If Yes, did the organization include with every solicitation an express statement that such contributions or grits were not tax deductible?  5 Did the organizations that may receive deductible contributions under section 170(c).  5 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?  5 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?  5 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?  5 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?  5 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?  5 Did the organization neceive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?  5 Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7 Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7 Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7 Did the organization received a contribution of cars, boats, arplaines, or other vehicles, did the organization file a Form 1098-C?  8 Sponsoring organization received	b	If "Yes," enter the name of the foreign country: ▶		i	
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  6 If "Yes," to line 5a or 5b, did the organization file Form 888617?  50 Boes 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?  6 If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  7 Organizations that may receive deductible contributions under section 170(c).  8 Did the organization servers a payment in excess of \$15 made party as a contribution and party for goods and services provided to the payor?  9 Did the organization notify the donor of the value of the goods or services provided?  10 Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  10 Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  11 Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  12 Did the organization neceived a contribution of qualified intellectual property, did the organization file a Form 1098-C?  13 Sponsoring organizations maintaining donor advised funds, Did a donor advised fund maintained by the sponsoring organization make any taxable distributions under section 4966?  13 Sponsoring organization make a distribution to a donor, donor advised funds, a Did the sponsoring organization make a distribution to a donor, donor advised funds.  10 Did the sponsoring organization make a distribution to a donor, donor advised funds.  10 Did the sponsoring organization make a distribution to a donor, donor advised funds.  10 Did the sponsoring organization make a distribution to a donor, donor advised funds.  10 Did the sponsoring organization make any taxable distributions under section 4966?  11 S		See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
c if "Yes," to line 5a or 5b, did the organization file Form 8886-T7  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 1ax deductible as charitable contributions?  b if "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  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?  b if "Yes," did the organization notify the donor of the value of the goods or services provided?  C Did the organization self, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d if "Yes," did the unimber of Forms 8282 filed during the year  Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  10 If the organization received a contribution of qualified intellectual property, did the organization file a Form 1098-C?  5 Sponsoring organizations maintaining donor advised funds.  Did the sponsoring organizations maintaining donor advised funds.  Did the sponsoring organization make any taxable distributions under section 4966?  Did the sponsoring organization make a distribution to a donor, donor advised, or related person?  Section 501(c)(7) organizations. Enter initiation fees and capital contributions included on Part VIII, line 12  Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 501(c)(2) organizations. Enter initiation fees and capital contributions included on Part VIII, line 12  Gross income from methers or shareholders  Gross income from methers or shareholders in the surface of the success of the success of the organization levels of the success of the success of the succe	5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
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 charifable contributions?  6a  6b  6b  6c  6b  6c  6c  6c  6c  6c  6c	b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		X
any contributions that were not tax deductible as charitable contributions?  b if "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  7 Organizations that may receive deductible contributions under section 170(c).  a bid the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?  5 if "Yes," did the organization notify the donor of the value of the goods or services provided?  C bid the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d if "Yes," indicate the number of Forms 8282 filed during the year  e bid the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f bid the organization, during the year, pay premiums, directly, or a personal benefit contract?  g if the organization received a contribution of qualified intellectual property, did the organization file a Form 1098-C?  Sponsoring organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  Sponsoring organization have excess business holdings at any time during the year?  9 Sponsoring organization maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization make any taxable distributions under section 4966?  Did the sponsoring organization make any taxable distributions under section 4966?  9 a Did the sponsoring organization make any taxable distributions in the section 501(c)/10 organizations. Enter a Initiation fees and capital contributions included on Part VIII, line 12  Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  Gross income from members or shareholders.  Gross income from members or shareholders.  Gross income from members or shareholders in surrous discusers.  13a Section 501(c)/20 organizations. En	C	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c		
b if "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  Organizations that may receive deductible contributions under section 170(c).  In the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?  If "Yes," did the organization notify the donor of the value of the goods or services provided?  Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  If "Yes," indicate the number of Forms 8282 filed during the year  Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  The payment of the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If the organization received a contribution of carls, boats, amplianes, or other vehicles, did the organization file a Form 1098 C?  Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?  Sponsoring organizations maintaining donor advised funds.  Did the sponsoring organization make any taxable distributions under section 4966?  De the sponsoring organization make any taxable distributions under section 4966?  De the sponsoring organization make any taxable distributions under section 4966?  De Section 501(c)(2) organizations. Enter:  Initiation fees and capital contributions included on Part VIII, line 12  Gross receipts, included on Form 990, Part VIII, line 12  Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)  Section 501(c)(2) organizations. Enter:  Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)  Section 501(c)(2) qualified nonprofit health insur	6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit			
were not tax deductible?  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?  7 a   7   7   7   7   7   7   7   7   7		any contributions that were not tax deductible as charitable contributions?	6a		X
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? 7b bif *Yes*,* did the organization notify the donor of the value of the goods or services provided?  C Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  A dif *Yes*,* indicate the number of Forms 8282 filed during the year  Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7c dif *Yes*,* inside the number of Forms 8282 filed during the year  Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7c dif *Yes*,* has it filed a Form 7890 payments.*  7d   7d   7d   7d   7d   7d   7d   7d	b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts			
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?  b if "Yes," did the organization notify the donor of the value of the goods or services provided?  C Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d if "Yes," indicate the number of Forms 8282 filed during the year  Did the organization, during the year, pay premiums, directly, to pay premiums on a personal benefit contract?  7c  7d  7d  7e  7d  7e  7d  7e  7d  7e  7d  7e  7e		were not tax deductible?	6b		
b If "Yes," did the organization notify the donor of the value of the goods or services provided?  c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d If "Yes," indicate the number of Forms 8282 filed during the year  e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organizations maintaining donor advised funds.  Did the sponsoring organization make any taxable distributions under section 4966?  b Did the sponsoring organization make any taxable distributions under section 4966?  b Did the sponsoring organization make any taxable distributions under section 4966?  9a  b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  Section 501(c)(7) organizations. Enter  a Initiation fees and capital contributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  b Gross income from members or shareholders  b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  11a  12b  Section 501(c)(2) organizations. Enter:  a Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  11b  11c  11c  11c  11c  11d  11d  11d	7	Organizations that may receive deductible contributions under section 170(c).			
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  7c	а	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a		X
to file Form 8262?  d if "Yes," indicate the number of Forms 8282 filed during the year  Did the organization receive any funds, directly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly, on a personal benefit contract?  g if the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?  Sponsoring organizations maintaining donor advised funds.  a Did the sponsoring organization make any taxable distributions under section 4966?  9a  b Did the sponsoring organization make any taxable distributions under section 4966?  9b  D did the sponsoring organization make any taxable distributions under section 4966?  Section 501(c)(7) organizations. Enter:  a Initiation fees and capital contributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12  a Gross income from members or shareholders  a Gross income from members or shareholders  b Gross income from themsources (Do not net amounts due or paid to other sources against amounts due or received from them.)  2a Section 4947(a)(1) non-exempt charitable trusts, is the organization filing Form 990 in lieu of Form 1041?  b If "Yes," enter the amount of tax-exempt interest received or accrued during the year  12a  13a Section 501(c)(29) qualified nonprofit health insurance issuers.  a is the organization incensed to issue qualified health plans in more than one state?  Note, See the instructions for additional information the organization must report on Schedule O.  b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issu	ь	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
d if "Yes," indicate the number of Forms 8282 filed duning the year  Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, duning the year, pay premiums, directly, on a personal benefit contract?  f If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  If the organization received a contribution of qualified intellectual property, did the organization file a Form 1098-C?  8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organizations maintaining donor advised funds.  a Did the sponsoring organization make any taxable distributions under section 4966?  b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  Section 501(c)(7) organizations. Enter  a Initiation fees and capital contributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  11a  B Gross income from members or shareholders  Gross income from members or shareholders  In the sponsoring organizations. Enter:  a Gross income from them.)  12a  Section 501(c)(12) organizations. Enter:  a Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12b  If "Yes," enter the amount of tax-exempt interest received or accrued during the year  12b  If "Yes," enter the amount of tax-exempt interest received or accrued during the year  13a  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.  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  Enter the amount of reserves on hand  13c  It a Did the organization is feed to the po	С	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required		ĺ	
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f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  g if the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  h if the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?  9 Sponsoring organizations maintaining donor advised funds.  a Did the sponsoring organization make any taxable distributions under section 4966?  b Did the sponsoring organization make any taxable distributions under section 4966?  9a John the sponsoring organization make any taxable distributions under section 4966?  9b Did the sponsoring organization make any taxable distributions under section 4966?  9c Did the sponsoring organization make any taxable distributions under section 4966?  9b Did the sponsoring organization in make any taxable distributions under section 4966?  9c Did the sponsoring organization in make any taxable distributions under section 4966?  9c Did the sponsoring organization included on Part VIII, line 12  10a	đ	<del>,</del> , , , , , , , , , , , , , , , , , ,			
g if the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  h if the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organizations maintaining donor advised funds.  9 Sponsoring organizations maintaining donor advised funds.  a Did the sponsoring organization make any taxable distributions under section 4966?  b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  9b Did the sponsoring organizations. Enter:  a linitiation fees and capital contributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  10b Did  9c Section 501(c)(12) organizations. Enter:  a Gross income from members or shareholders  b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  12b If "Yes," enter the amount of tax-exempt interest received or accrued during the year  13b 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.  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  Enter the amount of reserves on hand  13c Enter the amount of reserves on hand  14a Did the organization receive any payments for indoor tanning services during the tax year?  14a If Yes, has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	е	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		<u>X</u>
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?  9 Sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organization make any taxable distributions under section 4966?  9 Did the sponsoring organizations. Enter  a Intiation fees and capital contributions included on Part VIII, line 12  10 Did the sponsoring organizations. Enter:  a Gross receipts, included on Form 99.0 Part VIII, line 12  11 Did Did Total Section 501(c)(12) organizations. Enter:  a Gross income from embers or shareholders  11 Did Did Total Di	f		7f		X
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b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O			140		х
					41
	<u> </u>	in 190, has a nice a remit 20 to report these payments. If 190, provide an explanation in scriedule of		990 /	2014

Form 990 (2014) VALUES IN ACTION INSTITUTE 31–1663243 Page

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

	to line ba, bb, or rob below, describe the circumstances, processes, or charges in schedule of see instructions.			
	Check if Schedule O contains a response or note to any line in this Part VI			X
Sec	tion 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 6	-		
	If there are material differences in voting rights among members of the governing body, or if the governing		İ	
	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			
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	X	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision			
Ū	of officers, directors, or trustees, or key employees to a management company or other person?	3		Х
	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	<u> </u>	X
4				X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6	Did the organization have members or stockholders?	6		
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		X
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		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
а	The governing body?	8a	X	
b	Each committee with authority to act on behalf of the governing body?	8b	X	İ
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	X	
Sec	tion 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		Х
	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,	,0u		
U	and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
44-			X	
	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Λ	
	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			<b>.</b>
	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a		X
	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b		
С	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe			
	ın Schedule O how this was done	12c		
13	Did the organization have a written whistleblower policy?	13		_X
14	Did the organization have a written document retention and destruction policy?	14		X
15	Did the process for determining compensation of the following persons include a review and approval by independent			
	persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
а	The organization's CEO, Executive Director, or top management official	15a		X
b	Other officers or key employees of the organization	15b		X
	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			
· - u	taxable entity during the year?	16a		X
ь	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation			
D	in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's			
		46h		
800	exempt status with respect to such arrangements?	16b_		
	tion C. Disclosure  List the states with which a copy of this Form 990 is required to be filed ▶OH			
17		voilak	lo.	
18	Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) a	validi	ic.	
	for public inspection. Indicate how you made these available. Check all that apply.			
	Own website Another's website X 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	finan	cial	
	statements available to the public during the tax year.			
20	State the name, address, and telephone number of the person who possesses the organization's books and records:			
	MAUREEN HECKMULLER - (513) 621-7500			
	312 WALNUT STREET, SUITE 3600, CINCINNATI, OH 45202			

### Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

 $\mathbf{x}$ 

### 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, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

(A) Name and Title	(B) Average hours per week	(C) Position (do not check more than box, unless person is bot officer and a director/trus				than	h an	(D) Reportable compensation from	(E)  Reportable  compensation  from related	(F) Estimated amount of other
	(list any hours for related organizations below line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	the organization (W-2/1099-MISC)	organizations (W-2/1099-MISC)	compensation from the organization and related organizations
(1) NEAL H. MAYERSON, PH.D.	15.00								455 064	
PRESIDENT/TRUSTEE	10.00	X		X				0.	175,264.	0
(2) DONNA MAYERSON, PH.D.	10.00									
SECRETARY/TREASURER/TRUSTE	20.00	X		X	_	├_	ļ	0.	0.	0
(3) BRETA C. COOPER	20.00								160 000	•
TRUSTEE	0.50	X				<del> </del> -	<b></b>	0.	168,029.	0
(4) SEAN SLOVENSKI	0.50	7.							0	0
TRUSTEE	0.50	Х				<u> </u>		0.	0.	0
(5) JAY SHARP	0.50				l					•
TRUSTEE	0.50	X				<u> </u>		0.	0.	0
(6) TED MARTIN	0.50	x						0.	0.	0 .
TRUSTEE										
										·
									• .	

31-1663243

rai	t VII   Section A. Officers, Directors, Trus (A)	tees, Key Em (B)							Compensated Employe (D)	es (continued) (E)		(F)	
	Name and title	Average	Position (do not check more than on						Reportable	Reportable		Estima	
		hours per week	box	, unle	ss pe	erson	is bot or/trus	h an	· ·	compensation		amour	
		(list any						,,	from the	from related organizations		othe compen	
		hours for	Individual trustee or director	, s		Ì	aled		organization	(W-2/1099-MIS	C)	from	the
		related organizations	rustee	Truste		8	npens		(W-2/1099-MISC)			organiz and rel	
		below	d land	Institutional trustee	<b>a</b>	Key employee	Highest compensated employee	   <u> </u>				organiza	
		line)	Į pul	Instr	Officer	Key	돌림	를					
										!			
						-	-				_		
					-					.,			
						-							
							<u> </u>						
							_	_			$\perp$		
1b	Sub-total							<b>&gt;</b>	0.	343,29			0.
	Total from continuation sheets to Part VI	I, Section A		-	•••				0.		0.		<u>0.</u>
<u>d</u> 2	Total (add lines 1b and 1c)  Total number of individuals (including but n	ot limited to th		liete	d al	hove	2) vvt	10 r	0.	343,29			0.
	compensation from the organization	ot invited to the								,ood or repertable			0
_	5			. 1		1 -					-	Yes	No
3	Did the organization list any former officer, line 1a? If "Yes," complete Schedule J for s		ISTE	е, ке	y en	пріс	yee,	or i	nignest compensated ei	mployee on		3	х
4	For any individual listed on line 1a, is the su		e co	mpe	ensa	ation	anc	i oti	her compensation from	the organization			
	and related organizations greater than \$150									• •	<u> </u>	4 X	
5	Did any person listed on line 1a receive or a					_		elat	ed organization or indivi	dual for services		5	x
Sec	rendered to the organization? If "Yes," com tion B. Independent Contractors	ріете Scпеаию	3 J 10	or su	icn j	pers	SON			-		<u> </u>	<u> </u>
1	Complete this table for your five highest co										ensatio	on from	
	the organization. Report compensation for	the calendar ye	ear e	endii	ng w	vith	or w	ithir 		/ear.		(C)	
	(A) Name and business	address	NC	NI	3				(B)  Description of s	ervices	Corr	npensat	ion
								1					
		· · · · · · · · · · · · · · · · · · ·						_				<del></del>	
								ŀ					
								$\dashv$			·		
2	Total number of independent contractors (i \$100,000 of compensation from the organic		ot lir	nrte	d to		se lis )	sted	above) who received m	nore than			
	T. D. JOSE C. COMPONICATION NO OF GRAND								·		Fo	m <b>99</b> 0	(2014)

Form 990 (2014)
Part VIII S

		Check if Schedule O conf	tains a response	e or note to any lin	e in this Part VIII			<u> </u>
				-	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
ts	1 a	Federated campaigns	. 1a					
ran		Membership dues	1b					
SE S		Fundraising events	1c					
ar /		Related organizations	1d	27,600.				
s, G		Government grants (contribut						
ion		All other contributions, gifts, gran			-			
per la	•	similar amounts not included abo	1 1	463.				
Öğ	a	Noncash contributions included in lines						7
Contributions, Gifts, Grants and Other Similar Amounts	_	Total. Add lines 1a-1f		▶	28,063.			
				Business Code	•			
e e	2 a	CHARACTER STREN	IGTH	541700	550,730.	550,730.		
Program Service Revenue		TRAINING				•		
Se	С							
e am	d							
Pα	e							
ፈ	f	All other program service reve	enue					1
		Total. Add lines 2a-2f		<b>•</b>	550,730.			
	3	Investment income (including	dıvıdends, ınter	est, and				
Ì		other similar amounts)		▶ 📗	9,447.			9,447.
	4	Income from investment of tax			_			
	5	Royalties		<b>&gt;</b>	14,345.			14,345.
			(i) Real	(ii) Personal				
	6 a	Gross rents						
	ь	Less. rental expenses						
	С	Rental income or (loss)						
ĺ	d	Net rental income or (loss)		<b>&gt;</b>				
	7 a	Gross amount from sales of	(i) Securities	(ii) Other				
		assets other than inventory	29,044.					
	ь	Less cost or other basis						
		and sales expenses	24,395.	,				
-	С	Gain or (loss)	4,649.					
	d	Net gain or (loss)			4,649.			4,649.
e l	8 a	Gross income from fundraising	g events (not					
		including \$	of					
ě		contributions reported on line						
Other Rever		Part IV, line 18	a	.[				
	b		Ь	,[]				
٥	С	Net income or (loss) from fund						
1	9 a	Gross income from gaming ac	tivities See					-
1		Part IV, line 19	a					
ł	b	Less direct expenses	b					
	С	Net income or (loss) from gam	ing activities .					
		Gross sales of inventory, less						
- 1		and allowances	. a	1	-			
1	ь	Less: cost of goods sold	ь	,				
Į	С	Net income or (loss) from sales	s of inventory					
l		Miscellaneous Revenue	е	<b>Business Code</b>				
	11 a							
	b							
	С							
	d	All other revenue						
	е	Total. Add lines 11a-11d		<del>.</del> .				
	12	Total revenue. See instructions.		▶	607,234.	550,730.	0 .	28,441.

### 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 or note to any line in this Part IX (B) Program service (D) Fundraising (A) Total expenses Do not include amounts reported on lines 6b. Management and 7b, 8b, 9b, and 10b of Part VIII. expenses general expenses expenses Grants and other assistance to domestic organizations 1 and domestic governments. See Part IV, line 21 Grants and other assistance to domestic individuals. See Part IV, line 22 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 Benefits paid to or for members . . . . Compensation of current officers, directors, 20,000. 20,000 trustees, and key employees Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) 138,305. 138,305. Other salaries and wages Pension plan accruals and contributions (include 4,486. 4,486. section 401(k) and 403(b) employer contributions) 4,280. 4,280. Other employee benefits . . 11,957. 11,957. Payroll taxes 10 Fees for services (non-employees): a Management 7,918. 7,918. Legal 5,000. 5,000 c Accounting d Lobbying Professional fundraising services. See Part IV, line 17 Investment management fees Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.) 53,523. 53,523 Advertising and promotion 12 6,567. 6,567. Office expenses 13 2,373 2,373 14 Information technology Royalties 15 Occupancy 16 3,460 3,460. 17 Travel Payments of travel or entertainment expenses for any federal, state, or local public officials 6,029 6,029 Conferences, conventions, and meetings .... 19 Interest .... 20 Payments to affiliates 21 474 474 Depreciation, depletion, and amortization 22 1,365. 1,365. 23 insurance 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 0.) WEBSITE/SURVEY/MEASUREM 155,925. 155,925. 140,210. 140,210. ь RESEARCH 17,538. 17,538. c BANK CHARGES 16,000. 16,000. d CONSULTING FEES 20,237. 3,293. 23,530. e All other expenses 618,940. 574,886. 44,054. 0. Total functional expenses. Add lines 1 through 24e 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 ff following SOP 98-2 (ASC 958-720)

<u>t X</u> _	Balance Sheet					
	Check if Schedule O contains a response or no	te to an	line in this Part X			<u> </u>
				(A) Beginning of year		(B) End of year
1	Cash - non-interest-bearing			9,408.	1	70,330
2	Savings and temporary cash investments		[	566,256.	2	0
3					3	
		•			4	
	•	ormer of	icers, directors.			
•						
			,		5	
6	•	ified per	sons (as defined under			
O	•		· .	-		
					_	
_	· ·	. Compi	te Fait II OF SCITE.	27 372		9,890
	• • • •			41,314.		<u> </u>
	• • • • • •					
_		1 1	· · · · ·		9	
10a	_	1 }	700			
	• • • • • • • • • • • • • • • • • • • •			•		215
þ		106	4/4.	U •		315 509,937
11	· -					
12	·	· · ·	1.		1	
13					<u> </u>	
14						
15	Other assets See Part IV, line 11	•				
16	Total assets. Add lines 1 through 15 (must equ	al line 3	·)	603,037.		590,473
17	Accounts payable and accrued expenses				17	
18	Grants payable		18			
19	Deferred revenue				19	
20	Tax-exempt bond liabilities				20	
21	Escrow or custodial account liability Complete	Part IV o	f Schedule D		21_	
22	Loans and other payables to current and former	r officers	, directors, trustees,			
	key employees, highest compensated employee	es, and	lisqualified persons.			
	Complete Part II of Schedule L				22	
23	Secured mortgages and notes payable to unrela	ated thir	d parties .		23	
24	Unsecured notes and loans payable to unrelate	d third p	arties .		24	
25	Other liabilities (including federal income tax, pa	yables t	related third			
	parties, and other liabilities not included on lines	s 17-24).	Complete Part X of			
	Schedule D			1,340.	25	482
26	Total liabilities. Add lines 17 through 25			1,340.	26	482
	Organizations that follow SFAS 117 (ASC 958	3), chec	here 🕨 🔲 and			
	complete lines 27 through 29, and lines 33 and	ıd 34.				-
27	Unrestricted net assets				27	
28	Temporarily restricted net assets				28	
29	Permanently restricted net assets				29	
	•					
						,
30				0.	30	0
			Į.	0.	31	0
32	-			601,697.		589,991
	<del>-</del>		· · F	601,697.	33	589,991
33	Total net assets or fund balances		ī	ו. ועמ. דטם	333	303.331.
	1 2 3 4 5 6 6 7 8 9 10a b 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Check if Schedule O contains a response or not Check if Schedule O contains a response or not Cash - non-interest-bearing  Savings and temporary cash investments  Piedges and grants receivable, net  Accounts receivable, net  Loans and other receivables from current and fit trustees, key employees, and highest compens Part II of Schedule L  Loans and other receivables from other disqual section 4958(f)(1)), persons described in section employers and sponsoring organizations of sec employees' beneficiary organizations (see instr)  Notes and loans receivable, net  Inventiones for sale or use  Prepaid expenses and deferred charges  Land, buildings, and equipment, cost or other basis. Complete Part VI of Schedule D  b Less accumulated depreciation  Investments - publicly traded securities  Investments - other securities. See Part IV, line  Intangible assets  Other assets See Part IV, line 11  Total assets. Add lines 1 through 15 (must equity accounts payable and accrued expenses  Grants payable  Deferred revenue  Tax-exempt bond liabilities  Escrow or custodial account liability Complete  Loans and other payables to current and forme key employees, highest compensated employer Complete Part II of Schedule L  Secured mortgages and notes payable to unrelate  Other liabilities (including federal income tax, paparties, and other liabilities not included on lines Schedule D  Total liabilities. Add lines 17 through 25  Organizations that follow SFAS 117 (ASC 956 complete lines 27 through 29, and lines 33 ar  Unrestricted net assets  Permanently restricted net assets  Organizations that do not follow SFAS 117 (Asc 956 complete lines 27 through 29, and lines 33 ar  Unrestricted net assets  Organizations that do not follow SFAS 117 (Asc 956 complete lines 27 through 29, and lines 33 ar  Unrestricted net assets  Organizations that do not follow SFAS 117 (Asc 956 complete lines 27 through 29, and lines 33 ar	1 Cash · non-interest-bearing 2 Savings and temporary cash investments 3 Piedges and grants receivable, net 4 Accounts receivable, net 5 Loans and other receivables from current and former off trustees, key employees, and highest compensated empart II of Schedule L 6 Loans and other receivables from other disqualified persection 4958(f)(1)), persons described in section 4958(c) employers and sponsoring organizations of section 501(employees' beneficiary organizations (see instr). Complet Notes and loans receivable, net 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Land, buildings, and equipment. cost or other basis. Complete Part VI of Schedule D 10a b Less accumulated depreciation 11 Investments · publicly traded securities 12 Investments · other securities. See Part IV, line 11 13 Investments · program-related. See Part IV, line 11 14 Intangible assets 15 Other assets See Part IV, line 11 16 Total assets. Add lines 1 through 15 (must equal line 34) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 20 Tax-exempt bond liabilities 21 Escrow or custodial account liability Complete Part IV of Complete Part II of Schedule L 23 Secured mortgages and notes payable to unrelated third pother liabilities (including federal income tax, payables to parties, and other payables to current and former officers key employees, highest compensated employees, and of Complete Part II of Schedule L 25 Organizations that follow SFAS 117 (ASC 958), check complete lines 27 through 29, and lines 33 and 34.  10 Unrestricted net assets 10 Tental ilabilities. Add lines 17 through 25 11 Organizations that do not follow SFAS 117 (ASC 958) and complete lines 30 through 34.  12 Capital stock or trust principal, or current funds 11 Pad-in or capital surplus, or land, building, or equipment	1 Cash · non-interest-bearing 2 Savings and temporary cash investments 3 Piedges and grants receivable, net 4 Accounts receivable, net 5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L 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 instr). Complete Part II of Sch L 7 Notes and loans receivable, net 8 Inventories for sale or use 9 Prepaid expenses and deferred charges 10a Land, buildings, and equipment, cost or other basis. Complete Part VI of Schedule D 10a 789 • b Less accumulated depreciation 11 Investments · publicity traded securities 11 Investments · publicity traded securities 12 Investments · other securities. See Part IV, line 11 13 Investments · program-related. See Part IV, line 11 14 Intrangible assets 16 Other assets See Part IV, line 11 17 Total assets. Add lines 1 through 15 (must equal line 34) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue 10 Taxexempt bond liabilities 11 Escrow or custodial account liability. Complete Part IV of Schedule D 12 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 19 Secured mortgages and notes payable to unrelated third parties 10 Cher liabilities (including federal income tax, payables to related third parties 10 Other liabilities. Add lines 17 through 25 11 Organizations that follow SFAS 117 (ASC 958), check here 1 and complete lines 27 through 29, and lines 33 and 34. 12 Unrestricted net assets 13 Fermanently restricted net assets 14 Permanently restricted net assets 15 Permanently restricted inet assets 16 Permanently restricted inet assets 17 Permanently restricte	Check if Schedule O contains a response or note to any line in this Part X    Cash - non-interest-bearing   9 , 408 .	Check if Schedule O contains a response or note to any line in this Part X    Reginning of year

For	n 990 (2014) VALUES IN ACTION INSTITUTE	31-1663	3243	Page <b>12</b>		
Pa	rt XI Reconciliation of Net Assets					
	Check if Schedule O contains a response or note to any line in this Part XI	<u> </u>				
1	Total revenue (must equal Part VIII, column (A), line 12)	1		<u>7,234.</u>		
2	Total expenses (must equal Part IX, column (A), line 25)	2		<u>8,940.</u>		
3	Revenue less expenses Subtract line 2 from line 1	3	<11,706			
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	60	1,697.		
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		<del></del>		
9	Other changes in net assets or fund balances (explain in Schedule O)	9		0.		
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33,					
	column (B))	10	58	<u>9,991.</u>		
Pa	rt XII Financial Statements and Reporting					
	Check if Schedule O contains a response or note to any line in this Part XII	····		<u></u>		
				Yes No		
1	Accounting method used to prepare the Form 990 X Cash Accrual Other					
	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule	О.		,		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		2a	X		
	If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed	on a		Ì		
	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	X		
	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		-			
С	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			
	If the organization changed either its oversight process or selection process during the tax year, explain in Sche	dule O				
За	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Sin	gle Audit				
	Act and OMB Circular A-133?		3a	X		
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required	ed audit				
	or audits, explain why in Schedule O and describe any steps taken to undergo such audits		3b			
			Form 9	990 (2014)		

#### **SCHEDULE A**

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

### **Public Charity Status and Public Support**

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

▶ Attach to Form 990 or Form 990-EZ.

OMB No 1545-0047

Open to Public Inspection

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990. Employer identification number Name of the organization 31-1663243 VALUES IN ACTION INSTITUTE Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions. Th

The	organ	zation is not a private found	lation because it is	(For lines 1 through 11,	check only	one box.)							
1		A church, convention of ch	urches, or associati	on of churches describe	d in sectio	on 170(b)(	1)(A)(i).						
2		A school described in secti	ion 170(b)(1)(A)(ii).	(Attach Schedule E.)									
3		A hospital or a cooperative			ection 170	)(b)(1)(A)(i	ii).						
4	百	A medical research organiz						the hospital's name,					
•		city, and state:		,				•					
5		An organization operated for	or the benefit of a co	ollege or university owne	d or opera	ted by a o	overnmental unit describ	ped in					
3		section 170(b)(1)(A)(iv). (C		onego or annocem, como	<sub> </sub>								
6		A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).											
6	X	An organization that norma	J				• •	nublic described in					
1	تما	-	-	artial part of its support	iioiii a gov	CHILICHIC	unit of nom the general	public described in					
_		section 170(b)(1)(A)(vi). (Complete Part II)											
8	=	A community trust describe						and arrang resources from					
9		An organization that norma											
		activities related to its exen											
		income and unrelated busin		e (less section 511 tax) fr	om busine	esses acqu	ired by the organization	aπer June 30, 1975.					
		See section 509(a)(2). (Cor											
10	$\vdash$	An organization organized a	•	•	-								
11		An organization organized a											
		more publicly supported or						check the box in					
	_	lines 11a through 11d that											
а		Type I. A supporting orga											
		the supported organization			a majority	of the dire	ctors or trustees of the s	supporting					
		organization. You must o	•										
b		Type II. A supporting org											
		control or management o	f the supporting org	janization vested in the s	same perso	ons that co	ontrol or manage the sup	ported					
		organization(s). You mus											
С		Type III functionally inte	grated. A supportin	ng organization operated	in connec	tion with, a	and functionally integrate	ed with,					
		its supported organization		•	· ·								
d		Type III non-functionally	_										
		that is not functionally int	egrated. The organi	zation generally must sa	tisfy a dist	ribution re	quirement and an attent	iveness					
		requirement (see instruct											
е		Check this box if the orga	anization received a	written determination fro	om the IRS	that it is a	Type I, Type II, Type III						
		functionally integrated, or	Type III non-function	onally integrated support	ing organi	zation							
f	Ente	r the number of supported o	organizations				··· ·	. L					
g	Prov	ide the following information	about the supporte		<u> </u>								
	(i	) Name of supported	(ii) EIN	(iii) Type of organization (described on lines 1-9	P '	rganization in your		(vi) Amount of					
		organization		above or IRC section	governing	document?	support (see Instructions)	other support (see Instructions)					
				(see instructions))	Yes	No	instructions)	instructions)					
							711						
			<u> </u>		†								

### Schedule A (Form 990 or 990 EZ) 2014 VALUES IN ACTION INSTITUTE 31-16632 | 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.)

ction A. Public Support						<b>_</b>
ndar year (or fiscal year beginning in) 🕨	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
Gifts, grants, contributions, and						
membership fees received. (Do not						
include any "unusual grants.")	490,000.	210,085.	<u> 152,662.</u>	101,000.	28,063.	981,810.
Tax revenues levied for the organ-						
ization's benefit and either paid to						
or expended on its behalf						
The value of services or facilities	ļ					
furnished by a governmental unit to						
the organization without charge						
	490,000.	210,085.	152,662.	101,000.	28,063.	981,810.
The portion of total contributions						
-						
	-					
		-				
· ·						
column (f)				· · · · · · · · · · · · · · · · · · ·		431,624.
	<u> </u>					550,186.
				<del>-</del>	<u> </u>	
, ,		(b) 2011				(f) Total
	490,000.	210,085.	152,662.	101,000.	28,063.	981,810.
*						
· • •	42.046	40 40=	24 254	45 060	00 441	100 046
and income from similar sources	13,046.	12,435.	31,261.	17,063.	28,441.	102,246.
•			•			
· ·			i			
· ·						200
` '	329.					329.
	<u> </u>	l			1 2	1084385.
•	•	•		- 1		,211,520.
<u>-</u>	-	first, second, thire	d, fourth, or fifth ta	x year as a section	n 501(c)(3)	
organization, check this box and stop	) here ic Support Per	rentage			· ·	
			(6)		44	50.74 %
., , , , , , , , , , , , , , , , , , ,	• • • • • • • • • • • • • • • • • • • •	-				60.02 %
	·				· · · · · · · · · · · · · · · · · · ·	
					iore, crieck triis bo	× and   × X
•		-			or more, check th	
• •	-			III le 13 13 33 1/3/0	of more, check th	<b>▶</b> □
•				. 13 16a or 16b s	and line 14 is 10%	or more
	_					
•			•	•	t triber the organ	<b>&gt;</b>
	_		•		 17a and line 15 is 1	
•				•		▶□
_		_				· · · · <b>\</b>
THE TOURS OF THE TOURS OF THE TENTON OF THE TENTO	Die Het Griook a L	22. 00 10, 100	-,,			
	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")  Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. The value of services or facilities furnished by a governmental unit to the organization without charge. Total. Add lines 1 through 3. 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).  Public support. Subtract line 5 from line 4. Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. Net income from unrelated business activities, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI).  Total support. Add lines 7 through 10. Gross receipts from related activities, First five years. If the Form 990 is for organization, check this box and stoction C. Computation of Public support percentage from 2013 in 33 1/3% support test - 2014. If the computation of the public support percentage from 2013 in 33 1/3% support test - 2014. If the computation of the computation of Public support percentage from 2013 in 33 1/3% support test - 2014. If the computation of the computation of the computation qualifies and stop here. The organization qualifies and stop here. The organization meets the "facts-and-circumstances test more, and if the organization meets the "facts-and-circumstances test more, and if the organization meets the organization meets the organization meets the "facts-and-circumstances test more, and if the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization meets the organization	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")  Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. The value of services or facilities furnished by a governmental unit to the organization without charge. Total. Add lines 1 through 3  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)  Public support. Subtract line 5 from line 4  Cross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources  Net income from unrelated business activities, whether or not the business is regularly carned on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)  Total support. Add lines 7 through 10  Gross receipts from related activities, etc. (see instruction organization, check this box and stop here. The organization of Public Support Perticon C. Computation of Public Support Perticon C. Computation of Public Support Perticon C. The organization qualifies as a publicly support facts- and-circumstances test - 2014. If the organization did no and stop here. The organization qualifies as a publicly support of facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization did no and stop here. The organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances test - 2014. If the organization meets the "facts- and-circumstances" test.	indar year (or fiscal year beginning in) Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")  Tar revenues levied for the organization's benefit and either paid to or expended on its behalf.  The value of services or facilities furnished by a governmental unit to the organization without charge.  Total. Add lines 1 through 3  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)  Public support. Subtract line 5 from line 4.  Gross income from interest, dividends, payments received on securities, whether or not the business is regularly carned on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)  Total support. Add lines 7 through 10  Gross receipts from related activities, etc. (see instructions)  First five years. If the Form 990 is for the organization's first, second, third organization, check this box and stop here.  The organization of Public Support Percentage  Public support percentage from 2013 Schedule A, Part II, line 14.  33 1/3% support test - 2014. If the organization did not check the box or stop here. The organization qualifies as a publicly supported organization and if the organization meets the "facts-and-circumstances" test, check the meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization meets the "facts-and-circumstances" test, corganization did not corganization me	Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants.')  Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. The value of services or facilities furnished by a governmental unit to the organization without charge.   Total. Add lines 1 through 3  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)  Public support. Subtract line 5 from line 4  Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. Net income from unrelated business activities, whether or not the business is regularly carned on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)  Total support. Add lines? Through 10  Total support asset is the Form 990 is for the organization, check this box and stop here. The organization did not check the box on line 13, and line is stop here. The organization qualifies as a publicly supported organization (10% - facts-and-circumstances test - 2014. If the organization did not check a box on line and if the organization meets the "facts-and-circumstances test - 2014. If the organization did not check a box on line and organization meets the "facts-and-circumstances test - 2014. If the organization did not check a box on line and organization meets the "facts-and-circumstances test - 2014. If the organization did not check a box on line and organization meets the "facts-and-circumstances test - 2014. If the organization did not check a box on line and organization meets the "facts-and-circumstances test. The organization dudifies as a publicly supported organization more, and if the organization meets the "facts-and-circumstances test. The organization qualifies as a public organization dudifies as a public organization dudifies as a public organization dudifies as a publ	and a year (or fiscal year beginning in)   Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")  Tax revenues levied for the organization of the organization is benefit and either paid to or expended on its behalf. The value of services or facilities furnished by a governmental unit to the organization without charge. Total, Add lines 1 through 3. Total, Add lines 1 through 3. Total, Add lines 1 through 3. Total, Add lines 1 through 3. Total, Add lines 1 through 3. Total, Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 3. Total Add lines 1 through 4. Total support, Sustant lines 5 tion line 4. Total Support 6 organization 1 through 4. Total support 1 that exceeds 2% of the amount shown on line 11, column (f)  Public support, Sustant lines 5 tion line 4. Total support 1 through 10. Total support 1 through 10. Total support 2 through 10. Total support 2 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support, Add lines 7 through 10. Total support and 10. Total support and 10. Total support and 10. Total support 10	indiar year (or fiscal year beginning in)    Giffs, grants, contributions, and membership fees received. (Do not include any 'unusual grants.')  Arx revenues leveled for the organization's benefit and either paid to or expended on its behalf. The value of services or facilities furnished by a governmental unit to the organization without charge. Total, Add lines 1 through 3. 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, coloiumn (f)  Public support. Subreat line 8 from line 4. 490,000. 210,085. 152,662. 101,000. 28,063. 490,000. 210,085.

### 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.)

Se	ction A. Public Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2010	<b>(b)</b> 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1	Gifts, grants, contributions, and						
	membership fees received. (Do not			Ì			
	include any "unusual grants.")						ļ
2	Gross receipts from admissions,						
	merchandise sold or services per-						
	formed, or facilities furnished in any activity that is related to the		İ				
	organization's tax-exempt purpose						
3	Gross receipts from activities that						
	are not an unrelated trade or bus-						
	iness under section 513						
4	Tax revenues levied for the organ-						
	ızatıon's benefit and either paid to						
	or expended on its behalf						
5	The value of services or facilities						
	furnished by a governmental unit to	[		İ			
	the organization without charge						
6	Total. Add lines 1 through 5						
7 a	Amounts included on lines 1, 2, and	 				İ	
	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				ļ		
	Public support (Subtract line 7c from line 6)	J		<u> </u>	<u> </u>	<u> </u>	
<u>Sec</u>	ction B. Total Support				,		
Cale	ndar year (or fiscal year beginning in) 🕨	(a) 2010	<b>(b)</b> 2011	(c) 2012	(d) 2013	(e) 2014	(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						
-	Add lines 10a and 10b						
11	Net income from unrelated business activities not included in line 10b.						
	whether or not the business is						
	regularly carned on						
12	Other income. Do not include gain or loss from the sale of capital						
	assets (Explain in Part VI)		· · · · · · · · · · · · · · · · · · ·				<del> </del>
	Total support. (Add lines 9, 10c, 11, and 12)			<u> </u>	L		
14	First five years. If the Form 990 is for	the organization's	s first, second, thir	d, fourth, or fifth t	ax year as a section	n 501(c)(3) organiz	ation,
<u> </u>	check this box and stop here	. Command Da		<del> </del>		_ <del>'</del>	<u></u>
	ction C. Computation of Publ					T .= T	
	Public support percentage for 2014 (I		•	column (t))		15	%
	Public support percentage from 2013 etion D. Computation of Inves			<del> </del>		16	%
	•			20 13 polymo (6)		47	
17	• •	*				17	<u>%</u> %
	Investment income percentage from 2					18   31/3% and line 1	
198	33 1/3% support tests - 2014. If the						/ IS HOL
	more than 33 1/3%, check this box at			· · · · · · · · · · · · · · · · · · ·			<b>~</b>
0	33 1/3% support tests - 2013. If the	-					
20	line 18 is not more than 33 1/3%, che Private foundation. If the organization		-			_	
<u> 2</u> U	rinvate roundation, ii the organizatio	n did not crieck a	DUX UIT III IE 14, 19	a, or 130, check th	ing DON ALIU SEE ITS	300000118 .	

### SCHEDULE D

Department of the Treasury

Internal Revenue Service

(Form 990)

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.

► Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047 Inspection

Name of the organization

VALUES IN ACTION INSTITUTE

Employer identification number

31-1663243 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 Aggregate value of contributions to (during year) Aggregate value of grants from (during year) 3 Aggregate value at end of year .. . .. .... . . . 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? 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? Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7. 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 a historically important land area Protection of natural habitat Preservation of a certified historic structure Preservation of open space 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 Tax 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) d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register . . ... . .. .. . . . . Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax 3 Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of Yes No violations, and enforcement of the conservation easements it holds? Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year > \$ 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)? 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) Revenue 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 Revenue included in Form 990, Part VIII, line 1 b Assets included in Form 990, Part X

		IN ACTION							63243		ıge <b>2</b>
Pa	rt III Organizations Maintaining (	Collections of A	rt, His	storical Tr	reasures,	or Oth	<u>er Simil</u>	lar Asse	ts(contin	ued)	
3	Using the organization's acquisition, access	ion, and other record	ds, ched	ck any of the	following th	at are a s	significant	use of its	collection	items	3
	(check all that apply):										
а	Public exhibition	(	d 🔲	Loan or exc	change prog	rams					
b	Scholarly research	,			J- 1J						
c	Preservation for future generations	`	•	Othor					_		
	Provide a description of the organization's c	collections and evalu	in how t	hav furthar t	bo organizat	tion's ave	mat aum	ooo in Da	4 VIII		
4								oşe ili Pai	t Aill.		
5	During the year, did the organization solicit of					ner simila	r assets		٦.,	١	
Da	to be sold to raise funds rather than to be m					<del></del>			_ Yes		No
Pal	t IV Escrow and Custodial Arran		ete if th	e organizatio	on answered	"Yes" to	Form 990	), Part IV,	line 9, or		
	reported an amount on Form 990, Pa										
1a	Is the organization an agent, trustee, custod	lian or other intermed	diary for	contribution	ns or other a	ssets not	ncluded	_	_	_	
					•			└_	_ Yes		No
b	If "Yes," explain the arrangement in Part XIII	and complete the fo	ollowing	table:							
									Amount		
С	Beginning balance						1c				
d	Additions during the year						1d				
е	Distributions during the year					_	1e	ĺ			
f	Ending balance						1f				
2a	Did the organization include an amount on F		21, for	escrow or co	ustodial acc	ount liabi	Irty?		Yes		No
	If "Yes," explain the arrangement in Part XIII.	•					•	• •			
Pai							10.				
		(a) Current year	ĺ	Prior year	(c) Two year	T T		vears hack	(e) Four y	ears h	ack
1a	Beginning of year balance	(a) carront year	(0).	1101 1041	107 : 110 ) 01	aro odon	(4) 111100	rouro ouoit	(6)100.	our o	uon
1a L	Contributions								<u></u> -		
D							<del></del>				
С.	Net investment earnings, gains, and losses										
	Grants or scholarships						·-···		ļ		
е	Other expenditures for facilities										
	and programs										
f	Administrative expenses										
g	End of year balance								L		
2	Provide the estimated percentage of the cur	-	e (line 1	g, column (a	a)) held as:						
а	Board designated or quasi-endowment		_%								
b	Permanent endowment >	%									
С	Temporanly restricted endowment ▶	%									
	The percentages in lines 2a, 2b, and 2c should	uld equal 100%.									
За	Are there endowment funds not in the posse	ession of the organiza	ation tha	at are held a	nd administe	ered for t	he organiz	zation			
	by:								\ \frac{1}{2}	es	No
	(i) unrelated organizations								3a(i)		
	(ii) related organizations						• •• •• •		3a(ii)		
b	If "Yes" to 3a(ii), are the related organizations					•••••			3b		
4	Describe in Part XIII the intended uses of the					••••					
Par				101100			-				
	Complete if the organization answere		Part IV	/ line 11a S	ee Form 990	) Part Y	line 10				
				1		ı			(a) Daa!:	unters	
	Description of property	(a) Cost or o		1	or other (other)		ccumulate	1	(d) Book	value	
		Dasis (IIIVesti	HELIL)	Dasis	(Oti lel)	ue	preciation	-+			
	Land										
	Buildings										
С	Leasehold improvements										
d	Equipment				789.		4'	74.		<u>31</u>	<u>.5.</u>
e	Other					L					
Total	. Add lines 1a through 1e (Column (d) must e	qual Form 990, Part	X, colur	nn (B), line 1	0c.)					31	5.

(b) Book value	(C) MELIOU OF (	adation. Cost of E	end-of-year market value
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			nd-of-year market value
(b) Book value	(c) Wethod of V	aluation Cost of e	nd-or-year market value
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to Form 000 Doublik im	- 114 C F 000 I	Dark V. brand F	
	e 11a See Form 990, i	Part X, line 15	(b) Book value
Description			(b) DOOK Value
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<del>? 15.)</del>			<u> </u>
to Form OOO Dort IV in	a 11a az 116 Cza Farra	000 D-4 V ( 0	c
to Form 990, Part IV, IIII		990, Part X, line 2	J.
	(b) Book value		
D DADEN	400		
D PARTY	482.		
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25) ▶	482.		
	to Form 990, Part IV, lin Description  e 15.)  to Form 990, Part IV, lin Description	to Form 990, Part IV, line 11d See Form 990, I Description  15.)  to Form 990, Part IV, line 11e or 11f. See Form (b) Book value  D PARTY  482.	to Form 990, Part IV, line 11d See Form 990, Part X, line 15 Description  to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 28  (b) Book value  D PARTY  482.

VALUES IN ACTION INSTITUTE

31-1663243 Page 4

### SCHEDULE J (Form 990)

### **Compensation Information**

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

Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

► Attach to Form 990.

► Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

2014

Open to Public Inspection

Name of the organization

Department of the Treasury

me of the organization

VALUES IN ACTION INSTITUTE

Employer identification number 31-1663243

Part I **Questions Regarding Compensation** Yes No ta Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. First-class or charter travel Housing allowance or residence for personal use Travel for companions Payments for business use of personal residence Tax indemnification and gross-up payments Health or social club dues or initiation fees Personal services (e.g., maid, chauffeur, chef) Discretionary spending account b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain 1b Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including 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. Written employment contract Compensation committee Independent compensation consultant Compensation survey or study Form 990 of other organizations Approval by the board or compensation committee 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? b Participate in, or receive payment from, a supplemental nonqualified retirement plan? 4b c Participate in, or receive payment from, an equity-based compensation arrangement? 4c If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III. Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9. 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: X a The organization? **b** Any related organization? If "Yes" to line 5a or 5b, describe in Part III. 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 X a The organization? 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 X 7 . . . . . . . . . . Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the X initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III 9 If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

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

Schedule J (Form 990) 2014

VALUES IN ACTION INSTITUTE Schedule J (Form 990) 2014

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 (ii) 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.

	-	(B) Breakdown of	(B) Breakdown of W-2 and/or 1099-MISC compensation	SC compensation	(C) Retirement and	(D) Nontaxable	(E) Total of columns	(F) Compensation
(A) Name and Title	1	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	other deferred compensation			ın column (B) reported as deferred ın prior Form 990
(1) NEAL H. MAYERSON PH.D.	=	0	0.	0.	0	0	0	0
	<u>.</u>	175,264.					175,26	0
SR	€	0.						0
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Schedule J (Form 990) 2014

### SCHEDULE O (Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ Complete to provide information for responses to specific questions on

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Form 990 or 990-EZ or to provide any additional information.

Attach to Form 990 or 990-EZ.

Open to Public

Inspection

OMB No 1545-0047

Department of the Treasury Internal Revenue Service

Name of the organization

VALUES IN ACTION INSTITUTE

Employer identification number 31-1663<u>243</u>

FORM 990, PART III, LINE 2, NEW PROGRAM SERVICES:
VIA PRO - THE ACTIVATION OF STRENGTHS: ADVANCED ISSUES IS AN
INTERACTIVE COURSE THAT FOCUSES ON HELPING PRACTITIONERS FOCUS ON
CHARACTER STRENGTHS THROUGH THE LENS OF THE VIA-PRO REPORT. IT
ADDRESSES THE USE OF CHARACTER STRENGTHS TO PROMOTE RELATIONSHIPS,
MANAGE PROBLEMS AND CONFLICTS, AND MAINTAIN MEANINGFUL GOALS.
FORM 990, PART VI, SECTION A, LINE 2:
NEAL MAYERSON, PRESIDENT, IS MARRIED TO DONNA MAYERSON,
SECRETARY/TREASURER.
FORM 990, PART VI, SECTION B, LINE 11:
A DRAFT COPY OF THE 990 IS MADE AVAILABLE TO EACH BOARD MEMBER. THEY ARE
ASKED TO PROMPTLY REVIEW THE 990 AND DISCUSS ANY QUESTIONS THEY MAY HAVE
WITH THE PRESIDENT. IF THERE ARE ANY ITEMS OR AREAS FOR DISCUSSION, THEY
WILL BE RESOLVED BEFORE THE 990 IS FILED.
FORM 990, PART VI, SECTION C, LINE 19:
YES, COPIES OF DOCUMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.
FORM 990, PART VII CONTACT ADDRESSES FOR OFFICERS, DIRECTORS, ETC:
NEAL H. MAYERSON, PH.D 312 WALNUT STREET SUITE 3600
CINCINNATI, OH 45202
DONNA MAYERSON, PH.D 312 WALNUT STREET SUITE 3600, CINCINNATI, OH 45202

	<del></del>
Schedule O (Form 990 or 990-EZ) (2014)	
Name of the organization	Page Employer identification number
VALUES IN ACTION INSTITUTE	31-1663243
NEAL H. MAYERSON, PRESIDENT, AVERAGED THE FOLLOWING HOURS	DEVOTED TO
THESE RELATED ORGANIZATIONS: 10 HOURS PER WEEK TO THE MAN	UEL D. & RHODA
MAYERSON FOUNDATION, 20 HOURS PER WEEK TO THE MAYERSON CO	MPANY, AND 1
HOURS PER WEEK TO THE MAYERSON FOUNDATION.	
BRETA C. COOPER, TRUSTEE, AVERAGED THE FOLLOWING HOURS DE	VOTED TO THESE
RELATED ORGANIZATIONS: 10 HOURS PER WEEK TO THE MANUEL D.	& RHODA
MAYERSON FOUNDATION, AND 9 HOURS PER WEEK TO THE MAYERSON	FOUNDATION.
FORM 990, PART VI, SECTION A, LINE 9:	
SEAN SLOVENSKI	
5405 MIAMI ROAD	
CINCINNATI, OH 45243	
JAY SHARP	
557 11TH AVE., E	
SALT LAKE CITY, UT 84103	
TED MARTIN	
312 WALNUT STREET, SUITE 2650	
CINCINNATI, OH 45202	

SCHEDULE R

(Form 990)

Name of the organization Department of the Treasury Internal Revenue Service

Part I

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37. Related Organizations and Unrelated Partnerships

▶ Attach to Form 990.

Open to Public Inspection 2014

OMB No 1545-0047

►Information about Schedule R (Form 990) and its instructions is at www.lrs.gov/form990.

VALUES IN ACTION INSTITUTE

Identification of Disregarded Entities Complete if the organization answered "Yes" on Form 990, Part IV, line 33

Employer identification number 31-1663243

(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 organizations during the tax year.	itions Complete if the organization ar	if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt	Part IV, line 34 bec	ause it had one or	more related tax-exen	npt	
(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	(f) Direct controlling entity	(g) Section 512(bX13) controlled entity?	bX13)
				501(c)(3))		Yes	No
THE MANUEL D, & RHODA MAYERSON FOUNDATION - 31-1310431, 312 WALNUT STREET, SUITE 3600, CINCINNATI, OH 45202	CHARITABLE/EDUCATIONAL	отно	E)	PRIVATE FOUNDATION			×
THE MAYERSON FOUNDATION - 20-3991562 312 WALNUT STREET, SUITE 3600 CINCINNATI, OH 45202	CHARITABLE/EDUCATIONAL	оню	E) (2) (3) E	PRIVATE FOUNDATION			×

Schedule R (Form 990) 2014

31-1663243

Page 2

Schedule R (Form 990) 2014 VALUES IN ACTION INSTITUTE

Part III

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

(4)	4	3	1			9	1				
Name, address, and EIN of related organization	Primary activity	Legal domicile	(u) Direct controlling entity		t income related,	(1) Share of total income	(g) Share of end-of-year	(n) Disproportionate allocations?	Code V-UBI		(J) (K) General or Percentage managing ownership
		foreign country)		sections	512-514)		assets	Yes		SS) Yes No	•
312 WALNUT LIMITED PARTNERSHIP - 31-1257268, 312 WALNUT STREET, SULTE 3600, RI	RENTAL REAL								1		
CINCINNATI, OH 45202 ES	ESTATE	ОН	N/A	N/	N/A	N/A	N/A	N/A	N/A	N/A	N/A
				<u>.</u>							
	i					-				•	
			ļ								
					· · · · · ·						
Part IV Identification of Related Organizations Taxable as a Corporation or Trust Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.	nizations Taxable oration or trust dur	as a Corpoing the tax )	oration or Trust Co /ear.	omplete if the	e organization a	nswered "Yes"	on Form 990,	Part IV, line 3	4 because it had	d one or mo	re related
(a)			(p)	(၁)	(p)	(e)		€	(a)	Œ	8
Name, address, and EIN of related organization		Prim	Primary activity	Legal domicite (state or foreign country)	Direct controlling entity	Type of entity (C corp, S corp, or trust)		Share of total income	of Year Is	Percentage ownership	Section Sectio
THE MAYERSON COMPANY - 31-1125828		REAL ESTATE	TE								LES NO
312 WALNUT STREET, SULTE 3600		MANAGEMENT AND	T AND								
CINCINNATI, OH 45202		DEVELOPMENT	NT	ОН	N/A	SCORP	<b>4</b>	N/A	N/A	A/N	×
CHARACTER STRENGTHS CORP, - 35-2	35-2438658			Α	ALUES IN						
312 WALNUT STREET, SUITE 3600		LICENSING OF	OF	-«C	ACTION						
CINCINNATI, OH 45202		INTELLECTUAL	UAL PROPERTY	OH	INSTITUTE	CCORP		<10.431,>	133,865,	1008	×
				-		<del></del>	-		,		
								-			
			•								

Schedule R (Form 990) 2014

31-1663243 Page 3,

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

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.				Yes No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?	s with one or more r	elated organizations listed	in Parts II-IV?	
	_	٠		Ta X
<ul> <li>b Giff, grant, or capital contribution to related organization(s)</li> </ul>	:			tb X
<ul> <li>Giff, grant, or capital contribution from related organization(s)</li> </ul>	•	•		1c X
d Loans or loan guarantees to or for related organization(s)				1d X
<ul> <li>Loans or loan guarantees by related organization(s)</li> </ul>				×
f Dividends from related organization(s)		:	:	×
g Sale of assets to related organization(s)			•	X X
h Purchase of assets from related organization(s)				
i Exchange of assets with related organization(s)				
j Lease of facilities, equipment, or other assets to related organization(s)				×
k Lease of facilities, equipment, or other assets from related organization(s)				<b>&gt;</b>
Performance of services or membership or fundraising solicitations for re	lated organization(s)			\$ \$
m Performance of services or membership or fundraising solicitations by related organization(s)	nization(s)			
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	on(s)		1	×
o Sharing of paid employees with related organization(s)				+-
				<del> </del>
p Reimbursement paid to related organization(s) for expenses			:	<del>1</del> 0
q Reimbursement paid by related organization(s) for expenses				×
(A) and transfer of conditions of changes to done to advantage to the conditions of				
r Other transfer of cash or property to related organization(s)				
1	t etalumon tarim oth	bozowoo paibuloan earl sid	- Lindsont and transfer and and and and and and and and and and	1S A
	יווס ווומפו כסוווסופופ ו	illo illie, il icidolli ig covered	relationships and transaction thresholds.	
(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved	pev.
(1) THE MANUEL D. & RHODA MAYERSON FOUNDATION	ບ	25,000.		
(2) THE MAYERSON COMPANY	0	178.546.	178.546.WAGES/TAXES/BENEFITE	
(3)				
(4)				
(5)				
16)				
432163 08-14-14			a disperior	Schedule R (Form 990) 2014

**Depreciation and Amortization** (Including Information on Listed Property)

OMB No. 1545-0172

Department of the Treasury Internal Revenue Service (99) Name(s) shown on return

► Attach to your tax return. ▶ Information about Form 4562 and its separate instructions is at www.lrs.gov/form4562.

Business or activity to which this form relates

990

Attachment Sequence No 179

identifying number

<u>VAI</u>	UES IN ACTION INST	ITUTE		FOR	<b>M</b> 9	90 P	AGE 10		31-1663243
Par	t I Election To Expense Certain Prope	rty Under Section 1	79 Note: If yo	ou have any lis	ted p	roperty, c	complete Part	V before y	ou complete Part I.
1 M	laximum amount (see instructions)							1	500,000.
2 T	otal cost of section 179 property plac	ed in service (see	instructions	) .				2	
3 T	hreshold cost of section 179 property	before reduction	in limitation					3	2,000,000.
4 R	eduction in limitation. Subtract line 3	from line 2. If zero	or less, ente	er -0				. 4	
<b>5</b> D	ollar limitation for tax year Subtract line 4 from line	1 If zero or less, enter	-0- If married file	ing separately, see	nstruc	tions		5	
6	(a) Description of pr	operty		(b) Cost (busin	ess use	only)	(c) Electe	d cost	
									Į
7 L	sted property. Enter the amount from	line 29				7			
8 T	otal elected cost of section 179 prope	erty. Add amounts	s in column (d	c), lines 6 and	7			8	
9 T	entative deduction Enter the smaller	of line 5 or line 8						9	
10 C	arryover of disallowed deduction from	i line 13 of your 20	013 Form 45	62			-	. 10	
	usiness income limitation. Enter the s		-			ine 5		. 11	-
	ection 179 expense deduction. Add li				ne 11	<del></del>		12	-
	arryover of disallowed deduction to 2		· · · · · · · · · · · · · · · · · · ·		. ▶	13			l
	Do not use Part II or Part III below for	<u> </u>				<del></del>			
Par									T
	pecial depreciation allowance for qua	lified property (oth	ner than liste	d property) pla	aced ı	n service	during	1	205
	e tax year			-	•	•		14	395.
	roperty subject to section 168(f)(1) ele	ection .					•	15	
16 O	ther depreciation (including ACRS)				<del></del>	····		16	
Fai	t III MACRS Depreciation (Do no	t include listed pr		ction A	)				·
47. 14	AODO de de de de la constanta della constanta de la constanta de la constanta de la constanta						-	47	
	ACRS deductions for assets placed in	•	•	•			▶ [**	<u>. 17</u>	<u> </u>
10 11	ou are electing to group any assets placed in service of the section B - Assets						eral Deprecia	ation Syst	em
	Occion D 753013	(b) Month and	(c) Basis for	depreciation			- Depresi		
	(a) Classification of property	year placed in service		ivestment use instructions)		Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a	3-year property	<del>                                     </del>					<u> </u>		
b	5-year property	1		394.	5	YRS.	HY	200DB	79.
c	7-year property	1 1			<u> </u>				
ď	10-year property	1 1							<u></u>
e	15-year property	1 1		-					
f	20-year property	1							
q	25-year property	1			2	5 yrs.		S/L	
		/				.5 yrs.	ММ	S/L	
h	Residential rental property	/		-		.5 yrs.	ММ	S/L	-
		/				9 vrs.	ММ	S/L	
i	Nonresidential real property	/					ММ	S/L	
	Section C - Assets P	laced in Service	During 2014	Tax Year Us	sing th	ne Altern	ative Deprec	iation Sys	stem
20a	Class life							S/L	
ь	12-year	1			1	2 yrs.		S/L	
С	40-year	/				0 yrs.	ММ	S/L	
Par	t IV Summary (See instructions.)			_					
21 L	sted property. Enter amount from line	28						21	
	otal. Add amounts from line 12, lines		es 19 and 20	) ın column (g)	, and	lıne 21.		-	
E	nter here and on the appropriate lines	of your return. Pa	artnerships a	nd S corporat	ions -	see instr	· <u> </u>	. 22	474.
<b>23</b> Fo	or assets shown above and placed in	service during the	current yea	r, enter the					
po	ortion of the basis attributable to sect	on 263A costs .				23			

VALUES IN ACTION INSTITUTE 31-1663243 Page 2 Form 4562 (2014) Listed Property (Include automobiles, certain other vehicles, certain aircraft, certain computers, and property used for entertainment, Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, completeonly 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable. Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to s	upport the bu	siness/investment	use claimed?	Yes No	24b If "Y	es," is the	evider	nce written?	Yes Ne
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Metho Conven		(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allo	wance for q	ualified listed pro	pperty placed in s	ervice during the ta	ax year an	d			
used more than 50% in	a qualified b	usiness use					25	•	
26 Property used more that	n 50% ın a q	ualified business	use						
		%							
		%							
		%							
7 Property used 50% or le	ss in a quali	fied business us	e:						
		%				S/L·			-
		%				S/L·			
		%				S/L ·			
28 Add amounts in column	(h), lines 25	through 27 Ente	er here and on line	21, page 1			28		
9 Add amounts in column	(i), line 26. E	nter here and on	line 7, page 1				-	. 29	•

#### Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

30	Total business/investment miles driven during the year (do not include commuting miles)	(a Veh	a) iicle	(t Veh	o) ncie	I -	c) ncle	Veh	•	(e Veh	•	(1 Veh	ncle
31	Total commuting miles driven during the year												
32	Total other personal (noncommuting) miles												
	driven											<u> </u>	
33	Total miles driven during the year.					•							
	Add lines 30 through 32												
34	Was the vehicle available for personal use	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
	during off-duty hours?												
35	Was the vehicle used primarily by a more					:							
	than 5% owner or related person?												
36	is another vehicle available for personal												
	use?												

### Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37	7 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your				
	employees?				
	Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your				
	employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners				
39	Do you treat all use of vehicles by employees as personal use?				
40	Do you provide more than five vehicles to your employees, obtain information from your employees about				
	the use of the vehicles, and retain the information received?		<u></u>		
41	Do you meet the requirements concerning qualified automobile demonstration use?		<u> </u>		
	Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.				
P	art VI Amortization				

P	art VI   Amortization						
	(a) Description of costs	(b) Date amortization begins	(C) Amortizable amount	(d) Code section	(e) Amortizat period or peri		(f) Amortization for this year
<u>42</u>	Amortization of costs that begins during you	ır 2014 tax year:				_	
43 Amortization of costs that began before your 2014 tax year						43	•
44	Total, Add amounts in column (f). See the in	44					