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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation The Surplus Line Association of Arizona Foundation % Foundation Source		A Employer identification number 86-6320000	
Number and street (or P O box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd		B Telephone number (see instructions) (800) 839-1754	
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		C If exemption application is pending, check here	
G Check all that apply ☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 6,523,071		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify)			

Part I Analysis of Revenue and Expenses		Revenue and expenses per books	Net investment income	Adjusted net income	Disbursements for charitable purposes
		(a)	(b)	(c)	(d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	729,500			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	15	15		
	4 Dividends and interest from securities	39,682	39,682		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-442			
	b Gross sales price for all assets on line 6a	97,253			
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	240,685	240,685		
	12 Total.Add lines 1 through 11	1,009,440	280,382		
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	4,956			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	29,904			29,904
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	34,860	0		29,904
	25 Contributions, gifts, grants paid	531,500			531,500
	26 Total expenses and disbursements.Add lines 24 and 25	566,360	0		561,404
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	443,080			
	b Net investment income (if negative, enter -0-)		280,382		
	c Adjusted net income(if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			Beginning of year	End of year	
					(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments			44,381	236,302	236,302
	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)			316,817	316,817	312,721
	b	Investments—corporate stock (attach schedule)					
	c	Investments—corporate bonds (attach schedule)			737,402	747,876	744,257
	11	Investments—land, buildings, and equipment basis ▶ _____					
		Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans.					
	13	Investments—other (attach schedule)			4,743,664	4,984,349	5,229,791
	14	Land, buildings, and equipment basis ▶ _____					
		Less accumulated depreciation (attach schedule) ▶ _____					
	15	Other assets (describe ▶ _____)					
	16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)			5,842,264	6,285,344	6,523,071

Liabilities	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	Total liabilities(add lines 17 through 22)				0	

Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐		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 ▶ ☒		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			5,842,264	6,285,344	
	30	Total net assets or fund balances(see instructions)			5,842,264	6,285,344	
	31	Total liabilities and net assets/fund balances(see instructions)			5,842,264	6,285,344	

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	5,842,264
2	Enter amount from Part I, line 27a	2	443,080
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	6,285,344
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	6,285,344

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	Publicly-traded Securities			
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 97,253		97,695	-44 2
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a			-44 2
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	-44 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? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see 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))
2014	507,625	6,189,942	0 082008
2013	508,447	6,095,464	0 083414
2012	454,887	5,993,418	0 075898
2011	326,225	5,858,765	0 055682
2010	103,652	5,294,120	0 019579

2	Total of line 1, column (d).	2	0 316581
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	0 063316
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	6,358,013
5	Multiply line 4 by line 3.	5	402,564
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,804
7	Add lines 5 and 6.	7	405,368
8	Enter qualifying distributions from Part XII, line 4.	8	561,404

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 page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐			
		and enter "N/A" on line 1			
		Date of ruling or determination letter _____			
		(attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	2,804
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	2,804
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,804
6		Credits/Payments			
a	2015 estimated tax payments and 2014 overpayment credited to 2015		6a	3,000	
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	3,000
8		Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	196
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 196 Refunded		11	

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	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?			No
	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.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
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? If "Yes," attach a detailed description of the activities.	2		No
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? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
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?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) AZ _____			
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? If "No," attach explanation .	8b	Yes	
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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address	13	Yes	
14	The books are in care of Foundation Source Telephone no (800) 839-1754 Located at 501 Silverside Road Suite 123 Wilmington DE ZIP+4 198091377			
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 2015, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country	16	Yes	No

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).	☐ Yes ☒ 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)? Organizations relying on a current notice regarding disaster assistance check here.	☐ Yes ☒ No	1b	
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 2015?	☐ Yes ☒ No	1c	No
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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years 20 , 20 , 20 , 20	☐ Yes ☒ No		
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).		2b	
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?	☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2015 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 2015.).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
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 2015?		4b	No

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes

☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes

☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes

☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

☐ Yes

☒ 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?

☐ Yes

☒ 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)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

☐

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?

☐ Yes

☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes

☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes

☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances

Total

number of other employees paid over \$50,000.

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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

Total number of others receiving over \$50,000 for professional services. ▶

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	
Total. Add lines 1 through 3. ▶	

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	1,055,696
b	Average of monthly cash balances.	1b	95,908
c	Fair market value of all other assets (see instructions).	1c	5,303,232
d	Total (add lines 1a, b, and c).	1d	6,454,836
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	0
3	Subtract line 2 from line 1d.	3	6,454,836
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	96,823
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,358,013
6	Minimum investment return. Enter 5% of line 5.	6	317,901

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	317,901
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	2,804
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,804
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	315,097
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	315,097
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	315,097

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	561,404
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		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	561,404
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).	5	2,804
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	558,600

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				315,097
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 2013 , 2012 , 2011				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				193,552
e From 2014.				204,024
f Total of lines 3a through e.	397,576			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 561,404				
a Applied to 2014, 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 2015 distributable amount.				315,097
e Remaining amount distributed out of corpus	246,307			
5 Excess distributions carryover applied to 2015 (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	643,883			
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
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).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	643,883			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				193,552
d Excess from 2014.				204,024
e Excess from 2015.				246,307

Part XIV

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

b 85% of line 2a

d Amounts included in line 2c not used directly for active conduct of exempt activities

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .

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). . . .

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV

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

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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	531,500
b Approved for future payment				
Total			3b	

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		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments			14	15		
4 Dividends and interest from securities.			14	39,682		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			18	-442		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a <u>ANNUITY INCOME</u>			14	240,685		
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e).				279,940		
13 Total. Add line 12, columns (b), (d), and (e).						279,940

(See worksheet in line 13 instructions to verify calculations)

[illegible]

l. 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?

a Transfers from the reporting foundation to a noncharitable exempt organization of

(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No

b Other transactions

(1) Sales of assets to a noncharitable exempt organization.	1b(1)	No
--	--------------	-----------

(2) Purchases of assets from a noncharitable exempt organization.	1b(2)	No
--	--------------	-----------

(3) Rental of facilities, equipment, or other assets.	1b(3)	No
--	--------------	-----------

(4) Reimbursement arrangements.	1b(4)	No
--	--------------	-----------

(5) Loans or loan guarantees.	1b(5)	No
---------------------------------------	-------	----

(6) Performance of services or membership or fundraising solicitations.	1b(6)	No
---	-------	----

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c	No
--	-----------	-----------

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.

[illegible]

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

**Sign
Here**

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.

***** 2016-09-29 *****

 Signature of officer or trustee Date Title
 May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Paid Preparer Use Only	Print/Type preparer's name Jeffrey D Haskell	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01345770
	Firm's name ☐ Foundation Source			Firm's EIN ☐	
	Firm's address ☐ One Hollow Ln Ste 212 Lake Success, NY 11042			Phone no (800) 839-1754	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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	Expense account, (e) other allowances
Marc Adler 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
T Curtis Anderson 	VP 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Larry Beach 	Sec / Treas 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Karla Burt 	Dir 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Timothy Downey 	Pres 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Lanny Hair 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Erick L Johnson CPCU 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Konnie Keaschall-Kiser 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Gerald L Silver 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
J SCOTT WEDE 	EXEC DIR 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
Ronda Lofton 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				
James Mann 	Dir 1 0	0	0	0
Foundation Source 501 Silverside Rd Wilmington, DE 198091377				

Form 990PF Part XV Line 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
Name and address (home or business)				
a Paid during the year				
100 CLUB OF ARIZONA 333 N 44TH ST STE 100 PHOENIX,AZ 85008	N/A	PC	General & Unrestricted	15,000
88-CRIME INC 32 N STONE AVE STE 1400 TUCSON,AZ 85701	N/A	PC	General & Unrestricted	3,000
AAMGA EDUCATION FOUNDATION 150 S WARNER RD STE 156 KING OF PRUSSIA,PA 19406	N/A	PC	General & Unrestricted	100,000
ABT PERFORMING ARTS ASSOCIATION INC 7701 W PARADISE LN PEORIA,AZ 85382	N/A	PC	General & Unrestricted	5,000
AMERICAN CANCER SOCIETY - GREAT WEST DIVISION 1636 N SWAN RD TUCSON,AZ 85712	N/A	PC	General & Unrestricted	2,500
AMYOTROPHIC LATERAL SCLEROSIS ASSOCIATION 4643 E THOMAS RD STE 1 PHOENIX,AZ 85018	N/A	PC	General & Unrestricted	5,000
ARIZONA COMMUNITY FOUNDATION 2201 E CAMELBACK RD STE 405B PHOENIX,AZ 85016	N/A	PC	General & Unrestricted	2,500
ARIZONA DIABETES FOUNDATION INC GREENWAY PROFESSIONAL BLDG PHOENIX,AZ 85032	N/A	PC	General & Unrestricted	5,000
ARTHRITIS FOUNDATION INC - PHOENIX CHAPTER 1221 E OSBORN RD STE 201 PHOENIX,AZ 85014	N/A	PC	General & Unrestricted	5,000
ASSISTANCE LEAGUE OF TUCSON INC 1307 N ALVERNON WAY TUCSON,AZ 85712	N/A	PC	General & Unrestricted	5,000
AUTISM SOCIETY OF GREATER PHOENIX PO BOX 10543 PHOENIX,AZ 85064	N/A	PC	General & Unrestricted	10,000
BANNER ALZHEIMERS FOUNDATION 2025 N 3RD ST STE 250 PHOENIX,AZ 85004	N/A	PC	General & Unrestricted	10,000
BOY SCOUTS OF AMERICA 2969 N GREENFIELD RD PHOENIX,AZ 85016	N/A	PC	General & Unrestricted	5,000
BOYS HOPE GIRLS HOPE 4225 MALSBARY RD STE 208 BLUE ASH,OH 45242	N/A	PC	General & Unrestricted	3,000
CAMELBACK KIWANIS SERVICE FUND 7220 N 16TH ST STE I PHOENIX,AZ 85020	N/A	PC	General & Unrestricted	5,000
Total			3a	531,500

Form 990PF Part XV Line 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
Name and address (home or business)				
a Paid during the year				
COMMUNITY FOOD BANK INC 3003 S COUNTRY CLUB RD TUCSON,AZ 85713	N/A	PC	General & Unrestricted	30,000
DEREK HUGHES NAPSLO EDUCATIONAL FOUNDATION INC 4131 N MULBERRY DR STE 200 KANSAS CITY,MO 64116	N/A	PC	General & Unrestricted	100,000
DESERT SURVIVORS INC 1020 W STARR PASS BLVD TUCSON,AZ 85713	N/A	PC	General & Unrestricted	5,000
DODADS INC 12237 N MAKAYLA CANYON LN ORO VALLEY,AZ 85755	N/A	PC	General & Unrestricted	5,000
HACIENDA SNF INC 1402 E S MOUNTAIN AVE PHOENIX,AZ 85042	N/A	PC	General & Unrestricted	15,000
INSURANCE TRAINING AND EDUCATION CENTER INC 2828 N 36TH ST PHOENIX,AZ 85008	N/A	PC	General & Unrestricted	50,000
KITCHEN ON THE STREET INC 2650 E MOHAWK BLDG 3 STE 168 PHOENIX,AZ 85050	N/A	PC	General & Unrestricted	15,000
LEADERSHIP WORKSHOPS FOUNDATION FOR YOUTH AND FAMI 8711 E PINNACLE PEAK RD STE F101 SCOTTSDALE,AZ 85255	N/A	PC	General & Unrestricted	5,000
MAKE A WISH FOUNDATION OF ARIZONA INC 2901 N 78TH ST SCOTTSDALE,AZ 85251	N/A	PC	General & Unrestricted	10,000
ORAL EDUCATIONAL OPPORTUNITIES FOR THE HEARING IMP 3426 E SHEA BLVD PHOENIX,AZ 85028	N/A	PC	General & Unrestricted	12,500
PAZ DE CRISTO COMMUNITY CENTER 424 W BROADWAY RD MESA,AZ 85210	N/A	PC	General & Unrestricted	12,000
PLUS FOUNDATION 5353 WAYZATA BLVD STE 600 MINNEAPOLIS,MN 55416	N/A	SO I	General & Unrestricted	15,000
RYAN HOUSE 110 W MERRELL ST FL 1 PHOENIX,AZ 85013	N/A	PC	General & Unrestricted	2,500
SHRINERS HOSPITALS FOR CHILDREN - SALT LAKE CITY FAIRFAX RD AT VIRGINIA ST SALT LAKE CITY,UT 84103	N/A	PC	General & Unrestricted	5,000
SOJOURNER CENTER PO BOX 20156 PHOENIX,AZ 85036	N/A	PC	General & Unrestricted	5,000
Total				531,500

Form 990PF Part XV Line 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
Name and address (home or business)				
a <i>Paid during the year</i>				
SOUTHWEST DISTRICT KIWANIS FOUNDATION PO BOX 1603 MESA,AZ 85211	N/A	PC	General & Unrestricted	15,000
ST MARYS FOOD BANK ALLIANCE 2831 N 31ST AVE PHOENIX,AZ 85009	N/A	PC	General & Unrestricted	15,000
TUMBLEWEED CENTER FOR YOUTH DEVELOPMENT 3707 N 7TH ST STE 30 PHOENIX,AZ 85014	N/A	PC	General & Unrestricted	6,000
UNITED SERVICE ORGANIZATIONS INC PO BOX 96860 WASHINGTON,DC 20077	N/A	PC	General & Unrestricted	2,500
WASTE NOT INC 1700 N GRANITE REEF RD SCOTTSDALE,AZ 85257	N/A	PC	General & Unrestricted	15,000
YES SOLUTIONS INC 549 W 123RD ST NEW YORK,NY 10027	N/A	PC	General & Unrestricted	10,000
Total			3a	531,500

TY 2015 Compensation Explanation

Name: The Surplus Line Association of Arizona
Foundation
EIN: 86-6320000

Person Name	Explanation
Karla Burt	*Removed from foundation in 2015

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Depreciation Schedule

Name: The Surplus Line Association of Arizona
Foundation
EIN: 86-6320000

TY 2015 Investments Corporate Bonds Schedule

Name: The Surplus Line Association of Arizona
Foundation

EIN: 86-6320000

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ANHEUSER-BUSCH INBEVFIN NT - 2	40,047	38,485
BANK AMER - 5.150% - 11/15/201	25,673	26,647
BANK OF AMERICA - 3.550% - 11/	20,000	20,269
BURLINGTON NORTHERN SANTA FE -	54,372	54,073
CATERPILLAR FINANCIAL SE MTN -	27,118	27,301
CATERPILLAR FINL CORP PWRNTSBE	30,000	30,135
CITIGROUP INC - 5.500% - 09/13	28,857	27,275
CITIGROUP INC SUB NT - 3.500%	24,065	24,489
DEUTSCHE BANK - 3.250% - 01/11	51,027	50,027
GE - 5.000% - 03/15/2029	55,230	54,980
GE CAPITAL - 4.800% - 03/15/20	11,967	12,911
GE CAPITAL CORP - 4.500% - 11/	27,075	26,920
GE CAPITAL INTERNOTES - 5.100%	26,765	27,075
GENERAL ELECTRIC CAPITAL CORP	25,722	25,989
GOLDMAN SACHS GP INC - 5.950%	32,165	33,371
GOLDMAN SACHS GROUP INC - 3.50	11,770	11,449
GOLDMAN SACHS GRP INC MTN BE -	25,249	25,244
HANCOCK JOHN LIFE INS CO - 5.0	17,689	17,443
JPMORGAN CHASE & CO - 4.125% -	25,267	24,967
MERRILL LYNCH MTN BE - 6.400%	27,829	26,839

Name of Bond	End of Year Book Value	End of Year Fair Market Value
SHELL INTERNATIONAL FIN - 4.30	53,402	53,289
STATOIL ASA - 3.125% - 08/17/2	25,573	25,611
STATOIL ASA NT - 3.700% - 03/0	26,045	25,316
WAL MART STORES INC NT - 5.800	28,280	27,356
ZIMMER HLDGS INC NOTE - 4.625%	26,689	26,796

TY 2015 Investments Government Obligations Schedule

Name: The Surplus Line Association of Arizona
Foundation

EIN: 86-6320000

**US Government Securities - End of
Year Book Value:** 27,974

**US Government Securities - End of
Year Fair Market Value:** 28,592

**State & Local Government
Securities - End of Year Book
Value:** 288,843

**State & Local Government
Securities - End of Year Fair
Market Value:** 284,129

TY 2015 Investments - Other Schedule

Name: The Surplus Line Association of Arizona
Foundation

EIN: 86-6320000

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
JACKSON NATIONAL LIFE ANNUITY		581,055	581,055
COLUMBUS LIFE # CM5040241A		479,084	502,260
COLUMBUS LIFE - POLICY # CM504		286,447	346,296
COLUMBUS LIFE CM5037899A		276,728	297,228
COLUMBUS LIFE CM5037917A		278,620	313,671
COLUMBUS LIFE CM5037965A		282,135	352,295
COLUMBUS LIFE CM5064902A		146,238	144,701
JACKSON NATION LIFE ANNUITY #		273,114	341,608
JACKSON NATIONAL ANNUITY 10062		262,579	271,452
JACKSON NATIONAL LIFE #1003556		276,650	282,203
JACKSON NATIONAL LIFE 10047137		354,657	354,657
INTEGRITY LIFE INSURANCE ANNUI		950,110	873,388
NY LIFE INSURANCE ANNUITY #521		244,921	244,921
UNITED OF OMAHA LIFE INSURANCE		292,011	324,056

TY 2015 Other Expenses Schedule

Name: The Surplus Line Association of Arizona
Foundation
EIN: 86-6320000

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	29,904			29,904

TY 2015 Other Income Schedule

Name: The Surplus Line Association of Arizona
Foundation

EIN: 86-6320000

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
INCOME FROM ANNUITIES	240,685	240,685	

TY 2015 Taxes Schedule

Name: The Surplus Line Association of Arizona
Foundation

EIN: 86-6320000

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
990-PF Estimated Tax for 2015	3,000			
990-PF Excise Tax for 2014	8			
990-PF Extension for 2014	1,948			

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2015
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Name of the organization The Surplus Line Association of Arizona Foundation	Employer identification number 86-6320000
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
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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 other 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 33¹/₃% 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 990PF, 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 The Surplus Line Association of Arizona Foundation	Employer identification number 86-6320000
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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			Person ☒
	The Surplus Line Association of Ari	\$ 729,500	Payroll ☐
	KIERLAND BUS CTR 15849 N 71ST ST		Noncash ☐
	Scottsdale, AZ 85254		(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person ☐
		\$	Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person ☐
		\$	Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person ☐
		\$	Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person ☐
		\$	Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person ☐
		\$	Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person ☐
		\$	Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)

Name of organization The Surplus Line Association of Arizona Foundation	Employer identification number 86-6320000
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Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Employer identification number
86-6320000

[illegible]