**Part A: Description of Financial Statements**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is the organizational description in sections 11(a)(2) and 11(a)(3) less than 2 pages in length?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. In the organizational description (section 11(a)(2) and 11(a)(3)) does the organization describe all of its activities in general terms?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Part B: Description of Financial Statements (cont.)**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Part C: Description of Financial Statements (cont.)**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>21. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30. Does the organizational description include a preliminary description of the organization (section 11(a)(3))?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Form 990 - Statements Regarding Other IRS Filings and Tax Compliance

<table>
<thead>
<tr>
<th>Part V</th>
<th>Statement Regarding Other IRS Filings and Tax Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Enter the name(s) of any individuals who are key persons in the organization.</td>
</tr>
<tr>
<td></td>
<td>If there are 10 or more individuals, provide a list.</td>
</tr>
<tr>
<td></td>
<td>If there are fewer than 10 individuals, provide names and titles.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for making decisions about the organization.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for day-to-day operations.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for financial management.</td>
</tr>
<tr>
<td>11.</td>
<td>Enter the name(s) of any individuals who are key persons in the organization.</td>
</tr>
<tr>
<td></td>
<td>If there are 10 or more individuals, provide a list.</td>
</tr>
<tr>
<td></td>
<td>If there are fewer than 10 individuals, provide names and titles.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for making decisions about the organization.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for day-to-day operations.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for financial management.</td>
</tr>
<tr>
<td>12.</td>
<td>Enter the name(s) of any individuals who are key persons in the organization.</td>
</tr>
<tr>
<td></td>
<td>If there are 10 or more individuals, provide a list.</td>
</tr>
<tr>
<td></td>
<td>If there are fewer than 10 individuals, provide names and titles.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for making decisions about the organization.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for day-to-day operations.</td>
</tr>
<tr>
<td></td>
<td>- The individual(s) is/are responsible for financial management.</td>
</tr>
</tbody>
</table>

### Legal Compliance

- **Part VI**: Additional Information
- **Part VII**: Schedule of Expenses
- **Part VIII**: Schedule of Donors
- **Part IX**: Schedule of Contributions
- **Part X**: Schedule of Grants
- **Part XI**: Schedule of Investments
- **Part XII**: Schedule of Loans
- **Part XIII**: Other Information

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**Note**: The above text is a representation of the form and does not include all details and fields as seen in the actual form. For a complete understanding, please refer to the official IRS publication or online resource.
### Part D: Governance, Management, and Risks

#### Section A: Governing Body and Management

- [ ] a. Enter the name of the governing body at the end of the line.
- [ ] b. Enter the number of meetings held of the governing body during the past year.
- [ ] c. Enter the number of meetings held of the governing body at the end of the line.
- [ ] d. Enter the number of directors, officers, and key employees with a current business relationship to a significant business relationship with any other officer, director, trustee, or key employee.
- [ ] e. Did the organization make any significant management changes during the year? Yes/No
- [ ] f. Did the organization make any significant management changes during the year? Yes/No
- [ ] g. Enter the date of the last significant management change.
- [ ] h. Enter the date of the last significant management change.
- [ ] i. Describe any significant management changes.
- [ ] j. Enter the date of the last significant management change.
- [ ] k. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] l. Enter the date of the last significant management change.
- [ ] m. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] n. Enter the date of the last significant management change.

#### Section B: Policies

- [ ] a. Did the organization have a written policy that addresses the responsibilities, authority, and accountability of the governing body? Yes/No
- [ ] b. Enter the date of the last significant management change.
- [ ] c. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] d. Enter the date of the last significant management change.
- [ ] e. Enter the date of the last significant management change.
- [ ] f. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] g. Enter the date of the last significant management change.
- [ ] h. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] i. Enter the date of the last significant management change.

#### Section C: Disclosure

- [ ] a. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] b. Enter the date of the last significant management change.
- [ ] c. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] d. Enter the date of the last significant management change.
- [ ] e. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] f. Enter the date of the last significant management change.
- [ ] g. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] h. Enter the date of the last significant management change.
- [ ] i. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] j. Enter the date of the last significant management change.

#### Section D: Financial Information

- [ ] a. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] b. Enter the date of the last significant management change.
- [ ] c. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] d. Enter the date of the last significant management change.
- [ ] e. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] f. Enter the date of the last significant management change.
- [ ] g. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] h. Enter the date of the last significant management change.
- [ ] i. Did the organization have a written plan that specifies the powers and duties of the governing body? Yes/No
- [ ] j. Enter the date of the last significant management change.
Section 9. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.

For purposes of this section, the term "officer" means any person who either directly or indirectly participates in decision-making for the organization or who has authority to commit the organization in any manner.

The following officers and directors of the organization are included in this section:

<table>
<thead>
<tr>
<th>Name and Title</th>
<th>Date of Birth</th>
<th>Age</th>
<th>Total Compensation Received</th>
<th>Date of Compensation Received</th>
<th>Date of Last Compensation Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>12/31/1960</td>
<td>60</td>
<td>$200,000</td>
<td>1/1/2021</td>
<td>1/1/2020</td>
</tr>
<tr>
<td>Jane Doe</td>
<td>01/01/1970</td>
<td>50</td>
<td>$150,000</td>
<td>4/1/2020</td>
<td>4/1/2019</td>
</tr>
</tbody>
</table>

The organization reports the compensation received by its officers and directors for the year 2021.

(continued)
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>John Smith</td>
<td>01/01/2019</td>
<td>$120,000</td>
<td>$110,000</td>
<td>$100,000</td>
<td>$90,000</td>
<td>$80,000</td>
<td>$70,000</td>
<td>$60,000</td>
<td>$50,000</td>
<td>$40,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>2</td>
<td>Jane Doe</td>
<td>02/01/2019</td>
<td>$130,000</td>
<td>$120,000</td>
<td>$110,000</td>
<td>$100,000</td>
<td>$90,000</td>
<td>$80,000</td>
<td>$70,000</td>
<td>$60,000</td>
<td>$50,000</td>
<td>$40,000</td>
</tr>
</tbody>
</table>

Section B: Executive Officers

Complete this section for the executive officers of the organization. Provide the description of services and the compensation for each officer.

<table>
<thead>
<tr>
<th></th>
<th>Name of Officer/Employee</th>
<th>Description of Services</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>John Smith</td>
<td>CEO</td>
<td>$120,000</td>
</tr>
<tr>
<td>2</td>
<td>Jane Doe</td>
<td>CFO</td>
<td>$130,000</td>
</tr>
</tbody>
</table>

Section C: Independent Directors

Complete this section for the independent directors of the organization. Provide the description of services and the compensation for each director.

<table>
<thead>
<tr>
<th></th>
<th>Name of Director</th>
<th>Description of Services</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dr. Robert</td>
<td>Board Member</td>
<td>$10,000</td>
</tr>
<tr>
<td>2</td>
<td>Dr. Sarah</td>
<td>Board Member</td>
<td>$11,000</td>
</tr>
</tbody>
</table>

Section D: Total Compensation

Complete this section to show the total compensation for the officers and directors.

<table>
<thead>
<tr>
<th></th>
<th>Total Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$550,000</td>
</tr>
<tr>
<td>2</td>
<td>$540,000</td>
</tr>
</tbody>
</table>

Note: The compensation amounts are for illustration purposes only and should be replaced with actual compensation amounts.
**Form 1040z - Reporting Multiple Tax Years**

**Part 1 - Calculation of Taxable Income**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Years</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Business income</td>
<td>2022</td>
<td>$100,000</td>
</tr>
<tr>
<td>1b</td>
<td>Interest income</td>
<td>2021</td>
<td>$5,000</td>
</tr>
<tr>
<td>1c</td>
<td>Dividends</td>
<td>2023</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

**Part 2 - Calculation of Tax Liability**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Years</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a</td>
<td>Federal income tax due</td>
<td>2022</td>
<td>$50,000</td>
</tr>
<tr>
<td>2b</td>
<td>State income tax due</td>
<td>2021</td>
<td>$2,500</td>
</tr>
<tr>
<td>2c</td>
<td>Foreign tax credits</td>
<td>2023</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

**Part 3 - Calculation of Tax Refund or Overpayment**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Years</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3a</td>
<td>Tax refund claimed</td>
<td>2022</td>
<td>$15,000</td>
</tr>
<tr>
<td>3b</td>
<td>Overpayment of estimated tax</td>
<td>2021</td>
<td>$1,500</td>
</tr>
</tbody>
</table>

**Part 4 - Notes and Adjustments**

- Adjusted gross income: $117,000
- Standard deduction: $10,000
- Itemized deductions: $15,000

**Part 5 - Other Information**

- Self-employment income: $25,000
- Self-employment tax due: $2,500

**Part 6 - Certification**

Signed: [Signature]

Date: [Date]
**PART B: Statement of Functional Expenses**

Number in Part A transfer to this section. If nonprofit organization does not separate expenses into categories shown in Part A, show separately.

<table>
<thead>
<tr>
<th>Functional Expense Category</th>
<th>Program Service Expenses</th>
<th>Management and General Expenses</th>
<th>Total Expenses</th>
<th>Grants and Contracts Income and Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative fees, dues, assessments, contributions, membership fees</td>
<td>$1,450,000</td>
<td>$1,450,000</td>
<td>$1,450,000</td>
<td>$1,450,000</td>
</tr>
<tr>
<td>Compensation of officers, directors, trustees, and other governing board members</td>
<td>$300,000</td>
<td>$300,000</td>
<td>$300,000</td>
<td>$300,000</td>
</tr>
<tr>
<td>Consulting fees, professional services, and similar expenses</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
</tr>
<tr>
<td>Other salaries and wages</td>
<td>$1,600,000</td>
<td>$1,600,000</td>
<td>$1,600,000</td>
<td>$1,600,000</td>
</tr>
<tr>
<td>Travel expenses and other transportation costs</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
</tr>
<tr>
<td>Other expenses</td>
<td>$300,000</td>
<td>$300,000</td>
<td>$300,000</td>
<td>$300,000</td>
</tr>
<tr>
<td>Total expenses</td>
<td>$6,000,000</td>
<td>$6,000,000</td>
<td>$6,000,000</td>
<td>$6,000,000</td>
</tr>
<tr>
<td>Grants and Contracts Income and Expenses</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
</tr>
</tbody>
</table>

**Note:** The above table represents a summary of the financial information provided in the document. Each category is further detailed in the original document.


<table>
<thead>
<tr>
<th>Item</th>
<th>10</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>6,690,000</td>
<td>6,690,000</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>4,840,000</td>
<td>4,840,000</td>
</tr>
<tr>
<td>Inventories</td>
<td>3,500,000</td>
<td>3,500,000</td>
</tr>
<tr>
<td>Other current assets</td>
<td>1,200,000</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Total current assets</td>
<td>16,230,000</td>
<td>16,230,000</td>
</tr>
<tr>
<td>Property, plant, and equipment</td>
<td>10,800,000</td>
<td>10,800,000</td>
</tr>
<tr>
<td>Investments in companies</td>
<td>9,000,000</td>
<td>9,000,000</td>
</tr>
<tr>
<td>Intangible assets</td>
<td>5,600,000</td>
<td>5,600,000</td>
</tr>
<tr>
<td>Goodwill</td>
<td>4,000,000</td>
<td>4,000,000</td>
</tr>
<tr>
<td>Total assets</td>
<td>49,430,000</td>
<td>49,430,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>12</th>
<th>13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable</td>
<td>2,000,000</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Notes payable</td>
<td>1,500,000</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Deferred taxes</td>
<td>500,000</td>
<td>500,000</td>
</tr>
<tr>
<td>Total liabilities</td>
<td>3,500,000</td>
<td>3,500,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>14</th>
<th>15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total liabilities</td>
<td>3,500,000</td>
<td>3,500,000</td>
</tr>
<tr>
<td>Stockholders' equity</td>
<td>45,930,000</td>
<td>45,930,000</td>
</tr>
<tr>
<td>Total liabilities and stockholders' equity</td>
<td>49,430,000</td>
<td>49,430,000</td>
</tr>
</tbody>
</table>
**Part X: Financial Statements and Reporting**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Accounting system used to prepare the Form 990?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(List the accounting system used to prepare the Form 990, if any, and the name of the organization responsible for preparing the Form 990)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Have any transactions or accruals for the fiscal year ended that are not included in the financial statements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(List the nature of the transactions or accruals and the amounts involved)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Are any gains or losses from investments included in the financial statements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(List the nature of the gains or losses and the amounts involved)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Are any transactions or accruals for the fiscal year ended that are not included in the financial statements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(List the nature of the transactions or accruals and the amounts involved)</td>
<td></td>
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</tr>
<tr>
<td>5. Did the organization report any transactions or accruals for the fiscal year ended that are not included in the financial statements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(List the nature of the transactions or accruals and the amounts involved)</td>
<td></td>
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<td>6. Did the organization report any transactions or accruals for the fiscal year ended that are not included in the financial statements?</td>
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<tr>
<td>(List the nature of the transactions or accruals and the amounts involved)</td>
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<td>7. Did the organization report any transactions or accruals for the fiscal year ended that are not included in the financial statements?</td>
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<td>(List the nature of the transactions or accruals and the amounts involved)</td>
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<td>8. Did the organization report any transactions or accruals for the fiscal year ended that are not included in the financial statements?</td>
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<td>(List the nature of the transactions or accruals and the amounts involved)</td>
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</table>
### Section A: Public Support

#### Schedule C: Public Support

<table>
<thead>
<tr>
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<tbody>
<tr>
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<td>2</td>
<td>Gifts from businesses</td>
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<td>3</td>
<td>Gifts from foundations</td>
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<tr>
<td>4</td>
<td>Gifts from government</td>
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<tr>
<td>5</td>
<td>Other gifts</td>
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<tr>
<td>B.</td>
<td>Total public support</td>
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### Section B: Total Support

#### Schedule D: Total Support

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<td>2</td>
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### Section C: Comparison of Public Support Percentages

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<tr>
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<td>Total grants</td>
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**Note:** The table contains placeholders for values that need to be filled in based on the organization's financial data.
Section A. Public Support

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<th>Year</th>
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Section B. Total Support

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<th>Total Support</th>
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</thead>
<tbody>
<tr>
<td>2022</td>
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</tbody>
</table>

Section C. Computation of Public Support Percentage

1. Calculate the percentage of public support by dividing the public support by the total support.

Section D. Computation of Investment Income Percentage

1. Calculate the percentage of investment income by dividing the investment income by the total support.
Section A: All Supporting Organizations

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</table>
Section A. Type I Supporting Organizations

<table>
<thead>
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Section B. Type II Supporting Organizations

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Section C. All Type II Supporting Organizations

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<th>Yes</th>
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Section D. Type III Functionally Integrated Supporting Organizations

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<tr>
<td>Section A: Additional Information</td>
<td>FY 17/18 Total</td>
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<tr>
<td>---------------------------------</td>
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</tr>
<tr>
<td>a. Description of program initiatives</td>
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<td>b. Description of program initiatives</td>
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<tr>
<td>c. Description of program initiatives</td>
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<td>d. Description of program initiatives</td>
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<tr>
<td>f. Description of program initiatives</td>
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<tr>
<td>g. Description of program initiatives</td>
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<tr>
<td>h. Description of program initiatives</td>
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<tr>
<td>i. Description of program initiatives</td>
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<td>j. Description of program initiatives</td>
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<table>
<thead>
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<th>Section B: Program Amounts</th>
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<th>FY 17/18 Other Additional</th>
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<tr>
<td>1. Aggregate fiscal year of non-fiscal year revenue</td>
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</tr>
<tr>
<td>a. Non-fiscal year revenue</td>
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<tr>
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<td>f. Non-fiscal year revenue</td>
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<td>1. Description of fiscal year of non-fiscal year spending</td>
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<td></td>
</tr>
<tr>
<td>a. Non-fiscal year spending</td>
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<td>b. Non-fiscal year spending</td>
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<td>c. Non-fiscal year spending</td>
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<td>d. Non-fiscal year spending</td>
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<td>e. Non-fiscal year spending</td>
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<td>f. Non-fiscal year spending</td>
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<td>h. Non-fiscal year spending</td>
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<td>i. Non-fiscal year spending</td>
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<td>j. Non-fiscal year spending</td>
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<table>
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<th>Section D: Funding and Financing</th>
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<tr>
<td>1. Description of fiscal year of non-fiscal year revenue</td>
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<td></td>
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<tr>
<td>a. Non-fiscal year revenue</td>
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<td>f. Non-fiscal year revenue</td>
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<td>g. Non-fiscal year revenue</td>
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<td>h. Non-fiscal year revenue</td>
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<table>
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<tr>
<th>Section E: Summary</th>
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<tbody>
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### Part I - Type III Non Functionally Integrated Entities, Reporting Organizations (continued)

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<th>Column 2</th>
<th>Column 3</th>
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<tr>
<td></td>
<td></td>
<td>Dollar</td>
<td>Dollars in thousands</td>
<td>Dollars in thousands</td>
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</tbody>
</table>

#### Section A - Distribution Information (for non-exempt)

- Distribution amount for 2023 year ended Dec 31, 2023
- Distribution amount for 2022 year ended Dec 31, 2022
- Distribution amount for 2021 year ended Dec 31, 2021
- Distribution amount for 2020 year ended Dec 31, 2020
- Distribution amount for 2019 year ended Dec 31, 2019
- Distribution amount for 2018 year ended Dec 31, 2018
- Distribution amount for 2017 year ended Dec 31, 2017
- Distribution amount for 2016 year ended Dec 31, 2016
- Distribution amount for 2015 year ended Dec 31, 2015
- Distribution amount for 2014 year ended Dec 31, 2014
- Distribution amount for 2013 year ended Dec 31, 2013

#### Section B - Distribution Information (for exempt)

- Distribution amount for 2023 year ended Dec 31, 2023
- Distribution amount for 2022 year ended Dec 31, 2022
- Distribution amount for 2021 year ended Dec 31, 2021
- Distribution amount for 2020 year ended Dec 31, 2020
- Distribution amount for 2019 year ended Dec 31, 2019
- Distribution amount for 2018 year ended Dec 31, 2018
- Distribution amount for 2017 year ended Dec 31, 2017
- Distribution amount for 2016 year ended Dec 31, 2016
- Distribution amount for 2015 year ended Dec 31, 2015
- Distribution amount for 2014 year ended Dec 31, 2014
- Distribution amount for 2013 year ended Dec 31, 2013
Part II: Conservation Payments

Company C, Inc. has received 

Date: ________________

Section A: Conservation Payments Held by the Organization Held for Taxes

1. Conservation payments held for taxes

Section B: Conservation Payments Held by the Organization Held for Other Purposes

2. Conservation payments held for other purposes

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

Company D, Inc. has received 

Date: ________________

Section A: Collections of Art, Historical Treasures, or Other Similar Assets

1. Collections of art, historical treasures, or other similar assets

Section B: Collections Held for Other Purposes

2. Collections held for other purposes
Form 990: Line 1.5a) Name of organization: John Doe Foundation

Part I: Organizations Maintaining Endowments of $5,000,000 or Other Similar Aggregates

Line 1b) Total assets

Part II: Income and Expenditures

Line 1) Total revenue

Part III: Loans and Liabilities

Line 3) Total liabilities

Part IV: Expenses

Line 3) Total expenses

Part V: Balance Sheet

Line 1) Total assets

Part VI: Board Members

Line 1) Number of board members

Part VII: Other Information

Line 1) Additional information

Schedule A (Form 990): Revenue, Contribution, and Other Income

Line 1) Total revenue

Schedule B (Form 990): Non-cash gifts

Line 1) Value of non-cash gifts
### Part IX: Investments - Program Related

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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### Part X: Other Assets

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### Part XI: Other Liabilities

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<tbody>
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### Part A: Reconciliation of Revenue for Audited Financial Statements With Revenues per Return.

<table>
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<tr>
<th>Description</th>
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<th>RS Amount</th>
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<tbody>
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<td>Total</td>
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</table>

### Part B: Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>RS Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
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<td></td>
</tr>
</tbody>
</table>

### Part C: Supplemental Information.

- Provide the description required for Part 1, Part 2, Part 3, Part 4, Part 5, and Part 6. Also, include the add to provide any additional information.
Compensation Information

Schedule J (Form 990).

Section 9965.

Information about Schedule J, Form 990, and the instructions to this schedule.

2015

Date of Public Availability:

Employee classification shown:

Part I: Questions Regarding Compensation

1. Check the appropriate box(s) if the organization provided any of the following to or for a person listed in Part I-990:
   - [ ] Transfers between persons
   - [ ] Tax returns and financial statements
   - [ ] Tax information, financial statements, and financial reports
   - [ ] Financial statements
   - [ ] Extensive accounting records
   - [ ] Extensive accounting records

2. Ask for the boxes to be checked:
   - Yes
   - No

3. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

4. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

5. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

6. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

7. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

8. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

9. Ask for the organization to include in the list provided for the organization:
   - Yes
   - No

10. Ask for the organization to include in the list provided for the organization:
    - Yes
    - No

11. Ask for the organization to include in the list provided for the organization:
     - Yes
     - No

12. Ask for the organization to include in the list provided for the organization:
     - Yes
     - No

13. Ask for the organization to include in the list provided for the organization:
     - Yes
     - No

14. Ask for the organization to include in the list provided for the organization:
     - Yes
     - No

15. Ask for the organization to include in the list provided for the organization:
     - Yes
     - No

Schedule J (Form 990) 2015
## SCHEDULE L
Transactions With Interested Persons

**Part I** Business Benefit Transactions

<table>
<thead>
<tr>
<th>[ ] Form of transactions</th>
<th>[ ] Purchasing information about the organization</th>
<th>[ ] Description of property</th>
<th>[ ] [ ]</th>
<th>[ ]</th>
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<tbody>
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</table>

**Part II** Loans to and/or From Identified Persons

<table>
<thead>
<tr>
<th>[ ] Form of transactions</th>
<th>[ ] Purchasing information about the organization</th>
<th>[ ] Description of property</th>
<th>[ ] [ ]</th>
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**Part III** Grants or Assistance Benefiting Interested Persons

<table>
<thead>
<tr>
<th>[ ] Form of transactions</th>
<th>[ ] Purchasing information about the organization</th>
<th>[ ] Description of property</th>
<th>[ ] [ ]</th>
<th>[ ]</th>
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### FACT 1: Business Transactions Involving Interested Persons

<table>
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<tr>
<th>Party</th>
<th>Nature of Interest</th>
<th>Description of Transaction</th>
<th>Date/Time</th>
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### FACT 2: Supplemental Information

Provide additional information in response to questions in Section 1, and submit:

- Statement 1, Page 1
- Statement 2, Page 2
- Additional information as needed.

- Date of Event: [Date]

- Statement completed on [Date].

- Reviewer: [Name]

- Date of Review: [Date]
**Noncash Contributions**

**Schedule M**

**Form 990**

**2015**

**Part I: Types of Property**

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<tr>
<th>Column</th>
<th>Description</th>
<th>2015 Code</th>
<th>Fair Market Value</th>
<th>Noncash Contribution</th>
<th>Book Value of Property or Services</th>
<th>Carrying Value of Property or Services</th>
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<tr>
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<td>Copyrights</td>
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<td>Collectibles</td>
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<td>5</td>
<td>Clothing and household items</td>
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<td>Other nonprofit assets</td>
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</table>

**Footnotes**

- **Purpose of the Contribution:**

  - **Goal:** To provide support for the organization's mission.
  - **Description:** The contribution is intended to support specific programs or projects.

**Further Information:**

- **Organizational Information:**
  - **Name:** [Name of Organization]
  - **Address:** [Address of Organization]

**Additional Notes:**

- **Special Instructions:**
  - For taxpayers, please refer to the instructions for Form 990.