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Return of Private Foundation  
or Section 4947(a)(1) Trust Treated as Private Foundation

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning

, 2014, and ending , 20

Name of foundation

ALLIANZ FOUNDATION FOR NORTH AMERICA

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

777 SAN MARIN DRIVE

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

NOVATO CA 94998

G Check all that apply:  Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name change

H Check type of organization:  Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ► \$ 66,140.00 (Part I, column (d) must be on cash basis)

J Accounting method:  Cash  Accrual  
 Other (specify) \_\_\_\_\_

A Employer identification number

68-0493856

B Telephone number (see instructions)

415-899-2000

C If exemption application is pending, check here ► D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the 85% test, check here and attach computation ► E If private foundation status was terminated under section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► 

**Part I Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
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1 Contributions, gifts, grants, etc., received (attach schedule)	427,480			
2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	0			
4 Dividends and interest from securities				
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10				
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)		0.00		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less. Cost of goods sold				
c Gross profit or (loss) (attach schedule)	0.00			
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	427,480.00	0.00	0.00	

13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule) AUG 19 2015				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)				
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)				
24 Total operating and administrative expenses.				
Add lines 13 through 23	0.00	0.00	0.00	0.00
25 Contributions, gifts, grants paid	427,500			427,500
26 Total expenses and disbursements. Add lines 24 and 25	427,500.00	0.00	0.00	427,500.00
27 Subtract line 26 from line 12.				
a Excess of revenue over expenses and disbursements	(20.00)			
b Net investment income (if negative, enter -0-)		0.00		
c Adjusted net income (if negative, enter -0-)			0.00	

<b>Part II</b> <b>Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	<b>Beginning of year</b>	<b>End of year</b>	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1	Cash—non-interest-bearing	66,160	66,140	66,140
	2	Savings and temporary cash investments			
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts ►			
	4	Pledges receivable ►			
		Less: allowance for doubtful accounts ►			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ►			
		Less: allowance for doubtful accounts ►			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ►			
	Less accumulated depreciation (attach schedule) ►				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)				
14	Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
15	Other assets (describe ► )				
16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	66,160.00	66,140.00	66,140.00	
<b>Liabilities</b>	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ► )			
	23	<b>Total liabilities</b> (add lines 17 through 22)	0.00	0.00	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ► <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	66,160	66,140	
	30	<b>Total net assets or fund balances</b> (see instructions)	66,160.00	66,140.00	
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions)	66,160.00	66,140.00	

**Part III Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	66,160.00
2	Enter amount from Part I, line 27a	2	(20.00)
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	66,140.00
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	66,140.00

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8			3		

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part Yes  No

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	637,500	142,283	4.4805
2012	250,000	81,551	3.0656
2011	405,500	53,697	7.5516
2010	462,500	54,527	8.4820
2009	474,500	41,196	11.5181

2 Total of line 1, column (d)	2	35.0978
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	7.05
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	128,778
5 Multiply line 4 by line 3	5	907,884.90
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	907,884.90
8 Enter qualifying distributions from Part XII, line 4	8	427,500

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)	1
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input type="checkbox"/> and enter 1% of Part I, line 27b	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2
3	Add lines 1 and 2	3 0.00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5 0.00
6	<b>Credits/Payments:</b>	
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a
b	Exempt foreign organizations—tax withheld at source	6b
c	Tax paid with application for extension of time to file (Form 8868)	6c
d	Backup withholding erroneously withheld	6d
7	Total credits and payments Add lines 6a through 6d	7 0.00
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9 0.00
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10 0.00
11	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> ►	Refunded 11 0.00

**Part VII-A Statements Regarding Activities**

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes X
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	X
1c	Did the foundation file Form 1120-POL for this year?	X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ► \$ _____ (2) On foundation managers ► \$ _____	
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	N/A
b	If "Yes," has it filed a tax return on Form 990-T for this year?	X
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► California	
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	X

**Part VII-A Statements Regarding Activities (continued)**

11.	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12.	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13.	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <a href="http://WWW.ALLIANZ.COM/FOUNDATION-NA">WWW.ALLIANZ.COM/FOUNDATION-NA</a>	13	X	
14.	The books are in care of ► ALLIANZ FOUNDATION FOR NORTH AMERICA Telephone no ► (301) 408-8195 Located at ► 777 SAN MARIN DRIVE, NOVATO, CA ZIP+4 ► 94998-1320			
15.	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16.	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1) If "Yes," enter the name of the foreign country ►	16	Yes	No X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ►		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If "Yes," list the years ► 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions)	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.)	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?		

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

5a	During the year did the foundation pay or incur any amount to:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	N/A		
	Organizations relying on a current notice regarding disaster assistance check here	► <input type="checkbox"/>		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	<i>If "Yes" to 6b, file Form 8870</i>			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		
		7b		

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE ATTACHED SCHEDULE				

**2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000				► NONE

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**
**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total number of others receiving over \$50,000 for professional services</b>		►

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc		Expenses
1		
2		
3		
4		

**Part IX-B Summary of Program-Related Investments (see instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
1		
2		
All other program-related investments. See instructions		
3		
<b>Total. Add lines 1 through 3</b>		► 0.00

**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	
b	Average of monthly cash balances	1b	130,739
c	Fair market value of all other assets (see instructions)	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	130,739.00
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	130,739.00
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	1,961
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	128,778.00
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	6,438.90

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ►  and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	6,439
2a	Tax on investment income for 2014 from Part VI, line 5	2a	0
b	Income tax for 2014 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0.00
3	Distributable amount before adjustments Subtract line 2c from line 1	3	6,439.00
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	6,439.00
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	6,439.00

**Part XII Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	427,500
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0
3	Amounts set aside for specific charitable projects that satisfy the	3a	0
a	Suitability test (prior IRS approval required)	3b	0
b	Cash distribution test (attach the required schedule)	4	427,500.00
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	5	
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	6	427,500.00
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4		

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income (see instructions)**

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				6,439.00
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only				
b Total for prior years 20 20 20				
3 Excess distributions carryover, if any, to 2014				
a From 2009 0				
b From 2010 0				
c From 2011 0				
d From 2012 0				
e From 2013 0				
f Total of lines 3a through e 0.00				
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 427,500				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2014 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 0.00				
b Prior years' undistributed income. Subtract line 4b from line 2b 0.00				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed 0.00				
d Subtract line 6c from line 6b Taxable amount—see instructions 0.00				
e Undistributed income for 2013 Subtract line 4a from line 2a. Taxable amount—see instructions 0.00				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 0.00				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions) 427,500				6,439.00
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a 0.00				
10 Analysis of line 9				
a Excess from 2010 0				
b Excess from 2011 0				
c Excess from 2012 0				
d Excess from 2013 0				
e Excess from 2014 0				

**Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)**

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling ►				
b	Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)				
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed				
b	85% of line 2a				0.00
c	Qualifying distributions from Part XII, line 4 for each year listed				0.00
d	Amounts included in line 2c not used directly for active conduct of exempt activities				0.00
e	Qualifying distributions made directly for active conduct of exempt activities				0.00
	Subtract line 2d from line 2c				0.00
3	Complete 3a, b, or c for the alternative test relied upon				
a	"Assets" alternative test—enter:				
(1)	Value of all assets				0.00
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)				0.00
b	"Endowment" alternative test—enter $\frac{2}{3}$ of minimum investment return shown in Part X, line 6 for each year listed				0.00
c	"Support" alternative test—enter:				
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities, loans (section 512(a)(5)), or royalties)				0.00
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				0.00
(3)	Largest amount of support from an exempt organization				0.00
(4)	Gross investment income				0.00

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)****1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ►  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

CHRISTOPHER WORTHLEY 777 SAN MARIN DRIVE, A21 NOVATO, CA 94998-1320 (301) 408-8195

b The form in which applications should be submitted and information and materials they should include:

**WRITTEN REQUEST WITH PROOF OF ORGANIZATION'S TAX EXEMPT STATUS**

c Any submission deadlines:

NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

**SEE ATTACHED GIVING GUIDELINES**

**Part XV Supplementary Information (continued)****3. Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>Name and address (home or business)</b>				
<b>a Paid during the year</b>				
SEE SCHEDULE ATTACHED				427,500
<b>Total</b>				► 3a 427,500.00
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				► 3b 0.00

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income	Excluded by section 512, 513, or 514	(e) Related or exempt function income (See instructions )		
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b>	<b>Program service revenue</b>					<b>g</b> Fees and contracts from government agencies
a						
b						
c						
d						
e						
f						
<b>2</b>	<b>Membership dues and assessments</b>					
<b>3</b>	<b>Interest on savings and temporary cash investments</b>					
<b>4</b>	<b>Dividends and interest from securities</b>					
<b>5</b>	<b>Net rental income or (loss) from real estate</b>					
a	Debt-financed property					
b	Not debt-financed property					
<b>6</b>	<b>Net rental income or (loss) from personal property</b>					
<b>7</b>	<b>Other investment income</b>					
<b>8</b>	<b>Gain or (loss) from sales of assets other than inventory</b>					
<b>9</b>	<b>Net income or (loss) from special events</b>					
<b>10</b>	<b>Gross profit or (loss) from sales of inventory</b>					
<b>11</b>	<b>Other revenue:</b> a					
b						
c						
d						
e						
<b>12</b>	<b>Subtotal Add columns (b), (d), and (e)</b>		0.00		0.00	0.00
<b>13</b>	<b>Total Add line 12, columns (b), (d), and (e)</b>				13	0.00

(See worksheet in line 13 instructions to verify calculations.)

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of.		
(1)	Cash	X	
(2)	Other assets	X	
b	Other transactions		
(1)	Sales of assets to a noncharitable exempt organization		
(2)	Purchases of assets from a noncharitable exempt organization		
(3)	Rental of facilities, equipment, or other assets		
(4)	Reimbursement arrangements		
(5)	Loans or loan guarantees		
(6)	Performance of services or membership or fundraising solicitations		
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		
1a(1)		X	
1a(2)		X	
1b(1)		X	
1b(2)		X	
1b(3)		X	
1b(4)		X	
1b(5)		X	
1b(6)		X	
1c		X	

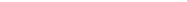
**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  Yes  No

**b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

**Sign  
Here**

correct, and complete Declaration of preparer (other than  
► 

18/5  
Date

15) Director-Tax  
Title

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

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ►	Firm's EIN ►			Phone no
	Firm's address ►				

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

**2014**► Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**Name of the organization**

ALLIANZ FOUNDATION FOR NORTH AMERICA

**Employer identification number**

68-0493856

**Organization type (check one):****Filers of:****Section:**

Form 990 or 990-EZ

 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation 527 political organization

Form 990-PF

 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation**Check if your organization is covered by the General Rule or a Special Rule.****Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year. ► \$ .....

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

## Name of organization

ALLIANZ FOUNDATION FOR NORTH AMERICA

## Employer identification number

68-0493856

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALLIANZ SE KONIGINSTRASSE 28 MUNCHEN Foreign State or Province _____ Foreign Country: Germany _____	\$ 427,480	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

Name of organization

ALLIANZ FOUNDATION FOR NORTH AMERICA

Employer identification number

68-0493856

**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	-----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	-----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	-----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	-----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	-----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	-----	\$ -----	-----



ALLIANZ FOUNDATION FOR NORTH AMERICA  
CALENDAR YEAR 2014  
FORM 990-PF, PAGE 11, PART XV, ITEM 3a

68-0493856

**CONTRIBUTIONS TO CHARITABLE ORGANIZATIONS**

	<b><u>RECIPIENTS NAME AND ADDRESS</u></b>	<b><u>AMOUNT</u></b>
	<b>a) Paid During the Year</b>	
1	Keystone Community Services 2000 St Anthony Ave. St Paul, MN 55104	\$50,000
2	Girls for a Change East Coast Office Trinity Family Life Center 3601 Dill Road Richmond, VA 23222	\$50,000
3	At the Crossroads 333 Valencia St., Suite 320 San Francisco, CA 94103	\$50,000
4	Junior Achievement of Greater New York 420 Lexington Ave #205 New York, NY 10170	\$50,000
5	Soliya 6 East 39th St. Suite 301 New York, NY 10016	\$50,000
6	YouthBridge-NY 225 West 34th St., Suite 1607 (14 Penn Plaza) New York, NY 10122	\$50,000
7	One Million Degrees 226 W Jackson Blvd #528 Chicago, IL 60606	\$25,000
8	Achieve Minneapolis 111 Third Avenue South, Suite 5 Minneapolis, MN 55401	\$12,500
9	Chicago Lights 126 E. Chestnut St. Chicago, IL 60611	\$12,500
10	CITYarts 525 Broadway Suite 602 New York, NY 10012	\$12,500

ALLIANZ FOUNDATION FOR NORTH AMERICA  
CALENDAR YEAR 2014  
FORM 990-PF, PAGE 11, PART XV, ITEM 3a

68-0493856

**CONTRIBUTIONS TO CHARITABLE ORGANIZATIONS**

	<b><u>RECIPIENTS NAME AND ADDRESS</u></b>	<b><u>AMOUNT</u></b>
	<b>a) Paid During the Year</b>	
11	Fiver Children's Foundation 519 8th Ave. 24th Floor New York, NY 10018	\$12,500
12	Fundacion pro Ninos de la Calle Zaragoza 277, Col. Guerrero, Delegación Cuauhtémoc, 06300, México D.F.	\$12,500
13	CITYarts 525 Broadway Suite 602 New York, NY 10012	\$10,000
14	Fiver Children's Foundation 519 8th Ave. 24th Floor New York, NY 10018	\$10,000
15	Great River Greening 35 West Water Street, #201 Saint Paul, MN 55107	\$10,000
16	LearnServe International P.O. Box 6203 Washington, DC 20015	\$10,000
	<b>TOTAL 2014 CHARITABLE CONTRIBUTIONS</b>	<b><u>\$427,500</u></b>

ALLIANZ FOUNDATION FOR NORTH AMERICA  
CALENDAR YEAR 2014  
FORM 990-PF, PAGE 6, PART VIII  
OFFICERS AND BOARD MEMBERS

68-0493856

NAME	TITLE	COMPENSATION
Emilio Galli-Zugaro	Executive Vice President/ BM	0
Kevin Walker	CFO/BM	0
Christopher Worthley	Executive Director / BM	0
Terry Griffith	Secretary	0
Jeffery Johnson	Treasurer	0
Jeannette Wong	Ass't Treasurer	0
		<u><u>\$0</u></u>

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Responsibility > Allianz Foundation for North America: Allianz Foundation for North America

## Allianz Foundation for North America



**The Allianz  
Foundation for North  
America empowers  
young people to shape  
a secure future.**

### Mission and Structure

The financial services companies of the worldwide Allianz Group share a fundamental concern for safeguarding the future. In all areas of their business, Allianz Group companies find a common purpose in empowering people to manage risks and plan well for the future, and they do this in the interest of numerous stakeholders - customers, employees, shareholders and society itself. Working to safeguard the future is what Allianz companies do best, it is the heart of the Allianz Group's business.

Established in 2002, the Allianz Foundation for North America joined an international network of Allianz Group foundations working to apply this shared concern for safeguarding the future to challenges faced by society at large. This network includes, for example, the Allianz Foundation for Sustainability, dedicated to responsible environmental management, and the Allianz Cultural Foundation, which, through the arts, works to promote intercultural dialogue and cooperation among young people in Europe.

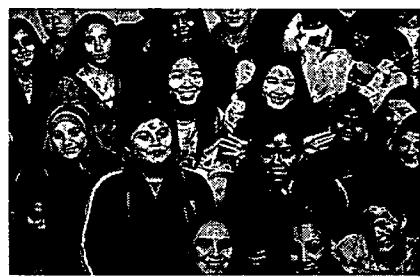
In addressing concerns for the future in North America, we believe one of the most significant social investments we can make is one in the ability of young people to live up to their fullest potential and pursue independent lives of leadership and public service. The mission of the Allianz Foundation for North America

- is to empower young people to shape a secure future for themselves and for the communities in which they live.

The Foundation is committed to creating sustainable social value by partnering with programs that help young people develop the skills, motivation, perspectives and opportunities they need to be successful, self-reliant and socially conscious members of society. We also seek to facilitate dialogue and networking among our diverse not-for-profit partners so that together we can maximize the social impact of our work.

A 501 (c) (3) entity under the United States Internal Revenue Code, the Allianz Foundation for North America welcomes grant applications from non-profit organizations working to empower young people to shape a secure future.

## Current Projects



The Allianz Foundation for North America engages in project partnerships in metropolitan areas coast to coast. In order to offer special opportunities for youth development, such as mentoring and in-office career skills workshops, our grant making has an exclusive focus on cities in which Allianz companies maintain head- or major representative offices. As new projects are added, the Foundation will work with not-for-profit partners in these cities to empower young people throughout North America to shape a secure future for themselves and the communities in which they live.

**Keystone Community Services**

**At The Crossroads**

**Girls For A Change**

**Girls Incorporated (Girls Inc.)**

**Junior Achievement of New York**

**Pro Niños de la Calle**

**CITYarts**

**AchieveMpls**

AZFNA is supporting Keystone Community Services, a not-for-profit organization with numerous community-based programs focused on improving the quality of life of underserved individuals and families in greater St. Paul, MN, in expanding their Youth Express program. Youth Express develops the talent and potential of at-risk youth from low-income families (ages 14-18), by engaging participants in a social-enterprise model of employment training and apprenticeships at two youth-directed enterprises, Express Bike Shop and Express Yourself Clothing. Participants receive a combination of training, coaching and hands-on experience in which they learn key entrepreneurial and business concepts, while simultaneously learning how to operate and develop a business. The AZFNA grant makes it possible for an additional 50 adolescents to take part in the program, creates new opportunities for paid apprenticeships at existing businesses and not-for-profit organizations, and allows for the development of an additional youth-directed enterprise in future.

<http://www.keystoneservices.org/>

Chicago City Lights

Fiver

Soliya

**Emerging Leaders in  
Environment and  
Energy Policy (ELEEP)**

Lawrence Hall Youth  
Services

Boys and Girls Club of  
the Twin Cities

Project for Pride in  
Living, Inc.

One Million Degrees

Virginia Council of  
Economic Education

## **Giving Guidelines**

### **Supporting Program Development**

The Allianz Foundation for North America empowers young people to shape a secure future by partnering with programs that support youth in developing the skills, motivation, perspectives and opportunities they need to lead successful, independent lives of leadership and public service. In all cases, the Foundation's goal is to serve as an impetus for the creation, expansion or enhancement of sustainable youth programs eligible for continued, long-term funding from other sources.

### **Criteria for Funding**

All programs and projects for which funding is sought must attend to each of seven, equally weighted criteria drawn from the

mission and goals of the Allianz Foundation for North America  
Specifically, all proposed programs/projects must.

1. Empower young people
2. To shape a secure future
- 3 For themselves
- 4 And the communities in which they live,
- 5 By helping them become successful,
- 6 Self-reliant, and
- 7 Socially conscious

Please note that, in order to be able to offer special opportunities for youth development, such as mentoring and in-office career skills workshops, our project-related grant making is focused exclusively on cities in which Allianz companies in the NAFTA region maintain head- or major representative offices. These cities are:

- New York (NY)
- Washington (DC)
- Chicago (IL)
- Minneapolis (MN)
- San Francisco (CA), including also Marin and Sonoma Counties
- Newport Beach (CA)
- San Diego (CA)
- Richmond (VA)

Please also note that priority is given to not-for-profit organizations that are likely to take part in the Allianz Foundation Fellowship Program – see separate program information – after the first proposed grant year. We strongly recommend incorporating a brief but clear vision for such participation into all project proposals.

## **Grant Cycle**

The Allianz Foundation for North America awards 12-month grants once each year, following the annual meeting of the Foundation's Board of Directors, which generally takes place in the late autumn. Grant applicants are notified of action taken by the Board within one week of the annual meeting. Disbursement

- · · of all allocated funds to grant recipients follows immediately thereafter.

## Grant Range

Grants for program development involve a significant medium-term financial commitment at the discretion of the Foundation Board. Given the limited availability of funds and the broad scope of the Foundation's work throughout North America, grants generally do not exceed – but are also usually not less than – 50,000 US dollars, the standard allocation for each new project grant. All applicants are strongly advised to think and plan in terms of this standard grant amount. Final decisions on grants are based on available funding and a thorough analysis of program need, structure and potential for sustainable social impact.

## Funding Period

Grants are eligible for renewal at a lower level of financial commitment after the first year in order to maintain program development while other sources of – and/or solutions for – long-term funding are sought. In general, renewal grants for each successive year, if approved, will not exceed 50 percent of the previous year's grant total. Grants generally may not be renewed for more than two consecutive years following the first-year grant. Our project partners are, however, always welcome to apply for new project grants in the future.

## Limitations

The Allianz Foundation for North America does not provide support for:

- Individuals
- Political parties, candidates or partisan political organizations
- General public-sector services
- Sectarian religious purposes (e.g., religious instruction, proselytizing)
- Fraternal, veteran or sectarian groups serving only or primarily their own constituencies
- Fundraising events
- Conferences and workshops
- Trips or tours
- Capital campaigns
- Endowment funds
- Medical research
- Sporting events
- Subscription fees or admission tickets

## Application Procedures

**The following forms must be used for all submissions**

Grant Application Form

Contact and Concept Form

**Deadlines**

The final deadline for receipt of Contact/Concept forms is **July 15<sup>th</sup>**. These forms may be submitted at any time after January 1<sup>st</sup> for the current year and will be processed as soon as possible after submission. Following approval of the Contact/Concept form – and only after approval – the application form and supporting materials must be submitted by **September 5<sup>th</sup>**. Typically, the foundation board meets to take action on new applications in late autumn.

**Preliminary Concept Paper**

All grant seekers must submit a Contact/Concept form before submitting a grant application. This enables us to offer preliminary feedback on the project proposal and clear guidance on subsequent steps in the application process. Each Contact/Concept form must include a clear, concise description of the plan for the creation, expansion or enhancement of a particular project or program component that would be made possible with a grant of 50,000 US dollars, our standard, first-year project grant. The opportunity to discuss a preliminary concept paper is intended to help protect valuable resources of time and money at not-for-profit organizations by ensuring – before submission – that grant applications adequately fit our mission and guidelines.

All Contact/Concept forms must be submitted by email, using the subject line "Contact/Concept Form". Please ensure that the content of the Contact/Concept form is properly saved before sending. If necessary, you may complete, print, scan and then email the Contact/Concept form.

**Final Application Package**

Upon approval of the Contact/Concept form, grant seekers may, at the discretion of the Foundation's Executive Director, submit a final, grant application package, using the standardized, PDF application form found above and including all supplementary materials listed at the end of the form. Final applications must be submitted by email, using the subject line "Final Application".

**Contact**

- To learn more about the work of the Allianz Foundation for North America, or to submit a Contact/Concept form, please use the contact information below

Please also remember to use the appropriate email subject line(s) for all correspondence, as outlined above. Additionally, please note that the person listed in the Contact/Concept and/or Application forms will be the recipient of all future correspondence related to the grant applications. There can be only one primary contact per grant applicant.

## Allianz Foundation Fellowship Program

The mission of the Allianz Foundation for North America is to empower young people to shape a secure future for themselves and the communities in which they live by helping them become successful, self-reliant and socially conscious.

As part of our effort to promote social consciousness among young leaders – tomorrow's community, national and world leaders – the Foundation established the Allianz Foundation Fellowship Program. This program enables gifted and motivated young people to take part in a short-term learning experience in the not-for-profit sector. Fellowships are generally made available for the summer months. However, not-for-profit organizations applying for Fellowship funding may also do so to create carefully structured learning experiences for young people during the academic year. We believe that, by engaging in an intensive learning experience with appropriate adult mentors at a not-for-profit organization, young people will further develop key life skills – including an ability to work well with people of different ages and backgrounds – and also enhance their own knowledge of important social issues. Furthermore, as future leaders in both the public and private sectors, Allianz Foundation Fellows are able to help raise public awareness of the critical role not-for-profit and nongovernmental organizations play in creating positive social change.

The Allianz Foundation Fellowship Program provides funding to a limited number of 501 (c) (3) organizations – selected by application – so that they may create one or more Fellowship learning sites at appropriate venues within their organizations. Allianz Foundation Fellows are recruited and selected directly by the not-for-profit organizations whose applications for Fellowship funding have been approved by the Allianz Foundation. Above and beyond the learning and networking opportunities created by their own not-for-profit Fellowship site, all Allianz Foundation Fellows will have access to professional networking opportunities through Allianz companies in their area and, if possible, will be offered an opportunity to meet with a board member of the Allianz Foundation for North America to discuss their not-for-profit learning experience.

## Eligibility

Any not-for-profit organization that has received a grant from the Allianz Foundation for North America at any time is eligible to apply for funding to create an Allianz Foundation Fellowship learning site within their organization. Young people who have successfully participated in a program supported by the Allianz Foundation are eligible to become Allianz Foundation Fellows at the not-for-profit in which their program was located. The Allianz Foundation Fellowship program is intended for rising high school seniors and recent graduates, including participants in and graduates of GED programs, as well as students who have completed no more than one year of post-secondary education. Fellows may, at the discretion of the not-for-profit organization overseeing their learning experience, take part in more than one Fellowship period. It is expected, however, that even the most dedicated and successful Fellows will participate in no more than three consecutive Fellowship learning experiences to maximize opportunities for other young people to take part as well.

## Fellowship Structure

Each Allianz Foundation Fellowship package consists of a single 10,000 US dollar grant made to each 501 (c) (3) not-for-profit organization whose application for funding to create a Fellowship site has been approved by the Allianz Foundation. Not-for-profit organizations may apply for only one Fellowship package at a time but may structure Fellowships to accommodate between one and five Allianz Foundation Fellows during the scheduled Fellowship period.

From the total grant amount, Allianz Foundation Fellows will receive individual stipends for the full Fellowship period at the appropriate discretion of the not-for-profit Fellowship site. Any remaining sum shall be used to offset costs associated with maintaining an intensive, meaningful and well-guided learning experience for each Fellow (e.g., any relevant costs associated with providing appropriate mentoring during the Fellowship period).

Each not-for-profit organization seeking funding to create a Fellowship site should designate one staff member as Program Coordinator to serve as the central liaison between the Allianz Foundation, not-for-profit management and program staff, and the Allianz Foundation Fellows themselves.

## Application Procedures

The Allianz Foundation Fellowship program is intended to make available to gifted and motivated young people an intensive, meaningful and well-guided learning experience in the not-for-profit environment. With this central goal in mind, not-for-profit

organizations may apply for funding to create one or more Allianz Foundation Fellowship learning sites within their organization.

Non-profit organizations interested in creating an Allianz Foundation Fellowship site should first designate one staff member to serve as Program Coordinator (central liaison for the Allianz Foundation, not-for-profit management and program staff, and the Allianz Foundation Fellows within their organization).

The designated Program Coordinator in each not-for-profit organization should notify the Allianz Foundation's Executive Director by email of their intention to apply for Fellowship funding – using the subject line "Allianz Foundation Fellowship" for all correspondence – and submit to the Allianz Foundation a letter of intent that includes each of the following:

1. A detailed explanation of how the proposed Fellowship funds would be used to create an intensive, meaningful and well-guided learning experience for one or more young people in keeping with the Allianz Foundation Fellowship's eligibility requirements;
2. An explanation of one or more core learning areas to which Fellows would be exposed (e.g., not-for-profit administration, programming, finance, fundraising/development);
3. The proposed timeframe for the Fellowship period (e.g., July-August, September-December);
4. Designation of at least one staff-member who will serve as supervisor and mentor to Fellows throughout the Fellowship period;
5. A clear commitment to weekly mentoring sessions with each Fellow (at least one hour per week to discuss such issues as learning edges, overall experiences at the learning site, and insights gained into not-for-profit work);
6. A clear commitment to having mentors available for ongoing support and guidance for all Fellows as needed and appropriate;
7. Definition of an in-depth learning project – relevant to each Fellow's core learning area(s) – that shall be completed during the Fellowship period.

The learning project should enable each Fellow or team of Fellows to practice leadership skills and teamwork while advancing their knowledge of their core learning area(s) within the non-profit environment.

## **Supplementary Documentation**

- Together with their letters of intent, all Program Coordinators must submit documentation of their not-for-profit organization's continued status as a 501 (c) (3) entity under the United States Internal Revenue Code. The deadline for all Fellowship applications for the current year is **April 15<sup>th</sup>**.

## Progress Reporting

If his or her organization has been approved for Fellowship funding, the Program Coordinator must submit to the Allianz Foundation a one-page, mid-term report – roughly halfway through the scheduled Fellowship period – describing the experiences and progress of Fellows at each learning site within their organization. The mid-term report should be based directly on feedback from Fellows and their mentors.

Additionally, Program Coordinators and not-for-profit mentors are encouraged to facilitate a meeting for Fellows with the executive director or other appropriate senior executive(s) of the not-for-profit organization toward the end of the Fellowship period to discuss the student's learning experiences and other relevant issues of interest related to the not-for-profit sector

Finally, each Program Coordinator must submit to the Allianz Foundation a final report of no fewer than three and no more than five narrative pages summarizing the experiences and feedback of all Allianz Foundation Fellows and mentors within their organization. The final report should discuss the results of individual learning projects and include anecdotal evidence – e.g., quotes – reflecting the Fellows' learning experiences, growth edges and insights gained into the role of not-for-profit organizations in society. It is strongly recommended that final reports be based on personal interviews and/or in-depth discussions with Fellows and mentors. Final reports must also include a detailed appendix showing how all Fellowship funds were allocated, e.g., with regard to stipends and costs associated with appropriate mentoring

## Contact Information

For further information on the Allianz Foundation Fellowship program, or to apply for funding to create a Fellowship learning site within your 501 (c) (3) not-for-profit organization, please use the contact information below

Please also remember to use the subject line "Allianz Foundation Fellowship" for all correspondence related to this program

## Contact

**Christopher Worthley**

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