

Form **990****Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

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

Go to www.irs.gov/Form990 for instructions and the latest information.

A For the 2018 calendar year, or tax year beginning 2018, and ending 20

B Check if applicable:
☐ Address change
☒ Name change
☐ Initial return
☐ Final return/terminated return
☐ Amended return
☐ Application pending

C Name of organization SAG-AFTRA PRODUCERS INDUSTRY ADVANCEMENT AND COOPERATIVE FUND
 Doing business as _____
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite
3601 WEST OLIVE AVENUE
 City or town, state or province, country, and ZIP or foreign postal code
BURBANK, CA 91505-7830

D Employer identification number
95-4428911

E Telephone number
(818) 954-9400

F Name and address of principal officer: ODELE KOHLSTRAND
3601 WEST OLIVE AVENUE, BURBANK, CA 91505

G Gross receipts \$ 19,398,987.

H(a) Is this a group return for subordinates? ☐ Yes ☒ No
H(b) Are all subordinates included? ☐ Yes ☒ No
 If "No," attach a list (see instructions)

I Tax-exempt status: ☐ 501(c)(3) ☒ 501(c)(5) (insert no.) 4947(a)(1) or 527

J Website: N/A

K Form of organization: ☐ Corporation ☒ Trust ☐ Association ☐ Other ▶

L Year of formation: 1992 **M** State of legal domicile: CA

Part I Summary

1 Briefly describe the organization's mission or most significant activities: PROVIDES EDUCATIONAL AND INFORMATIONAL ASSISTANCE TO PERFORMERS AND PRODUCERS THAT IMPROVE AND PROMOTE THE ORGANIZATION, ADVANCEMENT AND STANDARDS OF THE ENTERTAINMENT INDUSTRY.

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

3 Number of voting members of the governing body (Part VI, line 1a) 3 18.

4 Number of independent voting members of the governing body (Part VI, line 1b) 4 18.

5 Total number of individuals employed in calendar year 2018 (Part V, line 2a) 6 1.

6 Total number of volunteers (estimate if necessary) 6 0.

7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0.

7b Net unrelated business taxable income from Form 990-T, line 35 7b 0.

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h) <u>8,649,618.</u>	<u>0.</u>	<u>0.</u>
9 Program service revenue (Part VIII, line 2g) <u>295,565.</u>	<u>8,649,618.</u>	<u>10,451,310.</u>
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) <u>0.</u>	<u>295,565.</u>	<u>874,524.</u>
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) <u>8,945,183.</u>	<u>0.</u>	<u>0.</u>
12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) <u>4,920,757.</u>	<u>8,945,183.</u>	<u>11,325,834.</u>
13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) <u>0.</u>	<u>4,920,757.</u>	<u>6,058,284.</u>
14 Benefits paid to or for members (Part IX, column (A), line 4) <u>0.</u>	<u>0.</u>	<u>0.</u>
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) <u>131,095.</u>	<u>131,095.</u>	<u>65,867.</u>
16a Professional fundraising fees (Part IX, column (A), line 11e) <u>0.</u>	<u>0.</u>	<u>0.</u>
16b Total fundraising expenses (Part IX, column (D), line 25) <u>0.</u>	<u>0.</u>	<u>0.</u>
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) <u>407,924.</u>	<u>407,924.</u>	<u>524,911.</u>
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) <u>5,459,776.</u>	<u>5,459,776.</u>	<u>6,649,062.</u>
19 Revenue less expenses. Subtract line 18 from line 12 <u>3,485,407.</u>	<u>3,485,407.</u>	<u>4,676,772.</u>
20 Total assets (Part X, line 16) <u>12,598,734.</u>	<u>12,598,734.</u>	<u>22,322,056.</u>
21 Total liabilities (Part X, line 28) <u>4,445,804.</u>	<u>4,445,804.</u>	<u>4,960,474.</u>
22 Net assets or fund balances. Subtract line 21 from line 20 <u>8,152,930.</u>	<u>8,152,930.</u>	<u>17,361,582.</u>

Part II Signature Block

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

Sign Here
 Signature of officer ODELE KOHLSTRAND Date 11/14/19
 Type or print name and title CEO

Preparer
 Print/type preparer's name RICHARD L RUVELSON Preparer's signature [Signature] Date 11/14/19
 Firm's name WITHUMSMITH+BROWN, PC Check ☐ if self-employed PTIN P00234075
 Firm's address 1600 EAST WEST HWY 900 BETHESDA, MD 20914-3423 Firm's EIN 22-2027092
 Phone no. 301-272-6000

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

Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2018)

Part III Statement of Program Service Accomplishments

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

☒ X**1** Briefly describe the organization's mission

PROVIDES EDUCATIONAL AND INFORMATIONAL ASSISTANCE TO PERFORMERS AND PRODUCERS THAT IMPROVE AND PROMOTE THE ORGANIZATION, ADVANCEMENT AND STANDARDS OF THE ENTERTAINMENT INDUSTRY.

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

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

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

If "Yes," describe these changes on Schedule O

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

AMERICAN HUMANE ASSOCIATION - SUPPORT FROM THE IACF ALLOWS THIS ORGANIZATION TO ENSURE THE SAFETY OF ANIMALS AND PERFORMERS WORKING WITH ANIMALS ON SET.

4b (Code _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

SAGINDIE - SUPPORT FROM THE IACF ALLOWS THIS ORGANIZATION TO INFORM INDEPENDENT PRODUCERS ABOUT THE BENEFITS OF BECOMING SIGNATORY PRODUCERS.

4c (Code _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

SAG-AFTRA FOUNDATION - SUPPORT FROM THE IACF ALLOWS THIS ORGANIZATION TO PROVIDE VARIOUS ASSISTANCE PROGRAMS TO SAG-AFTRA MEMBERS.

4d Other program services (Describe in Schedule O)

(Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4e Total program service expenses

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A.		X
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I.		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II.		
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III.		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I.		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II.		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III.		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV.		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V.		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.	X	
b Did the organization report an amount for investments-other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.		X
c Did the organization report an amount for investments-program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.		X
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X.	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII.	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV.		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV.		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV.		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions).		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II.		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III.		X
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H.		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II.	X	

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)		
a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	X	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

X

	Yes	No
1a Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. 2a 1		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b If "Yes," enter the name of the foreign country ► See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		
b If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		
d If "Yes," indicate the number of Forms 8282 filed during the year 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10 Section 501(c)(7) organizations. Enter		
a Initiation fees and capital contributions included on Part VIII, line 12 10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities 10b		
11 Section 501(c)(12) organizations. Enter		
a Gross income from members or shareholders 11a		
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them) 11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? 12a		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans 13b		
c Enter the amount of reserves on hand 13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?		X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? Note. See instructions and file Form 4720, Schedule N		X
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O		X

Form 990 (2018)

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions. Check if Schedule O contains a response or note to any line in this Part VI ☒ X

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year 1a 18		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O		
b Enter the number of voting members included in line 1a, above, who are independent 1b 18		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? 2	X	
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? 3		X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? 4	X	
5 Did the organization become aware during the year of a significant diversion of the organization's assets? 5		X
6 Did the organization have members or stockholders? 6		X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? 7a	X	
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? 7b		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
a The governing body? 8a	X	
b Each committee with authority to act on behalf of the governing body? 8b	X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O 9		X

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

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

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ►

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records ►
 SAG-PRODUCERS IAC FUND 3601 WEST OLIVE AVENUE BURBANK, CA 91505 (818) 976-4405

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

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

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) DAVID WEISSMAN TRUSTEE/CHAIRMAN	1.00 2.00	X		X				0.	0.	0.
(2) TED SINCLAIR TRUSTEE/VICE-CHAIR (THRU 10/18)	1.00 0.	X		X				0.	0.	0.
(3) JOHN T. MCGUIRE TRUSTEE/VICE-CHAIRMAN	1.00 2.00	X		X				0.	0.	0.
(4) AMY AQUINO TRUSTEE	1.00 2.00	X						0.	0.	0.
(5) JOHN CARTER BROWN TRUSTEE	1.00 2.00	X						0.	0.	0.
(6) L SCOTT CALDWELL TRUSTEE	1.00 0.	X						0.	0.	0.
(7) MELINDA CARRILLO TRUSTEE	1.00 0.	X						0.	0.	0.
(8) SUSAN BOYD JOYCE TRUSTEE	1.00 0.	X						0.	0.	0.
(9) JANE LEE TRUSTEE	1.00 0.	X						0.	0.	0.
(10) ROBERT LYDIARD TRUSTEE	1.00 0.	X						0.	0.	0.
(11) STACY MARCUS TRUSTEE	1.00 2.00	X						0.	0.	0.
(12) TRACY OWEN TRUSTEE	1.00 2.00	X						0.	0.	0.
(13) JOHN E RHONE TRUSTEE	1.00 1.00	X						0.	0.	0.
(14) RAY RODRIQUEZ TRUSTEE	1.00 2.00	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) MARC SANDMAN ----- TRUSTEE	1.00 2.00	X						0.	0.	0.
(16) JAMAL STORY ----- TRUSTEE	1.00 0.	X						0.	0.	0.
(17) JACOB VONK ----- TRUSTEE	1.00 0.	X						0.	0.	0.
(18) DAVID P. WHITE ----- TRUSTEE	1.00 2.00	X						0.	0.	0.
(19) DOUG WOOD ----- TRUSTEE	1.00 0.	X						0.	0.	0.
(20) ODELE KOHLSTRAND ----- CHIEF EXECUTIVE OFFICER	.19 37.18			X				0.	276,665.	49,799.
(21) MICHAEL ESTRADA ----- CHIEF EXECUTIVE OFFICER	.25 37.25					X		0.	475,386.	87,929.
(22) GOKUL SHESHADRI ----- CHIEF INFORMATION OFFICER	.25 37.25					X		0.	297,495.	58,386.
(23) GAYANE G KALPAKIAN ----- CONTROLLER	.32 37.18					X		0.	176,185.	34,050.
(24) MALLERY B LUCCHESI ----- DIRECTOR OF CONTRIBUTIONS	.44 37.06					X		0.	123,694.	27,035.
(25) BRIAN T YOSHIMURA ----- COMPLIANCE AUDIT	.50 37.00					X		0.	121,302.	29,740.
1b Sub-total								0.	0.	0.
c Total from continuation sheets to Part VII, Section A								0.	1,470,727.	286,939.
d Total (add lines 1b and 1c)								0.	1,470,727.	286,939.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0.**

3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

	Yes	No
3		X
4	X	
5		X

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

Section B. Independent Contractors

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

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

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

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c				
	d	Related organizations	1d				
	e	Government grants (contributions) . .	1e				
	f	All other contributions, gifts, grants, and similar amounts not included above .	1f				
	g	Noncash contributions included in lines 1a-1f \$					
	h	Total. Add lines 1a-1f		0			
Program Service Revenue			Business Code				
	2a	EMPLOYER CONTRIBUTIONS	900099	10,451,310	10,451,310		
	b						
	c						
	d						
	e						
	f	All other program service revenue					
	g	Total. Add lines 2a-2f		10,451,310			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts).		722,574			722,574
	4	Income from investment of tax-exempt bond proceeds .		0			
	5	Royalties		0			
			(i) Real	(ii) Personal			
	6a	Gross rents					
	b	Less rental expenses					
	c	Rental income or (loss)					
	d	Net rental income or (loss)		0			
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
			8,225,103				
	b	Less cost or other basis and sales expenses		8,073,153			
	c	Gain or (loss)		151,950			
	d	Net gain or (loss)		151,950			151,950
	8a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18	a	0			
	b	Less direct expenses	b	0			
	c	Net income or (loss) from fundraising events		0			
	9a	Gross income from gaming activities See Part IV, line 19	a	0			
	b	Less direct expenses	b	0			
	c	Net income or (loss) from gaming activities		0			
	10a	Gross sales of inventory, less returns and allowances	a	0			
b	Less cost of goods sold	b	0				
c	Net income or (loss) from sales of inventory		0				
Miscellaneous Revenue		Business Code					
11a							
b							
c							
d	All other revenue						
e	Total. Add lines 11a-11d		0				
12	Total revenue. See instructions		11,325,834	10,451,310		874,524	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21	6,058,284.			
2 Grants and other assistance to domestic individuals See Part IV, line 22	0.			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, lines 15 and 16	0.			
4 Benefits paid to or for members	0.			
5 Compensation of current officers, directors, trustees, and key employees	0.			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.			
7 Other salaries and wages	43,217.			
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	14,893.			
9 Other employee benefits	3,586.			
10 Payroll taxes	4,171.			
11 Fees for services (non-employees)				
a Management	0.			
b Legal	76,391.			
c Accounting	97,922.			
d Lobbying	0.			
e Professional fundraising services See Part IV, line 17.	0.			
f Investment management fees	17,498.			
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).	424.			
12 Advertising and promotion	0.			
13 Office expenses	19,187.			
14 Information technology	56,073.			
15 Royalties	0.			
16 Occupancy	12,714.			
17 Travel	1,859.			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0.			
19 Conferences, conventions, and meetings	0.			
20 Interest	0.			
21 Payments to affiliates	0.			
22 Depreciation, depletion, and amortization	21,834.			
23 Insurance	44,426.			
24 Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a ADMIN SALARIES & BENEFITS	159,593.			
b P&H CONTRIBUTIONS	15,298.			
c TAXES AND LICENSES	1,183.			
d DUES AND SUBSCRIPTIONS	509.			
e All other expenses				
25 Total functional expenses Add lines 1 through 24e	6,649,062.			
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720)	0.			

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1. Cash - non-interest-bearing	1,884,459.	1	2,526,219.
	2. Savings and temporary cash investments	16,685.	2	11,554.
	3. Pledges and grants receivable, net	0.	3	0.
	4. Accounts receivable, net	581,843.	4	586,743.
	5. Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L	0.	5	0.
	6. Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L	0.	6	0.
	7. Notes and loans receivable, net	0.	7	0.
	8. Inventories for sale or use	0.	8	0.
	9. Prepaid expenses and deferred charges	24,848.	9	19,699.
	10a. Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a 398,639.		
	b. Less accumulated depreciation	10b 306,207.	10c	92,432.
	11. Investments - publicly traded securities	9,789,365.	11	18,823,927.
	12. Investments - other securities See Part IV, line 11	0.	12	0.
	13. Investments - program-related See Part IV, line 11	0.	13	0.
	14. Intangible assets	0.	14	0.
	15. Other assets See Part IV, line 11	216,932.	15	261,482.
16. Total assets. Add lines 1 through 15 (must equal line 34)	12,598,734.	16	22,322,056.	
Liabilities	17. Accounts payable and accrued expenses	117,128.	17	50,553.
	18. Grants payable	4,186,497.	18	4,546,365.
	19. Deferred revenue	1,439.	19	68.
	20. Tax-exempt bond liabilities	0.	20	0.
	21. Escrow or custodial account liability Complete Part IV of Schedule D	0.	21	0.
	22. Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L	0.	22	0.
	23. Secured mortgages and notes payable to unrelated third parties	0.	23	0.
	24. Unsecured notes and loans payable to unrelated third parties	0.	24	0.
	25. Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D	140,740.	25	363,488.
	26. Total liabilities. Add lines 17 through 25.	4,445,804.	26	4,960,474.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here ☒ and complete lines 27 through 29, and lines 33 and 34.			
	27. Unrestricted net assets	8,152,930.	27	17,361,582.
	28. Temporarily restricted net assets	0.	28	0.
	29. Permanently restricted net assets	0.	29	0.
	Organizations that do not follow SFAS 117 (ASC 958), check here ☐ and complete lines 30 through 34.			
	30. Capital stock or trust principal, or current funds		30	
	31. Paid-in or capital surplus, or land, building, or equipment fund		31	
	32. Retained earnings, endowment, accumulated income, or other funds		32	
	33. Total net assets or fund balances	8,152,930.	33	17,361,582.
	34. Total liabilities and net assets/fund balances.	12,598,734.	34	22,322,056.

Form **990** (2018)

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI. ☒ X

1	Total revenue (must equal Part VIII, column (A), line 12)	1	11,325,834.
2	Total expenses (must equal Part IX, column (A), line 25)	2	6,649,062.
3	Revenue less expenses Subtract line 2 from line 1	3	4,676,772.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	8,152,930.
5	Net unrealized gains (losses) on investments	5	-1,654,700.
6	Donated services and use of facilities	6	0.
7	Investment expenses	7	0.
8	Prior period adjustments	8	0.
9	Other changes in net assets or fund balances (explain in Schedule O)	9	6,186,580.
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	17,361,582.

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☒ X

- 1 Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other _____
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant?
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both
☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- b Were the organization's financial statements audited by an independent accountant?
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both
☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

Form **990** (2018)

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization SAG-AFTRA PRODUCERS INDUSTRY

ADVANCEMENT AND COOPERATIVE FUND

Supplemental Financial Statements

▶ Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information

OMB No 1545-0047

2018

Open to Public
Inspection

Employer identification number

95-4428911

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year) . .		
4 Aggregate value at end of year.		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		☐ Yes ☐ No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		☐ Yes ☐ No

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e.g., recreation or education)	☐ Preservation of a historically important land area
☐ Protection of natural habitat	☐ Preservation of a certified historic structure
☐ Preservation of open space	

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

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register.	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

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

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

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

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

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

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8

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

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

(i) Revenue included on Form 990, Part VIII, line 1. ▶ \$ _____

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

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

a Revenue included on Form 990, Part VIII, line 1. ▶ \$ _____

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

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

Schedule D (Form 990) 2018

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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)
- a ☐ Public exhibition d ☐ Loan or exchange programs
- b ☐ Scholarly research e ☐ Other _____
- c ☐ Preservation for future generations
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No
- b If "Yes," explain the arrangement in Part XIII and complete the following table
- | | Amount |
|---|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10

- | | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance | | | | | |
| b Contributions | | | | | |
| c Net investment earnings, gains, and losses | | | | | |
| d Grants or scholarships | | | | | |
| e Other expenditures for facilities and programs | | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | | | | | |
- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as
- a Board designated or quasi-endowment ▶ _____ %
- b Permanent endowment ▶ _____ %
- c Temporarily restricted endowment ▶ _____ %
- The percentages on lines 2a, 2b, and 2c should equal 100%
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by
- | | Yes | No |
|--|--------|----|
| (i) unrelated organizations | 3a(i) | |
| (ii) related organizations | 3a(ii) | |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b | |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		43,691.	38,635.	5,056.
d Equipment		290,212.	240,655.	49,557.
e Other		64,736.	26,917.	37,819.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c).				92,432.

Schedule D (Form 990) 2018

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b See Form 990, Part X, line 12

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A) _____		
(B) _____		
(C) _____		
(D) _____		
(E) _____		
(F) _____		
(G) _____		
(H) _____		
Total (Column (b) must equal Form 990, Part X, col (B) line 12) ►		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c See Form 990, Part X, line 13

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) _____		
(2) _____		
(3) _____		
(4) _____		
(5) _____		
(6) _____		
(7) _____		
(8) _____		
(9) _____		
Total (Column (b) must equal Form 990, Part X, col (B) line 13) ►		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1) _____	
(2) _____	
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
Total (Column (b) must equal Form 990, Part X, col (B) line 15) ►	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f See Form 990, Part X, line 25

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) DUE TO SAG-PRODUCERS PENSION PLAN	363,488.
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
Total (Column (b) must equal Form 990, Part X, col (B) line 25) ►	

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

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

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a

1	Total revenue, gains, and other support per audited financial statements		1	9,666,694.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12			
a	Net unrealized gains (losses) on investments	2a	-1,654,700.	
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII)	2d	13,058.	
e	Add lines 2a through 2d	2e		-1,641,642.
3	Subtract line 2e from line 1	3		11,308,336.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	17,498.	
b	Other (Describe in Part XIII)	4b		
c	Add lines 4a and 4b	4c		17,498.
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12)	5		11,325,834.

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

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a

1	Total expenses and losses per audited financial statements		1	6,644,622.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII)	2d	13,058.	
e	Add lines 2a through 2d	2e		13,058.
3	Subtract line 2e from line 1	3		6,631,564.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	17,498.	
b	Other (Describe in Part XIII)	4b		
c	Add lines 4a and 4b	4c		17,498.
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18)	5		6,649,062.

Part XIII Supplemental Information.

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

SEE PAGE 5

Part XIII Supplemental Information (continued)

PART X, LINE 2 - FIN 48 FOOTNOTE:

ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA REQUIRE MANAGEMENT TO EVALUATE TAX POSITIONS TAKEN BY THE FUND AND RECOGNIZE A TAX LIABILITY IF THE FUND HAS TAKEN AN UNCERTAIN POSITION THAT MORE LIKELY THAN NOT WOULD NOT BE SUSTAINED UPON EXAMINATION BY THE IRS. MANAGEMENT HAS EVALUATED THE TAX POSITIONS TAKEN BY THE FUND AND CONCLUDED THAT AS OF DECEMBER 31, 2018 THERE ARE NO UNCERTAIN POSITIONS TAKEN OR EXPECTED TO BE TAKEN THAT WOULD REQUIRE RECOGNITION IN THE FINANCIAL STATEMENTS. THE FUND IS SUBJECT TO ROUTINE AUDITS BY TAXING JURISDICTIONS; HOWEVER, THERE ARE CURRENTLY NO AUDITS IN PROGRESS. IN ADDITION, THERE HAVE BEEN NO TAX RELATED INTEREST OR PENALTIES FOR THE PERIOD PRESENTED IN THESE FINANCIAL STATEMENTS.

SCHEDULE I
(Form 990)

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

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

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization **SAG-AFTRA PRODUCERS INDUSTRY
ADVANCEMENT AND COOPERATIVE FUND**

Employer identification number

95-4428911

2018

**Open to Public
Inspection**

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) ACTORS FUND OF AMERICA 729 7TH AVE., 10TH FL NEW YORK, NY 10019	13-1635251	501 (C) (3)	640,944				GENERAL SUPPORT
(2) AMERICAN HUMANE ASSOCIATION 1400 16TH ST, NW WASHINGTON, DC 20036	84-0432950	501 (C) (3)	2,544,983				GENERAL SUPPORT
(3) CAREER TRANSITION FOR DANCERS INC 729 SEVENTH AVE, 10TH FL NEW YORK, NY 10019	13-3488203	501 (C) (3)	110,000				GENERAL SUPPORT
(4) CONTRACT SERVICES ADMIN TRAINING TRUST 2710 WINONA AVENUE BURGANK, CA 91504	27-2251583	501 (C) (3)	256,115				GENERAL SUPPORT
(5) MOTION PICTURE AND TELEVISION FUND 23388 MULLHOLAND WOODLAND HILLS, CA 91364	95-4597683	501 (C) (3)	275,000				GENERAL SUPPORT
(6) SAG-AFTRA FOUNDATION 5757 WILSHIRE BLVD LOS ANGELES, CA 90012	95-3967876	501 (C) (3)	705,000				GENERAL SUPPORT
(7) SAGINDIE 5757 WILSHIRE BLVD LOS ANGELES, CA 90036	82-0584272	501 (C) (3)	1,098,564				GENERAL SUPPORT
(8) VISUAL COMMUNICATIONS MEDIA 120 JUDGE JOHN AISO LOS ANGELES, CA 90012	23-7108393	501 (C) (3)	25,000				GENERAL SUPPORT
(9) SAG-AFTRA 5757 WILSHIRE BLVD LOS ANGELES, CA 90036	95-1202270	501 (C) (5)	232,278				CONTRACT PRINTING & COMMERCIAL STUDIES
(10) NALIP 3415 S SEPULVEDA LOS ANGELES, CA 90034	13-4198479	501 (C) (3)	90,000				GENERAL SUPPORT
(11) KAUFHER MEMBERS RESOURCE CENTER ONE EAST ERIE STREET CHICAGO, IL 60611	26-2543850	501 (C) (3)	80,400				GENERAL SUPPORT
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **10.**

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

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

Schedule I (Form 990) (2018)

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

	(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1						
2						
3						
4						
5						
6						
7						

Part IV Supplemental Information. Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

PART I, LINE 2 - PROCEDURES FOR MONITORING THE USE OF GRANT FUNDS:

ALL GRANTEES ARE REQUIRED, VIA A SIGNED AWARD AGREEMENT, TO PROVIDE MONTHLY OR QUARTERLY BUDGET VS. ACTUAL AND PROGRESS REPORTS TO THE IACF. FUNDS CAN ONLY BE USED FOR THE ACTIVITIES OUTLINED IN THE GRANT APPLICATION. ANY UNUSED FUNDS MUST BE REFUNDED TO THE IACF. ALL GRANTEES ARE ELIGIBLE TO BE AUDITED BY AN OUTSIDE CONSULTING FIRM ON AN ANNUAL BASIS, AS DETERMINED BY IACF MANAGEMENT.

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization **SAG-AFTRA PRODUCERS INDUSTRY
ADVANCEMENT AND COOPERATIVE FUND**

Compensation Information

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

- ▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**
▶ **Attach to Form 990.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information**

OMB No 1545-0047

2018

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Inspection**

Employer identification number
95-4428911

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| ☒ First-class or charter travel | ☐ Housing allowance or residence for personal use |
| ☐ Travel for companions | ☐ Payments for business use of personal residence |
| ☐ Tax indemnification and gross-up payments | ☐ Health or social club dues or initiation fees |
| ☐ Discretionary spending account | ☐ Personal services (such as maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|--|--|
| ☐ Compensation committee | ☐ Written employment contract |
| ☐ Independent compensation consultant | ☐ Compensation survey or study |
| ☐ Form 990 of other organizations | ☐ Approval by the board or compensation committee |

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
- c** Participate in, or receive payment from, an equity-based compensation arrangement?
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
- b** Any related organization?
- If "Yes" on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
- b** Any related organization?
- If "Yes" on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III.

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

1b X

2 X

4a X

4b X

4c X

5a

5b

6a

6b

7

8

9

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

Schedule J (Form 990) 2018

Schedule J (Form 990) 2018

Page 2

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 ODELE KOHLSTRAND CHIEF EXECUTIVE OFFICER	(i) 0. (ii) 270,432.	0.	0. 6,233.	0. 29,575.	0. 20,224.	0. 326,464.	0. 0.
2 MICHAEL ESTRADA CHIEF EXECUTIVE OFFICER	(i) 0. (ii) 465,878.	0.	0. 9,508.	0. 40,937.	0. 46,992.	0. 563,315.	0. 0.
3 GOKUL SHESHADRI CHIEF INFORMATION OFFICER	(i) 0. (ii) 291,021.	0.	0. 6,474.	0. 32,240.	0. 26,146.	0. 355,881.	0. 0.
4 GAYANE G KALPAKIAN CONTROLLER	(i) 0. (ii) 172,167.	0.	0. 4,018.	0. 19,046.	0. 15,004.	0. 210,235.	0. 0.
5 MALLERY B LUCCHESI DIRECTOR OF CONTRIBUTIONS	(i) 0. (ii) 120,829.	0.	0. 2,865.	0. 13,655.	0. 13,380.	0. 150,729.	0. 0.
6 BRIAN T YOSHIMURA COMPLIANCE AUDIT	(i) 0. (ii) 118,437.	0.	0. 2,865.	0. 13,683.	0. 16,057.	0. 151,042.	0. 0.
7	(i) (ii)						
8	(i) (ii)						
9	(i) (ii)						
10	(i) (ii)						
11	(i) (ii)						
12	(i) (ii)						
13	(i) (ii)						
14	(i) (ii)						
15	(i) (ii)						
16	(i) (ii)						

Schedule J (Form 990) 2018

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Part III Supplemental Information

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

PART I, LINE 1A - FIRST-CLASS TRAVEL POLICY:

TOTAL SCHEDULED FLIGHT TIME FROM ORIGIN TO FINAL DESTINATION IS AT LEAST

FOUR HOURS. TOTAL FLIGHT TIME IS BASED ON THE MOST DIRECT ROUTE AND

FEWEST STOPS FROM THE TRUSTEE'S POINT OF ORIGIN TO FINAL DESTINATION.

IT'S NOTED THAT VARIOUS TRUSTEES AT TIMES TRAVELED VIA FIRST CLASS AND

NONE OF THE TRAVEL WAS REPORTED AS COMPENSATION TO THE TRUSTEES.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or 990-EZ.

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

OMB No 1545-0047

2018

**Open to Public
Inspection**

Name of the organization SAG-AFTRA PRODUCERS INDUSTRY
ADVANCEMENT AND COOPERATIVE FUND

Employer identification number
95-4428911

PART III - OTHER PROGRAM SERVICES:

IN ADDITION TO THE PROGRAM SERVICES IDENTIFIED IN PART III, THE IACF
SUPPORTS OTHER ORGANIZATIONS IN THEIR QUEST TO PROVIDE THE RESOURCES TO
TRAIN AND ASSIST PERFORMERS AND PRODUCERS WHICH INCLUDED:

1. CAREER TRANSITION.
2. PROVIDE PLANNING AND OPPORTUNITIES TO YOUNG PERFORMERS.
3. PROVIDE SUPPORT FOR INTERVENTION, COUNSELING AND OTHER SOCIAL SERVICES
TO SAG-AFTRA MEMBERS.
4. SUPPORT PROGRAMS THAT ENCOURAGES THE PARTICIPATION OF MINORITY
PERFORMERS AND PRODUCERS.

PART V, LINES 2A AND 2B - FILING OF FEDERAL EMPLOYMENT TAX RETURNS:

THE INDUSTRY FUND IS RELATED TO A GROUP OF JOINTLY ADMINISTERED
NOT-FOR-PROFIT ORGANIZATIONS. SINCE THE ORGANIZATION'S CO-EXIST AT THE
SAME PREMISES, THEY UTILIZE EACH OTHER'S RESOURCES, EQUIPMENT, AND
PERSONNEL. SALARIES AND CERTAIN ADMINISTRATIVE EXPENSES ARE PAID BY A
RELATED ORGANIZATION BASED ON PREDETERMINED PERCENTAGES. THE INDUSTRY
FUND HAS A SMALL GROUP OF PERSONNEL THAT IT COMPENSATES DIRECTLY AND
FILES FEDERAL EMPLOYMENT TAX RETURNS ADDITIONALLY.

PART VI, SECTION A, LINE 2 - BUSINESS RELATIONSHIP:

TRUSTEES AMY AQUINO, L. SCOTT CALDWELL, JOHN CARTER BROWN, DAVID WHITE,
JOHN T. MCGUIRE AND RAY RODRIGUEZ SERVE IN THE CAPACITY AS A DIRECTOR,
OFFICER, OR EMPLOYEE OF THE SCREEN ACTORS GUILD-AMERICAN FEDERATION OF

Name of the organization	SAG-AFTRA PRODUCERS INDUSTRY ADVANCEMENT AND COOPERATIVE FUND	Employer identification number	95-4428911
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TELEVISION AND RADIO ARTISTS.

PART VI, SECTION A, LINE 4 - CHANGES TO GOVERNING DOCUMENTS:

EFFECTIVE SEPTEMBER 30, 2018, THE AFTRA INDUSTRY COOPERATIVE FUND AND THE
SAG-AFTRA - PRODUCERS INDUSTRY ADVANCEMENT AND COOPERATIVE FUND MERGED.
THE FUND, THE SURVIVING ENTITY, HAS BEEN RE-NAMED TO THE "SAG-AFTRA
PRODUCERS INDUSTRY ADVANCEMENT AND COOPERATIVE FUND".

DUE TO THE MERGER, THE NUMBER OF TRUSTEES INCREASED FROM "14" TO "18".

PART VI, SECTION A, LINE 7A - ELECTION OR APPOINTMENT OF GOVERNING BODY:

THE OPERATION AND ADMINISTRATION OF THE IACF SHALL BE THE JOINT
RESPONSIBILITY OF EIGHTEEN (18) TRUSTEES, WHO SHALL CONSTITUTE THE BOARD
OF TRUSTEES. OF THESE, NINE (9) SHALL BE PRODUCER TRUSTEES, FIVE (5) TO
BE APPOINTED BY THE ALLIANCE OF MOTION PICTURE AND TELEVISION PRODUCERS,
INC ("AMPTP") AND FOUR (4) TO BE APPOINTED BY THE ANA-AAAA JOINT POLICY
COMMITTEE ON BROADCASTING TALENT UNION RELATIONS ("AAAA"); AND NINE (9)
SHALL BE SAG-AFTRA TRUSTEES, TO BE APPOINTED BY SAG-AFTRA. EITHER
SAG-AFTRA OR THE AMPTP OR THE AAAA MAY AT ANY TIME IN ITS DISCRETION, BY
WRITTEN NOTICE GIVEN TO THE IACF, APPOINT A SUCCESSOR OR SUCCESSORS FOR
ANY ONE OR MORE OF THE TRUSTEES THERETOFORE APPOINTED BY IT.

PART VI, SECTION B, LINE 11B - REVIEW PROCESS OF FORM 990:

THE FORM 990 IS PREPARED BY AN INDEPENDENT CERTIFIED PUBLIC ACCOUNTING

Name of the organization	SAG-AFTRA PRODUCERS INDUSTRY ADVANCEMENT AND COOPERATIVE FUND	Employer identification number	95-4428911
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FIRM, ENGAGED BY THE BOARD OF TRUSTEES, AND A DRAFT COPY OF THE FORM 990 IS PROVIDED FOR REVIEW BY THE CFO AND CONTROLLER OF THE SAG-PRODUCERS FUNDS; PRIOR TO FILING OF THE FORM 990 WITH THE INTERNAL REVENUE SERVICE.

PART VI, SECTION C, LINE 19 - AVAILABILITY OF DOCUMENTS, POLICIES AND F/S: THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, POLICIES AND FINANCIAL STATEMENTS AVAILABLE TO ALL PARTICIPANTS, IN ITS BENEFIT PLAN UPON REQUEST. THE GENERAL PUBLIC HAS ACCESS TO MANY OF ITS DOCUMENTS THROUGH GOVERNMENT FILING MADE BY THE ORGANIZATION.

PART XI, LINE 9 - OTHER CHANGES IN NET ASSETS:
NET ASSETS TRANSFERRED FROM AFTRA INDUSTRY COOPERATIVE FUND TO THE FUND AS A RESULT OF THE MERGER WERE \$6,186,580.

PART XII, LINE 2C - RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT:
THE ORGANIZATION HAS A SEPARATE AUDIT COMMITTEE COMPRISED OF TWO MEMBERS OF THE BOARD OF TRUSTEES. THE COMMITTEE HAS THE RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT AND THE SELECTION OF INDEPENDENT ACCOUNTANTS.

SCHEDULE R
(Form 990)Department of the Treasury
Internal Revenue Service**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

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Name of the organization

SAG-AFTRA PRODUCERS INDUSTRY

ADVANCEMENT AND COOPERATIVE FUND

Employer identification number

95-4428911

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

	(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1)						
(2)						
(3)						
(4)						
(5)						
(6)						

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

	(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?
							Yes No
(1)	SAG-AFTRA HEALTH FUND 3601 WEST OLIVE AVENUE BURBANK, CA 91505 95-6024160	HLTH BENEFITS	CA	501 (C) (9)		N/A	X
(2)	BUSINESS ARTS PLAZA, INC 3601 WEST OLIVE AVENUE BURBANK, CA 91505 95-4486564	RE TITLE HLDG	CA	501 (C) (2)		SAG-P PEN FD	X
(3)							
(4)							
(5)							
(6)							
(7)							

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

Schedule R (Form 990) 2018

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512 - 514)	(f) Share of total income	(g) Share of end-of- year assets	(h) Disproportionate allocations?		(i) Code V - UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?	(k) Percentage ownership
							Yes	No			
(1)											
(2)											
(3)											
(4)											
(5)											
(6)											
(7)											

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1)									
(2)									
(3)									
(4)									
(5)									
(6)									
(7)									

Schedule R (Form 990) 2018

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

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	☐	☒
b Gift, grant, or capital contribution to related organization(s)	☐	☒
c Gift, grant, or capital contribution from related organization(s)	☐	☒
d Loans or loan guarantees to or for related organization(s)	☐	☒
e Loans or loan guarantees by related organization(s)	☐	☒
f Dividends from related organization(s)	☐	☒
g Sale of assets to related organization(s)	☐	☒
h Purchase of assets from related organization(s)	☐	☒
i Exchange of assets with related organization(s)	☐	☒
j Lease of facilities, equipment, or other assets to related organization(s)	☐	☒
k Lease of facilities, equipment, or other assets from related organization(s)	☐	☒
l Performance of services or membership or fundraising solicitations for related organization(s)	☐	☒
m Performance of services or membership or fundraising solicitations by related organization(s)	☐	☒
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	☐	☒
o Sharing of paid employees with related organization(s)	☐	☒
p Reimbursement paid to related organization(s) for expenses	☐	☒
q Reimbursement paid by related organization(s) for expenses	☐	☒
r Other transfer of cash or property to related organization(s)	☐	☒
s Other transfer of cash or property from related organization(s)	☐	☒

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

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				

Part VI **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V - UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1)													
(2)													
(3)													
(4)													
(5)													
(6)													
(7)													
(8)													
(9)													
(10)													
(11)													
(12)													
(13)													
(14)													
(15)													
(16)													

Part VII **Supplemental Information**
Provide additional information for responses to questions on Schedule R See instructions