Form **990**

Return of Organization Exempt From Income Tax

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

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

OMB No. 1545-0047

Open to Public

Department of the Treasury Go to www.irs.gov/Form990 for instructions and the latest information. Inspection Internal Revenue Service For the 2023 calendar year, or tax year beginning 2023, and ending 20 Check if applicable: C Name of organization Parkinson Research Foundation Inc D Employer identification number Address change Doing business as 20-0205035 E Telephone number Name change Number and street (or P.O. box if mail is not delivered to street address) Room/suite Initial return 5969 Cattleridge Blvd 100 (941)870-4438 Final return/terminated City or town, state or province, country, and ZIP or foreign postal code G Gross receipts Amended return Sarasota, FL 34232 6,129,039 X No Application pending F Name and address of principal officer: Lawrence Hoffheimer H(a) Is this a group return for subordinates? Same as C above H(b) Are all subordinates included? X 501(c)(3) 501(c) (4947(a)(1) or 527 If "No," attach a list. See instructions parkinsonresearchfoundation.org Website: H(c) Group exemption number X Corporation Trust Association L Year of formation: 2005 M State of legal domicile: FLPart I Summary Briefly describe the organization's mission or most significant activities: The MISSION of the PARKINSON RESEARCH FOUNDATION is to help find a cure for Parkinson's disease through funding research, while Activities & Governance providing education and services that improve the quality of life today for Parkinson patients and their caregivers. Check this box | if the organization discontinued its operations or disposed of more than 25% of its net assets. Number of voting members of the governing body (Part VI, line 1a) 3 4 1 5 Total number of individuals employed in calendar year 2023 (Part V, line 2a) Total number of volunteers (estimate if necessary) 6 Total unrelated business revenue from Part VIII, column (C), line 12 0 **b** Net unrelated business taxable income from Form 990-T, Part I, line 11 7b 0 Prior Year **Current Year** Contributions and grants (Part VIII, line 1h) 2,161,599 2,266,589 Revenue 0 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 30,173 (29,054)11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 144,000 160,780 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) 12 2,335,772 2,398,315 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 332,230 321,308 Benefits paid to or for members (Part IX, column (A), line 4) 0 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 384,721 401,071 75,439 30,000 Total fundraising expenses (Part IX, column (D), line 25) Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 1,221,248 1,463,854 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 2,002,716 2,227,155 Revenue less expenses. Subtract line 18 from line 12 333,056 171,160 **Beginning of Current Year** End of Year 20 Total assets (Part X, line 16) 2,683,587 2,394,725 21 Total liabilities (Part X, line 26) 114,820 137,857 Net assets or fund balances. Subtract line 21 from line 20 2,279,905 2,545,730 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 Linda Patterson Sign Signature of officer Date Here Linda Patterson, Treasurer Type or print name and title PTIN Print/Type preparer's name Preparer's signature Date Check **Paid** Linda Patterson 08-14-2024 P00543037 self-employed Preparer Firm's name Linda Patterson CPA PA Firm's EIN **Use Only** 5732 Whistlewood Circle Firm's address Phone no. Sarasota FL 34232 941-735-4042

May the IRS discuss this return with the preparer shown above? See instructions

No

Yes

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 | 1 | X | |
| 3 | Is the organization required to complete Schedule B, Schedule of Contributors? See instructions | 2 | х | |
| | candidates for public office? If "Yes," complete Schedule C, Part L | 3 | | Х |
| 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? <i>If</i> "Yes," <i>complete Schedule C, Part II.</i> | 4 | | x |
| 5 | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, | | | |
| | assessments, or similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III | 5 | | х |
| 6 | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors | | | |
| | have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If | | | |
| | "Yes," complete Schedule D, Part I | 6 | | х |
| 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 | 7 | | Х |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," | | | |
| | complete Schedule D, Part III | 8 | | Х |
| 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 | | | |
| 40 | debt negotiation services? If "Yes," complete Schedule D, Part IV | 9 | | X |
| 10 | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? If "Yes," complete Schedule D, Part V | 10 | | |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, | 10 | | Х |
| •• | VII, VIII, IX, or X, as applicable. | | | |
| 2 | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," | | | |
| | complete Schedule D, Part VI | 11a | x | |
| k | Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more | | | |
| | of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII | 11b | | х |
| 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 | 11c | | х |
| c | 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 | 11d | | х |
| e | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X | 11e | | Х |
| f | | | | |
| 40- | the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part.X | 11f | Х | |
| 12a | | 120 | | |
| h | Schedule D, Parts XI and XII | 12a | X | |
| U | Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | 12b | | x |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 13 | | X |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | 14a | | х |
| 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 | 14b | | 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 I.V | 15 | | х |
| 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 JV | 16 | | Х |
| 17 | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on | | | |
| 40 | Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions | 17 | х | |
| 18 | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on | 40 | | |
| 10 | Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II | 18 | | Х |
| 19 | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Ves." complete Schedule G. Part III. | 10 | | v |
| 20a | If "Yes," complete Schedule G, Part III | 19 20a | | x |
| zua b | | 20a | | |
| 21 | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or | | | |
| - | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II | 21 | x | |
| _ | | | | |

Form 990 (2023) Parkinson Research Foundation Inc 20-0205035 Page 4 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 | 22 | | х |
| 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 | 23 | х | |
| 24a | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than | | | |
| | \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b | | | |
| | through 24d and complete Schedule K. If "No," go to line 25a | 24a | | х |
| b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| С | Did the organization maintain an escrow account other than a refunding escrow at any time during the year | | | |
| | to defease any tax-exempt bonds? | 24c | | |
| d | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | 24d | | |
| 25a | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit | | | |
| | transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I | 25a | | х |
| b | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior | | | |
| | year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? | | | |
| | If "Yes," complete Schedule L, Part I | 25b | | х |
| 26 | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current | | | |
| | or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% | | | |
| | controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part.II | 26 | | х |
| 27 | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key | | | |
| | employee, creator or founder, substantial contributor or employee thereof, a grant selection committee | | | |
| | member, or to a 35% controlled entity (including an employee thereof) or family member of any of these | | | |
| | persons? If "Yes," complete Schedule L, Part III | 27 | | х |
| 28 | Was the organization a party to a business transaction with one of the following parties (See the Schedule | | | |
| | L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions). | | | |
| а | A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If | | | |
| | "Yes," complete Schedule L, Part IV | 28a | | х |
| b | A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV | 28b | х | |
| С | A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If | | | |
| | "Yes," complete Schedule L, Part IV | 28c | | х |
| 29 | Did the organization receive more than \$25,000 in noncash contributions? If "Yes," complete Schedule M | 29 | | х |
| 30 | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified | | | |
| | conservation contributions? If "Yes," complete Schedule M | 30 | | х |
| 31 | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part J | 31 | | х |
| 32 | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," | | | |
| | complete Schedule N, Part II | 32 | | х |
| 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 L | 33 | | х |
| 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 | 34 | х | |
| 35a | Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 35a | | х |
| 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 | 35b | | |
| 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 | 36 | | х |
| 37 | Did the organization conduct more than 5% of its activities through an entity that is not a related organization | | | Λ |
| •• | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part.VI | 37 | | х |
| 38 | Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and | " | | Λ |
| | 19? Note : All Form 990 filers are required to complete Schedule O | 38 | x | |
| | 10: Note: All 1 offit 300 fileto die required to complete Schedule O | J0 | Λ | |

Part V

| | | | | | Yes | NO |
|----|--|----|---|----|-----|----|
| 1a | Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable | 1a | 4 | | | |
| b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable | 1b | 0 | | | |
| С | Did the organization comply with backup withholding rules for reportable payments to vendors and | | | | | |
| | reportable gaming (gambling) winnings to prize winners? | | | 1c | x | |

| Pai | Statements Regarding Other IRS Filings and Tax Compliance (continued) | | | Yes | No |
|------------|---|---------------|----------|-----|----|
| 2 a | 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 | | | | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? | T T | 2b | Х | |
| 3a | Did the organization have unrelated business gross income of \$1,000 or more during the year? | t t | 3a | | Х |
| b | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O | | 3b | | |
| 4a | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, | | | | |
| | a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | | 4a | | Х |
| b | If "Yes," enter the name of the foreign country | | | | |
| | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAF | · | | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | t t | 5a | | Х |
| b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | t t | 5b | | Х |
| С | If "Yes" to line 5a or 5b, did the organization file Form 8886-T? | | 5с | | |
| 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? | | 6a | | Х |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or | | | | |
| | gifts were not tax deductible? | | 6b | | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | | | | |
| а | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods | | | | |
| | and services provided to the payor? | i | 7a | | Х |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | • • • • • • • | 7b | | |
| С | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was | | _ | | |
| | required to file Form 8282? | 1 1 | 7с | | Х |
| d | , | 'd | _ | | |
| e | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | t t | 7e | | X |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | t t | 7f | | х |
| g | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as rec | | 7g 7h | | |
| h 8 | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the | • • • • • • • | /11 | | |
| Ü | sponsoring organizations maintaining donor advised funds. Bid a donor advised fund maintained by the | | 8 | | |
| 9 | Sponsoring organizations maintaining donor advised funds. | | | | |
| а | Did the sponsoring organization make any taxable distributions under section 4966? | | 9a | | |
| b | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | t t | 9b | | |
| 10 | Section 501(c)(7) organizations. Enter: | | | | |
| а | Initiation fees and capital contributions included on Part VIII, line 12 |)a | | | |
| b | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities |)b | | | |
| 11 | Section 501(c)(12) organizations. Enter: | ' | | | |
| а | Gross income from members or shareholders | a | | | |
| b | Gross income from other sources. (Do not net amounts due or paid to other sources | | | | |
| | against amounts due or received from them.) | b | | | |
| 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 | 2b | | | |
| 13 | Section 501(c)(29) qualified nonprofit health insurance issuers. | | | | |
| а | Is the organization licensed to issue qualified health plans in more than one state? | | 13a | | |
| | 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 | | | | |
| С | Enter the amount of reserves on hand | | | | |
| 14a | Did the organization receive any payments for indoor tanning services during the tax year? | t | 14a | | Х |
| b 45 | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O | • • • • • • • | 14b | | |
| 15 | Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or | | 15 | | |
| | excess parachute payment(s) during the year? | | 15 | | Х |
| 16 | If "Yes," see the instructions and file Form 4720, Schedule N. Is the organization an educational institution subject to the section 4968 excise tax on net investment income? | | 16 | | v |
| 10 | If "Yes," complete Form 4720, Schedule O. | | 10 | | X |
| 17 | Section 501(c)(21) organizations. Did the trust, or any disqualified or other person, engage in any activities | | | | |
| | that would result in the imposition of an excise tax under section 4951, 4952, or 4953? | | 17 | | |
| | If "Yes," complete Form 6069. | | | | |
| _ | | | | | |

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 on Schedule O. See instructions.

| Se | ction 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 | <u>.</u> | | |
| | 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 on Schedule O. | | | |
| b | Enter the number of voting members included in line 1a, above, who are independent | | | |
| 2 | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with | | | |
| | any other officer, director, trustee, or key employee? | 2 | x | |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct | | | |
| | supervision of officers, directors, trustees, or key employees to a management company or other person? | 3 | | х |
| 4 | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? | 4 | | х |
| 5 | Did the organization become aware during the year of a significant diversion of the organization's assets? | 5 | | х |
| 6 | Did the organization have members or stockholders? | 6 | | х |
| 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 | | х |
| 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 | | х |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during | | | |
| | the year by the following: | | | |
| а | The governing body? | 8a | х | |
| b | Each committee with authority to act on behalf of the governing body? | 8b | | х |
| 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 on Schedule Q | 9 | | x |
| Sec | tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) | | | |
| | | | Yes | No |
| 10a | Did the organization have local chapters, branches, or affiliates? | 10a | | х |
| 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 | х | |
| b | Describe on 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 | х | |
| b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | 12b | х | |
| С | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," | | | |
| | describe on Schedule O how this was done | 12c | х | |
| 13 | Did the organization have a written whistleblower policy? | 13 | х | |
| 14 | Did the organization have a written document retention and destruction policy? | 14 | х | |
| 15 | Did the process for determining compensation of the following persons include a review and approval by | | | |
| | independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? | | | |
| а | The organization's CEO, Executive Director, or top management official | 15a | | х |
| b | Other officers or key employees of the organization | 15b | | х |
| | If "Yes" to line 15a or 15b, describe the process on 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 | | х |
| 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 | | |
| Sec | tion C. Disclosure | | | |
| 17 | List the states with which a copy of this Form 990 is required to be filed Statement #17 | | | |
| 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. | | | |
| | X Own website X Upon request □ Other (explain on Schedule O) | | | |
| 19 | Describe on 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. | | | |
| | Linda Patterson (941)870-4438, 5969 Cattleridge Blvd, Suite 100, Sarasota, FL 3423 | 2 | | |

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

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

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 the 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, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) 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.

See instructions for the order in which to list the persons above.

| Check this box if neither the organization nor any relat | ed organizat | ion co | mper | ารสเ | ea a | ny curi | ent | officer, director, or | trustee. | |
|--|---|--|-----------------------|---------|--------------|------------------------------|--------|--|---|---|
| | | | • | | (C) | - | | ŕ | | |
| (A) Name and title | (B) Average hours per week | 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/ | (E) Reportable compensation from related | (F) Estimated amount of other compensation from the |
| | (list any hours for related organizations below dotted line) | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | organization (W-2/ 1099-MISC/ 1099-NEC) | 1099-MISC/ 1099-MISC/ | |
| (1)Lawrence Hoffheimer | 20.00 | | | | | | | | | |
| Chairman of the Board | 25.00 | х | | х | | | | 111,390 | 178,890 | 5,727 |
| (2)Linda Patterson | 20.00 | | | | | | | | | |
| Treasurer | 20.00 | х | | х | | | | 65,000 | 102,500 | 0 |
| (3)Donna J Auger | | | | | | | | | | |
| Director | 40.00 | х | | | | | | 0 | 144,000 | 989 |
| (4)Dustin Tenney | 15.00 | | | | | | | | | |
| Employee | 25.00 | | | | | х | | 36,898 | 81,146 | 21,001 |
| (5)Amy Carroll | 2.00 | | | | | | | | | |
| Secretary | 2.00 | х | | х | | | | 0 | 0 | 0 |
| _(6) | | | | | | | | | | |
| _(7) | | | | | | | | | | |
| _(8) | | | | | | | | | | |
| <u>(9)</u> | | | | | | | | | | |
| (10) | | | | | | | | | | |
| (11) | | | | | | | | | | |
| (12) | | | | | | | | | | |
| (13) | | · | | | | | | | | |
| (14) | | · · · | | | | | | | | |

EEA Form **990** (2023)

| (A) Name and title | (B) Average hours per week | (C) Position (do not check more than one box, unless person is both ar officer and a director/trustee) | | | | | | (D) Reportable compensation from the organization (W-2/ | (E) Reporta compensa from rela organization | able ation ated | cor | (F) ated am of other mpensat | r |
|--|---|--|-----------------------|---------|--------------|------------------------------|-----------|--|--|-----------------------|---------|------------------------------|----------|
| | (list any hours for related organizations below dotted line) | or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | 1099-MISC/ 1099-NEC) | 1099-MI 1099-NE | ISC/ | orga | nization d organi: | |
| <u>(15)</u> | | | | | | | | | | | | | |
| <u>(16)</u> | | | | | | | | | | | | | |
| (17) | | | | | | | | | | | | | |
| <u>(18)</u> | | | | | | | | | | | | | |
| <u>(19)</u> | | | | | | | | | | | | | |
| <u>(20)</u> | | | | | | | | | | | | | |
| (21) | | | | | | | | | | | | | |
| (22) | | | | | | | | | | | | | |
| (23) | | | | | | | | | | | | | |
| (24) | | | | | | | | | | | | | |
| <u>(25)</u> | | | | | | | | | | | | | |
| to Subtotal | Section A | | | | | | | 213,288 received more th | | ,536 ,000 of | | 27, | 717 |
| 3 Did the organization list any former officer, or | | key en | nploy | /ee, | or h | ighest | con | npensated | | | | Yes | No |
| employee on line 1a? If "Yes," complete Sch For any individual listed on line 1a, is the sum organization and related organizations great | of reportable con | mpens | ation | and | othe | er com | pen | sation from the | | • • • • | 3 | | X |
| individual | | | | | elate | ed oraa | aniza | | | | 4 | х | |
| for services rendered to the organization? If Section B. Independent Contractors | • | | - | | | _ | | | | | 5 | | х |
| Complete this table for your five highes compensation from the organization. Re (A) | • | - | | | | | | | | | | tax y | ear. |
| Name and business a | | | | - | | | | Description of service | | | Compens | | |
| DirectMail.com, 5540 Ketch Road Pr | ince Frede | rıck | MD | 20 | ь | | υır | ect Mail Ser | VIC | | | 383, | <u> </u> |
| | | | | | | | | | | | | | |
| 2 Total number of independent contractor received more than \$100,000 of compe | | | | | | ose li | stec | d above) who | 1 | | | | |

| | | Check if Schedule O |) contai | ns a resp | oons | e or note to any li | ine in this Part V | 711 | | |
|--|-----|--|---------------|---------------|-----------|---------------------|----------------------|--|--------------------------------------|--|
| | | | | | | | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512–514 |
| | 1a | Federated campaigns . | | | 1a | | | | | |
| | b | Membership dues | | ŀ | 1b | | | | | |
| Contributions, Gifts, Grants and Other Similar Amounts | C | Fundraising events | | F | 1c | | | | | |
| g D D | d | Related organizations . | | F | 1d | | | | | |
| ffs, r An | e | Government grants (contr | | F | 1e | | | | | |
| , <u>ia</u> | f | All other contributions, gif | | · | | | | | | |
| Sin | | and similar amounts not in | - | | 1f | 2,266,589 | | | | |
| buti ther | q | Noncash contributions inc | | ŀ | | | | | | |
| d dri | 3 | lines 1a-1f | | | 1g | \$ | | | | |
| နှင့် | h | | | _ | | | 2,266,589 | | | |
| | | Totali 7 laa iii loo Ta Ti | | | | Business Code | 2,200,505 | | | |
| | 2a | | | | | 240000 0040 | | | | |
| 8 | b | | | | | | | | | |
| ie er | C | | | | | | | | | |
| ıram Serv Revenue | d | - | | | | | | | | |
| grar Re | e | - | | | | | | | | |
| Program Service Revenue | _ | All other program service | revenue | | | | | | | |
| ш | | Total. Add lines 2a-2f . | | | | | | | | |
| | | | | | | | | | | |
| | 3 | Investment income (includi other similar amounts) . | | | | | 54,199 | 54,199 | | |
| | 4 | Income from investment of | | | | - | 34,133 | 34,133 | | |
| | 5 | Royalties | | • | • | - t | | | | |
| | " | Noyanics | | (i) Real | • • • | (ii) Personal | | | | |
| | 6a | Gross rents | 6a | 160, | 780 | (II) Fersorial | | | | |
| | | Less: rental expenses | | 100, | 700 | | | | | |
| | | Rental income or (loss) | 6c | 160, | 700 | | | | | |
| | 1 | Net rental income or (loss) | . ——— | | | | 160,780 | 160,780 | | |
| | | | ′ | (i) Securitie | | (ii) Other | 100,700 | 100,700 | | |
| | 7a | Gross amount from | | (i) Securitie | 5 | (II) Other | | | | |
| | | sales of assets other than inventory | 72 | 2 6 4 7 | 171 | | | | | |
| | h | other than inventory Less: cost or other basis | 7a | 3,647, | 4 / I | | | | | |
| • | " | and sales expenses | 7b | 2 720 | 724 | | | | | |
| venue | _ | Gain or (loss) | | 3,730, | | | | | | |
| | | | | (83, | | | (02.252) | (02.252) | | |
| Ř | | Net gain or (loss) Gross income from fundral | | | · - | | (83,253) | (83,253) | | |
| Other Re | oa | events (not including \$ | isiriy | | | | | | | |
| 0 | | _ | n line | | | | | | | |
| | | of contributions reported o 1c). See Part IV, line 18 | | | 8a | | | | | |
| | h | Less: direct expenses . | | | 8b | | | | | |
| | | Net income or (loss) from t | | | | | | | | |
| | l . | Gross income from gaming | | ing events | ` <u></u> | | | | | |
| | Эа | activities. See Part IV, line | - | | 9a | | | | | |
| | h | Less: direct expenses . | | | 9b | | | | | |
| | l . | Net income or (loss) from | | | | | | | | |
| | | | | activities | Ė | | | | | |
| | 10a | Gross sales of inventory, le returns and allowances . | | | 10a | | | | | |
| | h | Less: cost of goods sold | | | 10a | | | | | |
| | l l | Net income or (loss) from s | | | | | | | | |
| | C | iver income or (ioss) from s | saits Ul | inveniory | • • | Business Code | | | | |
| | 11- | | | | | Business Code | | | | |
| Miscellanous Revenue | 11a | | | | | | | | | |
| scellanor Revenue | b | | | | | | | | | |
| scel ≷eve | C | All other recessor | | | | | | | | |
| Σij | | All other revenue | | | | | | | | |
| | | Total revenue See instru | | | | | 0 200 21- | 707 -0- | - | _ |
| | 14 | Total revenue. See instru | JUUONS | | | | 2,398,315 | 131,726 | 0 | 0 |

Form **990** (2023)

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).

| | tion 501(c)(3) and 501(c)(4) organizations must comple Check if Schedule O contains a response or n | | D (1)/ | | · ´ = |
|--------|--|--------------------|--------------------------|-----------------------|----------------------|
| Do r | not include amounts reported on lines 6b, 7b, | (A) Total expenses | (B) | (C) Management and | (D) |
| 8b, 9 | 9b, and 10b of Part VIII. | i otai expenses | Program service expenses | general expenses | Fundraising expenses |
| 1 | Grants and other assistance to domestic organizations | | | | |
| | and domestic governments. See Part IV, line 21 | 332,230 | 332,230 | | |
| 2 | Grants and other assistance to domestic | | | | |
| | individuals. See Part IV, line 22 | | | | |
| 3 | Grants and other assistance to foreign | | | | |
| | organizations, foreign governments, and | | | | |
| | foreign individuals. See Part IV, lines 15 and 16 | | | | |
| 4 | Benefits paid to or for members | | | | |
| 5 | Compensation of current officers, directors, | | | | |
| | trustees, and key employees | 176,390 | 88,195 | 88,195 | |
| 6 | Compensation not included above to disqualified | , | | , | |
| | persons (as defined under section 4958(f)(1)) and | | | | |
| | persons described in section 4958(c)(3)(B) | | | | |
| 7 | Other salaries and wages | 122,542 | 75,047 | 38,121 | 9,374 |
| 8 | Pension plan accruals and contributions (include | 122,312 | .5,017 | 33,121 | 2,3,4 |
| • | section 401(k) and 403(b) employer contributions) | | | | |
| 9 | Other employee benefits | 79,236 | 43,952 | 23,628 | 11,656 |
| 10 | Payroll taxes | 22,903 | 12,511 | 9,675 | 717 |
| 11 | Fees for services (nonemployees): | 22,505 | 12,311 | 3,073 | 717 |
| | Management | | | | |
| b | Legal | | | | |
| C | Accounting | 7,850 | 3,925 | 3,925 | |
| d | Lobbying | 7,650 | 3,923 | 3,925 | |
| | Professional fundraising services. See Part IV, line 17. | 30,000 | | | 30 000 |
| e f | Investment management fees | 30,000 | | 14 004 | 30,000 |
| | Other. (If line 11g amount exceeds 10% of line 25, column | 14,994 | | 14,994 | |
| g | ` | 460 070 | 216 052 | 40 247 | 204 670 |
| 12 | (A), amount, list line 11g expenses on Schedule O.) Advertising and promotion | 469,878 | 216,952 | 48,247 | 204,679 |
| 13 | _ | F0 163 | 40 130 | 0.000 | 1 003 |
| 14 | Office expenses | 50,162 | 40,130 | 9,029 | 1,003 |
| | Information technology | 240 | 192 | 43 | 5_ |
| 15 | Royalties | 030 040 | 105 634 | 41 560 | 4 640 |
| 16 | Occupancy | 232,042 | 185,634 | 41,768 | 4,640 |
| 17 | Travel | | | | |
| 18 | Payments of travel or entertainment expenses | | | | |
| 40 | for any federal, state, or local public officials | | | | |
| 19 | Conferences, conventions, and meetings | | | | |
| 20 | Interest | | | | |
| 21 | Payments to affiliates | | | | |
| 22 | Depreciation, depletion, and amortization | 2,182 | | 2,182 | |
| 23 | Insurance | 8,341 | 6,672 | 1,502 | 167 |
| 24 | Other expenses. Itemize expenses not covered | | | | |
| | above (List miscellaneous expenses on line 24e. If | | | | |
| | line 24e amount exceeds 10% of line 25, column | | | | |
| | (A), amount, list line 24e expenses on Schedule O.) | | | | |
| а | List Rental | 111,556 | 50,200 | 11,156 | 50,200 |
| b | Postage and Paper | 520,061 | 234,483 | 52,111 | 233,467 |
| С | Telephone & Internet | 17,249 | 13,799 | 3,105 | 345 |
| d | State Registrations | 3,469 | 1,561 | 347 | 1,561 |
| е | All other expenses | 25,830 | 20,665 | 4,649 | 516 |
| 25 | Total functional expenses. Add lines 1 through 24e | 2,227,155 | 1,326,148 | 352,677 | 548,330 |
| 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 X if | | | | |
| | following SOP 98-2 (ASC 958-720) | 1,114,455 | 445,782 | 111,445 | 557,228 |

Part X **Balance Sheet**

| | | Check if Schedule O contains a response or note | to an | y line in this Part X | | | |
|-----------------------------|-----|--|-------------|-----------------------|-------------------|--------|-------------|
| | | | | | (A) | | (B) |
| | | | | | Beginning of year | | End of year |
| | 1 | Cash - non-interest-bearing | | | 965,642 | 1 | 604,155 |
| | 2 | Savings and temporary cash investments | | | | 2 | |
| | 3 | Pledges and grants receivable, net | | [| | 3 | |
| | 4 | Accounts receivable, net | [| | 4 | | |
| | 5 | Loans and other receivables from any current or former of | | | | | |
| | | trustee, key employee, creator or founder, substantial con | tributo | or, or 35% | | | |
| | | controlled entity or family member of any of these person | is . | | | 5 | |
| | 6 | Loans and other receivables from other disqualified person | ons (as | s defined | | | |
| | | under section 4958(f)(1)), and persons described in secti | 58(c)(3)(B) | | 6 | | |
| | 7 | Notes and loans receivable, net | | | | 7 | 6,446 |
| ets | 8 | Inventories for sale or use | | | | 8 | |
| Assets | 9 | Prepaid expenses and deferred charges | | 24,105 | 9 | 26,828 | |
| , | 10a | Land, buildings, and equipment: cost or other | | | | | |
| | | | 10a | 188,195 | | | |
| | b | · | 10b | 178,354 | 2,572 | 10c | 9,841 |
| | 11 | Investments - publicly traded securities | 1,402,406 | 11 | 2,036,317 | | |
| | 12 | Investments - other securities. See Part IV, line 11 | | 12 | | | |
| | 13 | Investments - program-related. See Part IV, line 11 | | 13 | | | |
| | 14 | Intangible assets | | 14 | | | |
| | 15 | Other assets. See Part IV, line 11 | | | | 15 | |
| | 16 | Total assets. Add lines 1 through 15 (must equal line 3 | | F | 2,394,725 | 16 | 2,683,587 |
| | 17 | Accounts payable and accrued expenses | , | | 114,820 | 17 | 137,857 |
| | 18 | Grants payable | | | | 18 | |
| | 19 | Deferred revenue | | | | 19 | |
| | 20 | Tax-exempt bond liabilities | | 20 | | | |
| | 21 | Escrow or custodial account liability. Complete Part IV of | | F | | 21 | |
| , 0 | 22 | Loans and other payables to any current or former office | | | | | |
| Liabilities | | trustee, key employee, creator or founder, substantial con | | | | | |
| lige | | controlled entity or family member of any of these person | | | | 22 | |
| Ë | 23 | Secured mortgages and notes payable to unrelated third | | • | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third pa | | | | 24 | |
| | 25 | Other liabilities (including federal income tax, payables to | | F | | | |
| | | parties, and other liabilities not included on lines 17-24). | | | | | |
| | | of Schedule D | | | | 25 | |
| | 26 | Total liabilities. Add lines 17 through 25 | | F | 114,820 | 26 | 137,857 |
| | | Organizations that follow FASB ASC 958, check here | | | | | |
| | | and complete lines 27, 28, 32, and 33. | | | | | |
| ces | 27 | | | | 2,279,905 | 27 | 2,545,730 |
| ılan | 28 | | | | | 28 | |
| l Ba | | Organizations that do not follow FASB ASC 958, chec | ck her | e 🗆 | | | |
| nu | | and complete lines 29 through 33. | | | | | |
| ΓĒ | 29 | | | | | 29 | |
| ts c | 30 | Paid-in or capital surplus, or land, building, or equipment | | | | 30 | |
| sse | 31 | Retained earnings, endowment, accumulated income, or | | | | 31 | |
| Net Assets or Fund Balances | 32 | Total net assets or fund balances | | | 2,279,905 | 32 | 2,545,730 |
| ž | 33 | Total liabilities and net assets/fund balances | | <u> </u> | 2,394,725 | 33 | 2,683,587 |
| | | | • • | | 2,351,123 | - 50 | 2,003,307 |

EEA Form 990 (2023)

| Pa | rt XI Reconciliation of Net Assets | | | | |
|-----|---|----|------|----------------|--------|
| | Check if Schedule O contains a response or note to any line in this Part XI | | | | |
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 2, | 398, | 315 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 2, | 227, | 155 |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | | 171, | ,160 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) | 4 | 2, | 279, | 905 |
| 5 | Net unrealized gains (losses) on investments | 5 | | 94, | ,665 |
| 6 | Donated services and use of facilities | 6 | | | |
| 7 | Investment expenses | 7 | | | |
| 8 | Prior period adjustments | 8 | | | |
| 9 | Other changes in net assets or fund balances (explain on Schedule O) | 9 | | | 0 |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line | | | | |
| | 32, column (B)) | 10 | 2, | 545, | 730 |
| Pa | rt XII Financial Statements and Reporting | | | | |
| | Check if Schedule O contains a response or note to any line in this Part XII | | | | |
| | | | | Yes | No |
| 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 on | | | | |
| | Schedule O. | | | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | | . 2a | | х |
| | 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? | | . 2b | х | |
| | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a | | | | |
| | separate basis, consolidated basis, or both. | | | | |
| | Separate basis Consolidated basis Both consolidated and separate basis | | | | |
| С | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of | | | | |
| | the audit, review, or compilation of its financial statements and selection of an independent accountant? | | . 2c | | х |
| | If the organization changed either its oversight process or selection process during the tax year, explain on | | | | |
| | 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 | | | | |
| | Uniform Guidance, 2 C.F.R. Part 200, Subpart F? | | . 3a | | х |
| 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 on Schedule O and describe any steps taken to undergo such audits | | . 3b | | |
| EEA | | | Form | 1 990 (| (2023) |

SCHEDULE A (Form 990)

Public Charity Status and Public Support

OMB No. 1545-0047

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

Department of the Treasury Internal Revenue Service Name of the organization

Attach to Form 990 or Form 990-EZ. Go to www.irs.gov/Form990 for instructions and the latest information. **Open to Public** Inspection

Employer identification number

| | | son Research Foundation | | | | | 20-020503 | | | | |
|-------|------|---|------------------------------|---|------------------------------------|---------------|---|-----------------|------------------------------------|--|--|
| Par | t I | Reason for Public Cha | rity Status. (Al | II organizations mus | st comple | ete this p | oart.) See instruction | ons. | | | |
| The o | rgaı | nization is not a private foundation be | • | • | • | • | | | | | |
| 1 | | A church, convention of churches, | or association of c | hurches described in se | ction 170 | b)(1)(A)(i) |) . | | | | |
| 2 | | A school described in section 170 | (b)(1)(A)(ii). (Attac | ch Schedule E (Form 990 | 0).) | | | | | | |
| 3 | | A hospital or a cooperative hospital | l service organizat | ion described in section | 170(b)(1) | (A)(iii). | | | | | |
| 4 | | A medical research organization of | perated in conjunct | tion with a hospital desc | ribed in se | ction 170 | (b)(1)(A)(iii). Enter the | | | | |
| | | hospital's name, city, and state: | | | | | | | | | |
| 5 | | An organization operated for the be | nefit of a college o | r university owned or ope | erated by a | a governm | ental unit described in | | | | |
| | | section 170(b)(1)(A)(iv). (Complet | • | | | | | | | | |
| 6 | Ц | A federal, state, or local governme | • | | | | | | | | |
| 7 | X | , | • | | jovernmen | tal unit or f | rom the general public | | | | |
| | _ | described in section 170(b)(1)(A)(| | , | | | | | | | |
| 8 | Ц | A community trust described in sec | ction 170(b)(1)(A) | (vi). (Complete Part II.) | | | | | | | |
| 9 | | An agricultural research organization | on described in se | ction 170(b)(1)(A)(ix) o | perated in | conjunctio | n with a land-grant coll | ege | | | |
| | | or university or a non-land-grant co | llege of agriculture | (see instructions). Enter | the name, | city, and s | tate of the college or | | | | |
| | _ | university: | | | | | | | | | |
| 10 | | An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) | | | | | | | | | |
| 11 | Ш | An organization organized and ope | erated exclusively t | to test for public safety. S | See sectio | n 509(a)(4 | 1). | | | | |
| 12 | Ш | An organization organized and ope | rated exclusively fo | or the benefit of, to perform | m the func | tions of, or | to carry out the purpos | es of | | | |
| | | one or more publicly supported org | anizations describ | ed in section 509(a)(1) | or section | 509(a)(2) | . See section 509(a)(3 | 3). Chec | k | | |
| | | the box on lines 12a through 12d th | at describes the type | pe of supporting organiza | ation and c | omplete lir | nes 12e, 12f, and 12g. | | | | |
| а | | | ion operated, supe | ervised, or controlled by i | ts support | ed organiz | ation(s), typically by gi | ving | | | |
| | | the supported organization(s) the | he power to regula | rly appoint or elect a ma | jority of the | directors | or trustees of the | | | | |
| | | supporting organization. You r | nust complete Pa | rt IV, Sections A and B | 3. | | | | | | |
| b | | Type II. A supporting organiza | tion supervised or | controlled in connection | with its su | pported or | ganization(s), by havin | g | | | |
| | | control or management of the s | upporting organiza | ation vested in the same p | persons tha | at control o | r manage the supporte | d | | | |
| | | organization(s). You must cor | nplete Part IV, Se | ctions A and C. | | | | | | | |
| С | | | ed. A supporting or | rganization operated in o | connection | with, and | functionally integrated | with, | | | |
| | | its supported organization(s) (s | see instructions). Y | ou must complete Par | t IV, Secti | ons A, D, | and E. | | | | |
| d | | | • | | | | | | | | |
| | | that is not functionally integrate | ŭ | , , | | • | ent and an attentivenes | S | | | |
| | | requirement (see instructions). | • | · | • | | | | | | |
| е | | Check this box if the organization | | | | • • • | I, Type II, Type III | | | | |
| | | functionally integrated, or Type | | integrated supporting o | rganizatior | 1. | | | | | |
| f | | nter the number of supported organ | | | | | • • • • • • • • • • • | • • • | | | |
| g | | rovide the following information abo | | i , | T | | T | | | | |
| | | (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1-10 above (see instructions)) | (iv) Is the of listed in you docum | r governing | (v) Amount of monetary support (see instructions) | other | Amount of support (see structions) | | |
| | | | | | Yes | No | | | | | |
| | | | | | | | | | | | |
| A) | | | | | | | | | | | |
| B) | | | | | | | | | | | |
| C) | | | | | | | | | | | |
| D) | | | | | | | | | | | |
| - | | | | | - | | | | | | |
| E) | | | | | | | | | | | |
| Catal | | | | | | | | | | | |

20-0205035

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| | on A. Public Support | T | | 1 | | | | |
|---------|--|------------------|-----------------|----------------|-----------|-----------|---------------|--|
| Calen | dar year (or fiscal year beginning in) | (a) 2019 | (b) 2020 | (c) 2021 | (d) 2022 | (e) 2023 | (f) Total | |
| 1 | Gifts, grants, contributions, and | | | | | | | |
| | membership fees received. (Do not | | | | | | | |
| | include any "unusual grants.") | 2,468,907 | 1,733,554 | 2,362,525 | 2,161,599 | 2,266,590 | 10,993,175 | |
| 2 | Tax revenues levied for the | | | | | | | |
| | organization's benefit and either paid | | | | | | | |
| | to or expended on its behalf | | | | | | | |
| 3 | The value of services or facilities | | | | | | | |
| | furnished by a governmental unit to the | | | | | | | |
| | organization without charge | | | | | | | |
| 4 | Total. Add lines 1 through 3 | 2,468,907 | 1,733,554 | 2,362,525 | 2,161,599 | 2,266,590 | 10,993,175 | |
| 5 | The portion of total contributions by | | | | | | | |
| | each person (other than a | | | | | | | |
| | governmental unit or publicly | | | | | | | |
| | supported organization) included on | | | | | | | |
| | line 1 that exceeds 2% of the amount | | | | | | | |
| | shown on line 11, column (f) | | | | | | | |
| 6 | Public support. Subtract line 5 from line 4. | | | | | | 10,993,175 | |
| | on B. Total Support | | | | 1 | | T | |
| | dar year (or fiscal year beginning in) | (a) 2019 | (b) 2020 | (c) 2021 | (d) 2022 | (e) 2023 | (f) Total | |
| 7 | Amounts from line 4 | 2,468,907 | 1,733,554 | 2,362,525 | 2,161,599 | 2,266,590 | 10,993,175 | |
| 8 | Gross income from interest, dividends, | | | | | | | |
| | payments received on securities loans, | | | | | | | |
| | rents, royalties, and income from | | | | | | | |
| • | similar sources | 2,766 | 5,805 | 15,207 | 30,284 | 54,199 | 108,261 | |
| 9 | Net income from unrelated business | | | | | | | |
| | activities, whether or not the business | | | | | | | |
| 40 | is regularly carried on | | | | | | | |
| 10 | Other income. Do not include gain or | | | | | | | |
| | loss from the sale of capital assets | | | | | | | |
| 11 | (Explain in Part VI.) | | | | | | 11 101 426 | |
| 12 | Gross receipts from related activities, etc | (coo instruction | l vne) | | | 12 | 11,101,436 | |
| 13 | First 5 years. If the Form 990 is for the o | | | | | | ~)(3) | |
| 13 | organization, check this box and stop he | | | | | | | |
| Section | on C. Computation of Public Suppo | | | | | | · · · · · · · | |
| 14 | Public support percentage for 2023 (line | | | 11 column (f)) | | 14 | 99.02 % | |
| 15 | Public support percentage from 2022 Sch | | | | | 15 | 99.49 % | |
| 16a | | | | | | | | |
| | 33 1/3% support test - 2023. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization | | | | | | | |
| b | 33 1/3% support test - 2022. If the organ | • | | • | | | _ | |
| | this box and stop here. The organization | | | | | | | |
| 17a | 10%-facts-and-circumstances test - 20 | • | | - | | | | |
| | 10% or more, and if the organization mee | - | | | | | | |
| | Part VI how the organization meets the fa | | | | | - | | |
| | organization | | | - | = | | | |
| b | 10%-facts-and-circumstances test - 20 | | | | | | _ | |
| | 15 is 10% or more, and if the organization | - | | | | | | |
| | in Part VI how the organization meets the | | | | | - | - | |
| | organization | | | _ | - | | | |
| 18 | Private foundation. If the organization d | | | | | | | |
| | instructions | | <u> </u> | <u></u> | | | | |

EEA Schedule A (Form 990) 2023

20-0205035

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

| Secti | on A. Public Support | | | | Ţ | | |
|-------|---|------------------------|-----------------------|-------------------|-------------------|-----------------|-------------|
| Calen | dar year (or fiscal year beginning in) | (a) 2019 | (b) 2020 | (c) 2021 | (d) 2022 | (e) 2023 | (f) Total |
| 1 | Gifts, grants, contributions, and membership fees | | | | | | |
| | received. (Do not include any "unusual grants.") | | | | | | |
| 2 | Gross receipts from admissions, merchandise sold or services performed, or facilities fumished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 | Gross receipts from activities that are not an | | | | | | |
| | unrelated trade or business under section 513 | | | | | | |
| 4 | Tax revenues levied for the | | | | | | |
| | organization's benefit and either paid | | | | | | |
| | to or expended on its behalf | | | | | | |
| 5 | The value of services or facilities | | | | | | |
| | furnished by a governmental unit to the | | | | | | |
| | organization without charge | | | | | | |
| 6 | Total. Add lines 1 through 5 | | | | | | |
| 7a | Amounts included on lines 1, 2, and 3 | | | | | | |
| | received from disqualified persons | | | | | | |
| b | Amounts included on lines 2 and 3 | | | | | | |
| | received from other than disqualified | | | | | | |
| | persons that exceed the greater of \$5,000 | | | | | | |
| | or 1% of the amount on line 13 for the year | | | | | | |
| С | Add lines 7a and 7b | | | | | | |
| 8 | Public support. (Subtract line 7c from | | | | | | |
| | line 6.) | | | | | | |
| | on B. Total Support | | | | | | |
| Calen | dar year (or fiscal year beginning in) | (a) 2019 | (b) 2020 | (c) 2021 | (d) 2022 | (e) 2023 | (f) Total |
| 9 | Amounts from line 6 | | | | | | |
| 10a | Gross income from interest, dividends, | | | | | | |
| | payments received on securities loans, rents, | | | | | | |
| | royalties, and income from similar sources . | | | | | | |
| b | Unrelated business taxable income (less | | | | | | |
| | section 511 taxes) from businesses | | | | | | |
| | acquired after June 30, 1975 | | | | | | |
| С | Add lines 10a and 10b | | | | | | |
| 11 | Net income from unrelated business | | | | | | |
| | activities not included on line 10b, whether | | | | | | |
| | or not the business is regularly carried on | | | | | | |
| 12 | Other income. Do not include gain or | | | | | | |
| | loss from the sale of capital assets | | | | | | |
| | (Explain in Part VI.) | | | | | | |
| 13 | Total support. (Add lines 9, 10c, 11, | | | | | | |
| | and 12.) | | | | | | |
| 14 | First 5 years. If the Form 990 is for the or | ganization's fir | rst, second, thi | rd, fourth, or fi | fth tax year as | a section 501(c | :)(3) |
| | organization, check this box and stop her | e | | | | | |
| Secti | on C. Computation of Public Suppor | t Percentag | е | | | | |
| 15 | Public support percentage for 2023 (line 8 | | - | 13, column (f)) | | 15 | % |
| 16 | Public support percentage from 2022 Sch | | | | | 16 | <u>%</u> |
| Secti | on D. Computation of Investment Inc | come Perce | ntage | | | | |
| 17 | Investment income percentage for 2023 (I | ine 10c, colum | nn (f), divided b | y line 13, colu | mn (f)) | 17 | % |
| 18 | Investment income percentage from 2022 | | | | | 18 | % |
| 19a | 33 1/3% support tests - 2023. If the orga | nization did no | ot check the bo | x on line 14, a | nd line 15 is mo | ore than 33 1/3 | %, and line |
| | 17 is not more than 33 1/3%, check this be | ox and stop h | ere. The orgar | nization qualifie | es as a publicly | supported orga | anization 🗌 |
| b | 33 1/3% support tests - 2022. If the organizati | on did not checl | k a box on line 1 | 4 or line 19a, an | d line 16 is more | than 33 1/3%, a | nd |
| | line 18 is not more than 33 1/3%, check this bo | x and stop here | . The organizati | on qualifies as a | publicly supporte | ed organization | |
| 20 | Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions | | | | | | |

Part IV **Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

| Section A. All Supporting Organization | Section | A. All | Supporting | Organizations |
|--|---------|--------|------------|---------------|
|--|---------|--------|------------|---------------|

| ecti | on A. All Supporting Organizations | | | |
|------|---|------|-----|----|
| | | | Yes | No |
| 1 | Are all of the organization's supported organizations listed by name in the organization's governing | | | |
| | documents? If "No," describe in Part VI how the supported organizations are designated. If designated by | | | |
| | class or purpose, describe the designation. If historic and continuing relationship, explain. | 1 | | |
| 2 | Did the organization have any supported organization that does not have an IRS determination of status | | | |
| | under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported | | | |
| | organization was described in section 509(a)(1) or (2). | 2 | | |
| 3a | Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer | | | |
| | lines 3b and 3c below. | 3a | | |
| b | Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and | | | |
| | satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the | | | |
| | organization made the determination. | 3b | | |
| С | Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) | | | |
| | purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use. | 3с | | |
| 4a | Was any supported organization not organized in the United States ("foreign supported organization")? If | | | |
| | "Yes," and if you checked 12a or 12b in Part I, answer lines 4b and 4c below. | 4a | | |
| b | Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign | | | |
| | supported organization? If "Yes," describe in Part VI how the organization had such control and discretion | | | |
| | despite being controlled or supervised by or in connection with its supported organizations. | 4b | | |
| С | Did the organization support any foreign supported organization that does not have an IRS determination | | | |
| • | under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used | | | |
| | to ensure that all support to the foreign supported organization was used exclusively for section $170(c)(2)(B)$ | | | |
| | purposes. | 4c | | |
| 5a | Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," | | | |
| - | answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN | | | |
| | numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; | | | |
| | (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action | | | |
| | was accomplished (such as by amendment to the organizing document). | 5a | | |
| b | Type I or Type II only. Was any added or substituted supported organization part of a class already | - Ou | | |
| ~ | designated in the organization's organizing document? | 5b | | |
| С | Substitutions only. Was the substitution the result of an event beyond the organization's control? | 5c | | |
| 6 | Did the organization provide support (whether in the form of grants or the provision of services or facilities) to | | | |
| • | anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited | | | |
| | by one or more of its supported organizations, or (iii) other supporting organizations that also support or | | | |
| | benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i> | 6 | | |
| 7 | Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor | | | |
| • | (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity | | | |
| | with regard to a substantial contributor? <i>If</i> "Yes," <i>complete Part I of Schedule L (Form 990)</i> . | 7 | | |
| 8 | Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line | | | |
| • | 7? If "Yes," complete Part I of Schedule L (Form 990). | 8 | | |
| 9a | Was the organization controlled directly or indirectly at any time during the tax year by one or more | | | |
| Ju | disqualified persons, as defined in section 4946 (other than foundation managers and organizations | | | |
| | described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI . | 9a | | |
| b | Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which | Ja | | |
| b | the supporting organization had an interest? If "Yes," provide detail in Part VI . | 9b | | |
| ^ | Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit | JU | | |
| С | from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI . | 90 | | |
| ۱۸۰ | | 9с | | |
| I0a | Was the organization subject to the excess business holdings rules of section 4943 because of section | | | |
| | 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below. | 100 | | |
| h | Did the organization have any excess business holdings in the tax year? (Use Schedule C. Form 4720, to | 10a | | |
| | DIG THE VIGEOUS BUILDINGS BUY EAGES DUSINESS HORONGS IN THE LAX YEAR CHOSE SCHEIDIE G. FORM 477H TO | | | |

determine whether the organization had excess business holdings.)

| Part I | V Supporting Organizations (continued) | | | |
|---------|--|---------|--------|-------|
| | | | Yes | No |
| 11 | Has the organization accepted a gift or contribution from any of the following persons? | | | |
| а | A person who directly or indirectly controls, either alone or together with persons described on lines 11b and | | | |
| | 11c below, the governing body of a supported organization? | 11a | | |
| | A family member of a person described on line 11a above? | 11b | | |
| С | A 35% controlled entity of a person described on 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, | | | |
| | provide detail in Part VI. | 11c | | |
| Section | on B. Type I Supporting Organizations | | | |
| | | | Yes | No |
| 1 | Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or | | | |
| | more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, | | | |
| | directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) | | | |
| | effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported | | | |
| | organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the | | | |
| | supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. | 1 | | |
| 2 | Did the organization operate for the benefit of any supported organization other than the supported | | | |
| | organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part | | | |
| | VI how providing such benefit carried out the purposes of the supported organization(s) that operated, | _ | | |
| | supervised, or controlled the supporting organization. | 2 | | |
| Section | on C. Type II Supporting Organizations | | | |
| | | | Yes | No |
| 1 | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors | | | |
| | or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control | | | |
| | or management of the supporting organization was vested in the same persons that controlled or managed | _ | | |
| Casti | the supported organization(s). | 1 | | |
| Section | on D. All Type III Supporting Organizations | | V | NI - |
| 4 | | | Yes | No |
| 1 | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the | | | |
| | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax | | | |
| | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the | 4 | | |
| 2 | organization's governing documents in effect on the date of notification, to the extent not previously provided? Were any of the organization's officers directors or trustees either (i) appointed or elected by the supported | 1 | | |
| 2 | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI</i> | | | |
| | how the organization maintained a close and continuous working relationship with the supported organization(s). | 2 | | |
| 3 | By reason of the relationship described in line 2, above, did the organization's supported organizations have | | | |
| 3 | a significant voice in the organization's investment policies and in directing the use of the organization's | | | |
| | income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's | | | |
| | supported organizations played in this regard. | 3 | | |
| Section | on E. Type III Functionally Integrated Supporting Organizations | | | |
| 1 | Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see | inst | ructio | ons). |
| a | The organization satisfied the Activities Test. <i>Complete line 2 below.</i> | , ,,,,, | | |
| b | The organization is the parent of each of its supported organizations. <i>Complete line 3 below.</i> | | | |
| С | The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instruc | ctions) | | |
| 2 | Activities Test. Answer lines 2a and 2b below. | , | Yes | No |
| а | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of | | | |
| | the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify | | | |
| | those supported organizations and explain how these activities directly furthered their exempt purposes, | | | |
| | how the organization was responsive to those supported organizations, and how the organization determined | | | |
| | that these activities constituted substantially all of its activities. | 2a | | |
| b | Did the activities described on line 2a, above, constitute activities that, but for the organization's | | | |
| | involvement, one or more of the organization's supported organization(s) would have been engaged in? If | | | |
| | "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would | | | |
| | have engaged in these activities but for the organization's involvement. | 2b | | |
| 3 | Parent of Supported Organizations. Answer lines 3a and 3b below. | | | |
| а | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or | | | |
| | trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI. | 3a | | |
| b | Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each | | | |
| | of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard. | 3b | | |

| //). See gh E. rent Year ional) |
|--|
| gh E. rent Year |
| ent Year |
| |
| ional) |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| ent Year |
| ional) |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| nt Year |
| |
| |
| |
| |
| |
| <u></u> |

Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization 7 (see instructions).

Distributable Amount. Subtract line 5 from line 4, unless subject to

emergency temporary reduction (see instructions).

Schedule A (Form 990) 2023 EEA

6

| Part | Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued) | | | | | | | |
|---|--|---------------------------|----------|----|-------|--|--|--|
| Sect | | Current Year | | | | | | |
| 1 | Amounts paid to supported organizations to accomplish e | xempt purposes | | 1 | | | | |
| 2 | Amounts paid to perform activity that directly furthers exer | mpt purposes of support | ed | | | | | |
| | organizations, in excess of income from activity | | | 2 | | | | |
| 3 | Administrative expenses paid to accomplish exempt purpo | oses of supported organ | izations | 3 | | | | |
| 4 Amounts paid to acquire exempt-use assets | | | | 4 | | | | |
| 5 | Qualified set-aside amounts (prior IRS approval required) | - provide details in Part | VI) | 5 | | | | |
| 6 | Other distributions (describe in Part VI). See instructions. | | | 6 | | | | |
| 7 | Total annual distributions. Add lines 1 through 6. | | | 7 | | | | |
| 8 | Distributions to attentive supported organizations to which | the organization is resp | onsive | | | | | |
| | (provide details in Part VI). See instructions. | | | 8 | | | | |
| 9 | Distributable amount for 2023 from Section C, line 6 | | | 9 | | | | |
| 10 | Line 8 amount divided by line 9 amount | | 1 | 10 | | | | |
| | | | (ii) | | (iii) | | | |

| 10 | Line o amount divided by line 9 amount | | 10 | |
|------|--|-----------------------------|--|---|
| Sect | ion E - Distribution Allocations (see instructions) | (i) Excess Distributions | (ii) Underdistributions Pre-2023 | (iii) Distributable Amount for 2023 |
| 1 | Distributable amount for 2023 from Section C, line 6 | | | |
| 2 | Underdistributions, if any, for years prior to 2023 | | | |
| | (reasonable cause required - explain in Part VI). See | | | |
| | instructions. | | | |
| 3 | Excess distributions carryover, if any, to 2023 | | | |
| а | From 2018 | | | |
| b | From 2019 | | | |
| С | From 2020 | | | |
| d | From 2021 | | | |
| е | From 2022 | | | |
| f | Total of lines 3a through 3e | | | |
| g | Applied to underdistributions of prior years | | | |
| h | Applied to 2023 distributable amount | | | |
| i | Carryover from 2018 not applied (see instructions) | | | |
| j | Remainder. Subtract lines 3g, 3h, and 3i from line 3f. | | | |
| 4 | Distributions for 2023 from | | | |
| | Section D, line 7: \$ | | | |
| а | Applied to underdistributions of prior years | | | |
| b | Applied to 2023 distributable amount | | | |
| С | Remainder. Subtract lines 4a and 4b from line 4. | | | |
| 5 | Remaining underdistributions for years prior to 2023, if | | | |
| | any. Subtract lines 3g and 4a from line 2. For result | | | |
| | greater than zero, explain in Part VI. See instructions. | | | |
| 6 | Remaining underdistributions for 2023. Subtract lines 3h | | | |
| | and 4b from line 1. For result greater than zero, explain in | | | |
| | Part VI. See instructions. | | | |
| 7 | Excess distributions carryover to 2024. Add lines 3j | | | |
| | and 4c. | | | |
| 8 | Breakdown of line 7: | | | |
| а | Excess from 2019 | | | |
| b | Excess from 2020 | | | |
| С | Excess from 2021 | | | |
| d | Excess from 2022 | | | |
| е | Excess from 2023 | | | |

EEA Schedule A (Form 990) 2023

Schedule A (Form 990) 2023 Part VI Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule B (Form 990)

Schedule of Contributors

Department of the Treasury Internal Revenue Service Name of the organization

Attach to Form 990, 990-EZ, or Form 990-PF. Go to www.irs.gov/Form990 for the latest information.

Employer identification number

OMB No. 1545-0047

Parkinson Research Foundation Inc 20-0205035 Organization type (check one): Filers of: Section: Form 990 or 990-EZ X 501(c)(3) (enter number) organization 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. General Rule For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions. **Special Rules** x For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II. For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III. For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

SCHEDULE D (Form 990)

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.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

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

Open to Public Inspection

Employer identification number

| a Total number of conservation easements. b Total acreage restricted by conservation easements c Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register 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? 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 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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 FASB 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 the following amounts relating to these items: i) Revenue included on Form 990, Part VII, line 1 ii) Assets included in Form 990, Part VII. | Complete if the organization answered "Yes" on Form 990, Part IV, line 6. Total number at end of year | Parki | nson Research Foundation Inc | 20-0 | 205035 | |
|--|---|-------|--|--------------|---------------------------|--------------|
| Total number at end of year . | Total number at end of year Aggregate value of prants from (during year) Aggregate value of contributions to (during year) Aggregate value of prants from (during year) Aggregate value of or grants from (during year) Aggregate value of grants from (during year) Aggregate value o | Par | t I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Acc | ounts | | |
| 1 Total number at end of year | 1 Total number at end of year | | Complete if the organization answered "Yes" on Form 990, Part IV, line 6. | | | |
| 2 Aggregate value of contributions to (during year) | 2 Aggregate value of contributions to (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 advisors in writing that the assets held in donor advisors in writing that the assets held in donor advisors in writing that the assets held in donor advisors in writing that the assets held in donor advisors in writing that the asset held in donor advisors in writing that the asset held in donor advisors in writing that grant funds can be used only for charactible purposes and not for the benefit? 6 Did the organization inform all grantees, chorus, and donor advisors in writing that grant funds can be used only for charactible purposes and not for the benefit? Part II Conservation Easements Complete if the organization answered "Yes" on Form 990, Part IV, line 7. 1 Purpose(o) to conservation assements held by the organization (check all that apply) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of the land (so the tax year All Industrial Indus | | (a) Donor advised funds | | (b) Funds and other accou | ints |
| 2 Aggregate value of contributions to (during year) | 2 Aggregate value of contributions to (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 advisors in writing that the assets held in donor advisors in writing that the assets held in donor advisors in writing that the assets held in donor advisors in writing that the assets held in donor advisors in writing that the asset held in donor advisors in writing that the asset held in donor advisors in writing that grant funds can be used only for charactible purposes and not for the benefit? 6 Did the organization inform all grantees, chorus, and donor advisors in writing that grant funds can be used only for charactible purposes and not for the benefit? Part II Conservation Easements Complete if the organization answered "Yes" on Form 990, Part IV, line 7. 1 Purpose(o) to conservation assements held by the organization (check all that apply) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of the land (so the tax year All Industrial Indus | 1 | Total number at end of year | | | |
| A Aggregate value at end of year Did the organization inform all donors advisors in writing that the assets held in donor advised funds are the organization inform all grantees, donors, and donor advisors in writing that the assets held in donor advisors of 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? Part II | A Aggregate value at end of year | 2 | | | | |
| A Aggregate value at end of year Did the organization inform all donors advisors in writing that the assets held in donor advised funds are the organization inform all grantees, donors, and donor advisors in writing that the assets held in donor advisors of 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? Part II | A Aggregate value at end of year | 3 | Aggregate value of grants from (during year) | | | |
| Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? Yes No No 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 No No No No No No N | 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 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 Organization in any private benefit? Yes No Organization answered "Yes" on Form 990, Part IV, line 7. 1 Purpose(5) of conservation easements held by the organization (check all that apply). Preservation of land for public use (for example, recreation or education) Preservation of a natural habitat Preservation of natural habitat Preservation of natural habitat Preservation of open space Complete line 2 at through 2 dif 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 acreage restricted by conservation easements 2a Very the Conservation easements Very the Conservation easements Very the Conservation easements Very the Conservation easements included on line 2a Very the Conservation easements in located Very the Conservation easements in the locate Very the Conservation easements in located Very the Conservation easements | 4 | | | | |
| tunds are the organization's property, subject to the organization's exclusive legal control? | funds are 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 advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Conservation Easements | 5 | | | | |
| 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? 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 (for example, recreation or education) Preservation of a historically important land area Preservation of parts passed. 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. a Total number of conservation easements. 2 Total number of conservation easements. 3 Number of conservation easements on a certified historic structure included on line 2a. 4 Number of conservation easements included on line 2a, acquired after July 25, 2006, and not on a historic structure included on line 2a, acquired after July 25, 2006, and not on a historic structure asements modified, transferred, released, extinguished, or terminated by the organization during the tax year. 4 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? 6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcement of the conservation easements in the sevenue and expense statement and balance sheet works of an expense sincurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year of parts title the organization answered "Yes" on Form 990, Pa | 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 inpermisable private benefit? 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 (for example, recreation or education) Preservation of a historically important land area Preservation of open space Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year. a Total number of conservation easements. | | | | | □No |
| only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Conservation Easements | only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? | 6 | | | | |
| conferring impermissible private benefit? | Part II Conservation Easements | | | | | |
| Conservation Easements Complete if the organization answered "Yes" on Form 990, Part IV, line 7. Pupose(s) of conservation easements held by the organization (check all that apply). Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Protection of natural habitat Protection of natural habitat Preservation of open space Complete lines 2s 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. Total number of conservation easements 2a Protection of conservation easements 2b Protection of conservation easements 2b Protection of conservation easements 2c Protection of conservation easements 2d Protection of conservation easements 2d Protection Protect | Conservation Easements Complete if the organization answered "Yes" on Form 990, Part IV, line 7. Purpose(s) of conservation easements held by the organization (check all that apply). Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a certified historic structure Preservation of land for public use (for example, recreation or education) Preservation of a certified historic structure Preservation of pen space Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year. a Total number of conservation easements | | | | | □No |
| 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 (for example, recreation or education) Preservation of a historically important land area Protection of natural habitat Protection of natural habitat Preservation of and for public use (for example, recreation or education) Preservation of a certified historic structure Preservation of open space Complete lines 2 at through 2 of if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year. a Total number of conservation easements. b Total acreage restricted by conservation easements 2b | Complete if the organization answered "Yes" on Form 990, Part IV, line 7. 1 Purpose(s) of corservation easements held by the organization (check all that apply). Preservation of land for public use (for example, recreation or education) Preservation of a chistorically important land area Protection of natural habitat Preservation of open space 2 Complete lines 2a through 2d if the organization held a qualified conservation in the form of a conservation easement on the last day of the tax year. a Total number of conservation easements. | Part | | | | |
| Purpose(s) of conservation easements held by the organization (check all that apply). | Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of open space 2 Complete lines 2 at 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. | | | | | |
| Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Preservation of or natural habitat Preservation of a certified historic structure Preservation of a certified historic structure Preservation or a certified historic structure included on in the form of a conservation easements in the last day of the tax year. Total aumber of conservation easements Preservation | Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area Protection of natural habitat 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. Reld at the End of the Tax Year 3 Total number of conservation easements 2a 2b | 1 | | | | |
| Protection of natural habitat Preservation of a certified historic structure Preservation of open space Preservation easement on the last day of the tax year. Preservation of open space Preservation of open space Preservation of open space Preservation of open space Preservation open space P | Protection of natural habitat Preservation of open space | • | <u> </u> | istorically | mnortant land area | |
| 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. a Total number of conservation easements. b Total acreage restricted by conservation easements. 2 Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register 3 Number of conservation easements medified, 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? Amount of expenses incurred in 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 2d 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 Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASS ASC 958, not 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 furt | Preservation of open space Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year. Total number of conservation easements 2a | | | - | | |
| 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. Total number of conservation easements. C Number of conservation easements on a certified historic structure included on line 2a D Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year sheet, and include, if applicable, the text of the footnote to the organization financial statement and balance sheet, and include, if applicable, the text of the footnote to the organization's infinancial statements that describes the organization's accounting for conservation easements Part III Organization Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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 the following amounts relating to these items: (i) Revenue included on Form 99 | 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. Total number of conservation easements | | _ | oranoa me | | |
| easement on the last day of the tax year. a Total number of conservation easements. b Total acreage restricted by conservation easements c Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register 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? 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 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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 Complete if the organization answered "Yes" on Form 990, Part IV, line 8. 1a If the organization elected, as permitted under FASB 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 the following amounts relating to these items: b If the organization elected, as permitted under FASB 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 rela | easement on the last day of the tax year. a Total number of conservation easements. b Total acreage restricted by conservation easements. c Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement is located Soes the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? National enforcement of the conservation easements in holds? Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Part III oses each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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 propriation and propriation easements Complete if the organization easements Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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 o | 2 | - | conservat | ion | |
| a Total number of conservation easements. b Total acreage restricted by conservation easements c Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register 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? 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 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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 FASB 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 the following amounts relating to these items: i) Revenue included on Form 990, Part VII, line 1 ii) Assets included in Form 990, Part VII. | a Total number of conservation easements. b Total acreage restricted by conservation easements Number of conservation easements on a certified historic structure included on line 2a c Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement is located bees the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year notes and the properties of the conservation easements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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 Organization's accounting for conservation easements Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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 it | _ | | CONSCIVAL | | he Tay Vear |
| b Total acreage restricted by conservation easements c Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i)) and section 170(h)(4)(B)(ii)? 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 Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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 FASB 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 r | b Total acreage restricted by conservation easements c Number of conservation easements on a certified historic structure included on line 2a d Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register 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? 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 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? 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 FASB 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 FASB ASC 958, to report in its revenue statement a | 9 | • | 22 | Tield at the Lind of t | ilo Tax Toul |
| c Number of conservation easements on a certified historic structure included on line 2a 2c | c Number of conservation easements on a certified historic structure included on line 2a 2d | _ | | | | |
| Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? No Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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. It the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 pub | Number of conservation easements included on line 2c, acquired after July 25, 2006, and not on a historic structure listed in the National Register | | | | | |
| on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement is located Soes the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcing conservation easements during the year who of staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public ex | on a historic structure listed in the National Register Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? No Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 | | | . 20 | | |
| Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located | Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement is located Number of states where property subject to conservation easements in socated Number of states where property subject to conservation easement is located Number of states where property subject to conservation easement in spection, inspection, inspection, inspection, inspection, inspection, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year No Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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, prov | u | | 24 | | |
| A Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? I 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. If the organization elected, as permitted under FASB 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 FASB 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 X | tax year | 2 | • | | during the | |
| Number of states where property subject to conservation easement is located Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? No Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 VIII, line 1 | Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? | 3 | | yarıızatıorı | duling the | |
| Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 | Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 . 1 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 FASB ASC 958 relating to the | 1 | · —————— | | | |
| violations, and enforcement of the conservation easements it holds? | violations, and enforcement of the conservation easements it holds? Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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. In the organization elected, as permitted under FASB 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. In the organization elected, as permitted under FASB 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: Revenue included on Form 990, Part VIII, line 1 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 FASB ASC 958 relating to these items: Revenue included on Form 990, Part VIII, line 1 Revenue included on Form 990, Part VIII, line 1 | | | | | |
| Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? 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. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 X III, line 1 \$ (ii) Assets included in Form 990, Part X III. | Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? | J | | | □ Vos | □No |
| Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? | Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)? | 6 | · | | _ | ш - |
| B Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? | Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 FASB ASC 958 relating to these items: Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 | Ū | otali and volunted flouis devoted to monitoring, inspecting, naridining of violations, and emoting conserve | illori casci | nons during the year | |
| B Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(ii)? | Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 FASB ASC 958 relating to these items: Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 | 7 | Amount of expenses incurred in monitoring inspecting handling of violations, and enforcing conservation | easement | s during the year | |
| and section 170(h)(4)(B)(ii)? | and section 170(h)(4)(B)(ii)? | • | 7 into an of expenses into another in the intering, inspecting, narraining of violations, and emissioning economical and | odoomon | o daming the year | |
| and section 170(h)(4)(B)(ii)? | and section 170(h)(4)(B)(ii)? | 8 | Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4) | I)(B)(i) | | |
| 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 FASB 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 FASB 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 | 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. If the organization elected, as permitted under FASB 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. If the organization elected, as permitted under FASB 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 X | | | | | □No |
| 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 FASB 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 FASB 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 | 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 FASB 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 FASB 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 | 9 | | | | |
| 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 FASB 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 FASB 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 | Part III Organization's accounting for conservation easements Complete if the organization answered "Yes" on Form 990, Part IV, line 8. Ia If the organization elected, as permitted under FASB 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 FASB 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 FASB ASC 958 relating to these items: a Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part | | | | | |
| 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 FASB 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 FASB 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 | 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 FASB 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 FASB 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 FASB ASC 958 relating to these items: a Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line 1 \$ Revenue included on Form 990, Part VIII, line | | | | | |
| Complete if the organization answered "Yes" on Form 990, Part IV, line 8. 1a If the organization elected, as permitted under FASB 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 FASB 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 | Complete if the organization answered "Yes" on Form 990, Part IV, line 8. 1a If the organization elected, as permitted under FASB 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 FASB 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 | Part | <u> </u> | ther Sin | nilar Assets | |
| 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 FASB 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 | 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 FASB 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 | | | | | |
| 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 FASB 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 | 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 FASB 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 | 1a | If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and | balance s | neet works | |
| service, provide in Part XIII the text of the footnote to its financial statements that describes these items. If the organization elected, as permitted under FASB 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 | service, provide in Part XIII the text of the footnote to its financial statements that describes these items. If the organization elected, as permitted under FASB 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 | | | | | |
| b If the organization elected, as permitted under FASB 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 | b If the organization elected, as permitted under FASB 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 | | • | | | |
| 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 | 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 | b | If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and bala | ance sheet | works of | |
| provide the following amounts relating to these items: (i) Revenue included on Form 990, Part VIII, line 1 | provide the following amounts relating to these items: (i) Revenue included on Form 990, Part VIII, line 1 | | | | | |
| (i) Revenue included on Form 990, Part VIII, line 1 \$ (ii) Assets included in Form 990, Part X \$ | (i) Revenue included on Form 990, Part VIII, line 1 | | | | • | |
| (ii) Assets included in Form 990, Part X | (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 | 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 FASB ASC 958 relating to these items: Revenue included on Form 990, Part VIII, line 1 | | | | | |
| | following amounts required to be reported under FASB ASC 958 relating to these items: a Revenue included on Form 990, Part VIII, line 1 | 2 | | | e the | |
| | a Revenue included on Form 990, Part VIII, line 1 | • | | ,, | - | |
| | | а | | | . \$ | |
| | D ASSEIS INCIDIDED IN FORM 990, Part X | b | Assets included in Form 990, Part X | | | |

| Par | t III Organizations Maintaining Co | ollections of A | rt, Historic | cal Treasures | or Other S | Similar Asse | ets (cc | ntinu | ıed) |
|-------|---|-----------------------|------------------|----------------------|-----------------|----------------|----------|------------|------|
| 3 | Using the organization's acquisition, accession, | and other records, | check any of | the following that r | nake significar | nt use of its | | | |
| | collection items (check all that apply): | | | | | | | | |
| а | ☐ Public exhibition | | d 🗌 Lo | oan or exchange p | rogram | | | | |
| b | Scholarly research | | e 🗌 O | ther | | | | | |
| С | Preservation for future generations | | | | | | | | |
| 4 | Provide a description of the organization's colle | ections and explain | how they furth | er the organization | n's exempt pur | pose in Part | | | |
| | XIII. | | | | | | | | |
| 5 | During the year, did the organization solicit or re | eceive donations of | art, historical | treasures, or other | similar | | | | |
| | assets to be sold to raise funds rather than to b | | | | | | Yes | ; | No |
| Par | t IV Escrow and Custodial Arrang | | • | | | | | | |
| | Complete if the organization an | swered "Yes" o | on Form 99 | 0, Part IV, line | 9, or repor | ted an amou | ınt on | Form | ı |
| | 990, Part X, line 21. | | | | • | | | | |
| 1a | Is the organization an agent, trustee, custodian | or other intermedia | ry for contribut | tions or other asse | ts not | | | | |
| | included on Form 990, Part X? | | - | | | | Yes | ; | No |
| b | If "Yes," explain the arrangement in Part XIII an | | | | | | _ | | |
| | • | · | | | | Amour | nt | | |
| С | Beginning balance | | | | . 1c | | | | |
| d | Additions during the year | | | | | | - | | |
| е | Distributions during the year | | | | | | - | | |
| f | Ending balance | | | | . 1f | | | | |
| 2a | Did the organization include an amount on Form | n 990, Part X, line 2 | 21, for escrow | or custodial accou | nt liability? . | | Yes | ; [] | No |
| b | If "Yes," explain the arrangement in Part XIII. C | heck here if the exp | planation has I | oeen provided on l | Part XIII | | | . 🔲 | |
| Par | | | | | | | | | |
| | Complete if the organization an | swered "Yes" o | on Form 99 | 0, Part IV, line | 10. | | | | |
| | | (a) Current year | (b) Prior year | (c) Two years | back (d) Th | ree years back | (e) Four | years b | ack |
| 1a | Beginning of year balance | | | | | | | | |
| b | Contributions | | | | | | | | |
| С | Net investment earnings, gains, and | | | | | | | | |
| | losses | | | | | | | | |
| d | Grants or scholarships | | | | | | | | |
| е | Other expenditures for facilities and | | | | | | | | |
| | programs | | | | | | | | |
| f | Administrative expenses | | | | | | | | |
| g | End of year balance | | | | | | | | |
| 2 | Provide the estimated percentage of the current | t year end balance | (line 1g, colun | nn (a)) held as: | | | | | |
| а | Board designated or quasi-endowment | % | | | | | | | |
| b | Permanent endowment % | | | | | | | | |
| С | Term endowment % | | | | | | | | |
| | The percentages on lines 2a, 2b, and 2c should | equal 100%. | | | | | | | |
| 3a | Are there endowment funds not in the possessi | ion of the organizat | ion that are he | eld and administere | ed 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 organization | ons listed as require | ed on Schedu | le R? | | | 3b | | |
| 4 | Describe in Part XIII the intended uses of the o | rganization's endov | wment funds. | | | | | | |
| Par | t VI Land, Buildings, and Equipme | ent | | | | | | | |
| | Complete if the organization an | | on Form 99 | 0, Part IV, line | 11a. See F | orm 990, Pa | art X, I | ine 1 | 0. |
| | Description of property | (a) Cost or other | | Cost or other basis | (c) Accumu | | (d) Book | | |
| | | (investment |) | (other) | depreciat | on | | | |
| 1a | Land | | | | | | | | |
| b | Buildings | | | | | | | | |
| С | Leasehold improvements | | | 48,169 | 4 | 6,915 | | 1,2 | 254 |
| d | Equipment | | | 140,026 | | 1,439 | | | 587 |
| е | Other | | | | | | | | |
| Total | Add lines 1a through 1e (Column (d) must equ | al Form 000 Part | X line 10c co | dumn (R) | | | | a s | 241 |

| Schedule D (Fo | orm 990) 2023 Parkinson Research Fo | undation Inc | 20-0205035 Pa |
|----------------|---|------------------------------|---|
| Part VII | Investments - Other Securities | | |
| | Complete if the organization answered "Yes | on Form 990, Part IV, line | 11b. See Form 990, Part X, line 1: |
| | (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-h | neld equity interests | | |
| (3) Other | | | |
| (A) | | | |
| (B) | | | |
| (C) | | | |
| (D) | | | |
| (E) | | | |
| (F) | | | |
| (G) | | | |
| (H) | one (b) and a small Forms (COC, Port V, line 40, and (D)) | | |
| Part VIII | mn (b) must equal Form 990, Part X, line 12, col.(B)) Investments - Program Related | | |
| rait VIII | Complete if the organization answered "Yes | " on Form 990. Part IV. line | 11c. See Form 990. Part X. line 1: |
| | (a) Description of investment | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
| (1) | | | Cost of end-of-year market value |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| Total. (Colur | mn (b) must equal Form 990, Part X, line 13, col. (B)) | | |
| Part IX | Other Assets Complete if the organization answered "Yes | on Form 990, Part IV, line | 11d. See Form 990, Part X, line 1 |
| | (a) Description | | (b) Book value |
| (1) | | | |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| <u>(7)</u> | | | |
| (8) | | | |
| (9) | ma /h) must squal Form 000 Port V line 45 cal /D)) | | |
| Part X | mn (b) must equal Form 990, Part X, line 15 col. (B)) Other Liabilities | | • • • • • • |
| Tartx | Complete if the organization answered "Yes line 25. | on Form 990, Part IV, line | 11e or 11f. See Form 990, Part X, |
| 1. | (a) Description of liability | (b) Book value | |
| - | Lincome taxes | | |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| (7) | | | |

(8) (9) Total. (Column (b) must equal Form 990, Part X, line 25 col. (B)) . .

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 FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII.

| | e D (Form 990) 2023 Parkinson Research Foundation Inc | | | 0-020 | |
|--------|--|--------|---------------------|-----------|-------------------|
| Part | | | | Retur | n |
| | Complete if the organization answered "Yes" on Form 990, P | art I\ | /, line 12a. | | |
| 1 | Total revenue, gains, and other support per audited financial statements | | | 1 | 2,492,980 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12: | | | | |
| а | Net unrealized gains (losses) on investments | 2a | 94,665 | | |
| b | Donated services and use of facilities | 2b | | | |
| С | Recoveries of prior year grants | 2c | | | |
| d | Other (Describe in Part XIII.) | 2d | | | |
| е | Add lines 2a through 2d | | | 2e | 94,665 |
| 3 | Subtract line 2e from line 1 | | | 3 | 2,398,315 |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1: | | | | |
| а | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | | |
| b | Other (Describe in Part XIII.) | 4b | | | |
| С | Add lines 4a and 4b | | | 4c | |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.). | | | 5 | 2,398,315 |
| Part | | | | _ | |
| · uit | Complete if the organization answered "Yes" on Form 990, P | | | J. 1101 | ui ii |
| 1 | Total expenses and losses per audited financial statements | | | 1 | 2,227,155 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25: | | | • | 2,221,133 |
| a | Donated services and use of facilities | 2a | | | |
| a b | Prior year adjustments | 2b | | - | |
| | • | 2C | | - | |
| C | Other (Describe in Port VIII.) | 2d | | - | |
| d | Other (Describe in Part XIII.) | | | - | |
| e | Add lines 2a through 2d | | | 2e | |
| 3 | Subtract line 2e from line 1 | | | 3 | 2,227,155 |
| 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 | | - | |
| b | Other (Describe in Part XIII.) | 4b | | | |
| C | Add lines 4a and 4b | | | 4c | |
| _5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.). | | | 5 | 2,227,155 |
| Part | | | | | |
| | e the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, I | | | Part X, I | ine |
| | XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide ar | | tional information. | | |
| 01. E | ootnote for uncertain tax position under FIN 48 (Part | X) | | | |
| | | | | | |
| Manag | ment has evaluated the effect of an accounting standa | rd r | elating to accor | untin | g for uncertaint |
| | | | | | |
| in ir | come taxes. Management has determined that the Organiz | atio | n had no uncerta | ain i | ncome tax |
| | | | | | |
| posit | ions that could have a significant effect on the conso | lida | ted financial st | tatem | ents for the year |
| | | | | | |
| ended | December 31, 2023. The Organization's federal income | tax | returns for fise | cal y | ears ended |
| | | | | | |
| Decen | ber 31, 2022, 2021 and 2020 are subject to examination | by | the Internal Rev | venue | Service |
| | | | | | |
| gener | ally for three years after the federal income tax retu | ırns | were filed. | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

SCHEDULE G (Form 990)

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

Employer identification number

Open to Public Inspection

| ark: | inson Research Foundation | | | | | 20-0205 | |
|-------|---|------------------------|---------------|--------------------------------------|-----------------------------------|--|---|
| Part | Fundraising Activities Form 990-EZ filers are | | | | vered "Yes" on F | Form 990, Part IV, I | ine 17. |
| 1 | Indicate whether the organization rai | | | | ties. Check all that a | oply. | |
| а | x Mail solicitations | | еГ | _ | of non-government | | |
| b | x Internet and email solicitations | | f [| | of government grant | | |
| C | Phone solicitations | | a [| | draising events | | |
| d | In-person solicitations | | y L | _ Special luli | idiaising events | | |
| | - · | or aral agraement wi | th and indivi | امريادا المماريط | a officere directore | trustana | |
| 2a | Did the organization have a written of | - | - | | - | | □ v □ v. |
| | or key employees listed in Form 990 | | | | | | x Yes No |
| b | If "Yes," list the 10 highest paid indiv | | ndraisers) p | oursuant to ag | reements under whi | ch the fundraiser is to be | 9 |
| | compensated at least \$5,000 by the | organization. | | | | | |
| | | | ı | | T | | T |
| | (i) Name and address of individual or entity (fundraiser) | (ii) Activity | custody o | ndraiser have or control of butions? | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in | (vi) Amount paid to (or retained by) organization |
| | | | Yes | No | | col. (i) | 1 |
| 1Di | rectMail.com | Direct Mail | | | | | |
| | | Consulting | | х | 2,141,764 | 30,000 | 2,111,764 |
| 2 | | | | | | | |
| 3 | | | | | | | |
| _ | | | | | | | |
| 4 | | | | | | | |
| • | | | | | | | |
| 5 | | | | | | | |
| | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |
| 8 | | | | | | | |
| _ | | | | | | | |
| 9 | | | | | | | |
| 10 | | | | | | | |
| | | | | | | | |
| | | | | | | 30,000 | 2,111,764 |
| 3 | List all states in which the organizati | on is registered or li | censed to s | Olicit Contribu | tions or has been no | tilled it is exempt from | |
| | registration or licensing. | | | | | | |
| 111 : | States | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Part II

Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more

than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000. (a) Event #1 (b) Event #2 (c) Other events (d) Total events (add col. (a) through col. (c)) (total number) (event type) (event type) Revenue Gross receipts 1 2 Less: Contributions 3 Gross income (line 1 minus line 2) 4 Cash prizes . 5 Noncash prizes 6 Rent/facility costs Direct Expenses Food and beverages 8 Entertainment 9 Other direct expenses 10 11 Net income summary. Subtract line 10 from line 3, column (d) Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a. (b) Pull tabs/instant (d) Total gaming (add (a) Bingo (c) Other gaming Revenue bingo/progressive bingo col. (a) through col. (c)) Gross revenue 2 Cash prizes Direct Expenses 3 Noncash prizes Rent/facility costs 5 Other direct expenses 6 Volunteer labor 7 8 9 Enter the state(s) in which the organization conducts gaming activities: If "No," explain: Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? 10a If "Yes," explain:

EEA Schedule G (Form 990) 2023

| Schedu | ıle G (Form 99 | 0) 2023 | Parkinson Resea | arch Foundation Inc | 20-0 | 205035 | | Pa | ge 3 |
|--------|----------------|------------------------|---|--|----------|-----------|--------|-----|-------------|
| 11 | Does the c | rganization conduct o | | nmembers? | | | Yes | | No |
| 12 | Is the orga | nization a grantor, be | eneficiary or trustee of a t | rust, or a member of a partnership or other entity | | | | | |
| | formed to | administer charitable | gaming? | | | 🗌 | Yes | | No |
| 13 | Indicate th | e percentage of gami | ng activity conducted in: | | | | | | |
| а | The organi | zation's facility | | | | 13a | | | % |
| b | | • | | | | 13b | | | % |
| 14 | Enter the r | ame and address of | the person who prepares | s the organization's gaming/special events books and | | | | | |
| | records: | | | | | | | | |
| | Name | | | | | | | | |
| | Address | | | | | | | | |
| 15a | Does the o | rganization have a co | ontract with a third party | from whom the organization receives gaming | | | | | |
| | revenue? | | | | | 🗌 | Yes | | No |
| b | If "Yes," er | nter the amount of ga | ming revenue received b | y the organization \$ and the | | | | | |
| | amount of | gaming revenue retai | ined by the third party | \$ | | | | | |
| С | If "Yes," er | nter name and addres | ss of the third party: | | | | | | |
| | Name | | | | | | | | |
| | | | | | | | | | |
| | Address | | | | | | | | |
| 16 | Gaming m | anager information: | | | | | | | |
| | Name | | | | | | | | |
| | | | | | | | | | |
| | Gaming m | anager compensatior | n \$ | _ | | | | | |
| | Description | of services provided | d | | | | | | |
| | Directo | r/officer | Employee | ☐ Independent contractor | | | | | |
| 17 | Mandatory | distributions: | | | | | | | |
| а | • | | ler state law to make cha | aritable distributions from the gaming proceeds to | | | | | |
| | retain the | state gaming license? | | | | 🗆 | Yes | | No |
| b | Enter the a | mount of distributions | s required under state lav | w to be distributed to other exempt organizations or | | | | | |
| | spent in the | e organization's own | exempt activities during | the tax year \$ | | | | | |
| Part | : IV Su | oplemental Info | rmation. Provide th | e explanations required by Part I, line 2b, c | olumns | (iii) and | (v); a | and | |
| | | | 10b, 15b, 15c, 16, a | and 17b, as applicable. Also provide any ad | ditional | informat | ion. | | |
| | See | instructions. | | | | | | | |
| 01. | Fundrais | er agreements | (Part I, line 2 | 2b(v)) | | | | | |
| Addi | tional P | ayments to Di: | rectMail.com | | | | | | |
| | | **** | | | | | | | |
| | ices & E | | | | | | | | |
| - | Rental | | ,555 ,734 | | | | | | |
| Pape | | | ,734 ,900 | | | | | | |
| Post | aye | 111 | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | | | | | |
| | | | | | | | | | |
| - | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

EEA Schedule G (Form 990) 2023

SCHEDULE I (Form 990)

Department of the Treasury

Internal Revenue Service Name of the organization

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.

OMB No. 1545-0047

2023

Open to Public Inspection

Employer identification number

| Parkinson Research Foundation | | | | | | 20-0205035 | |
|---|----------------|---------------------------------|-----------------------------|----------------------------------|-------------------------------|---------------------------------------|---------------------------------------|
| Part I General Information o | | | | | | | |
| 1 Does the organization maintain record | | | | | | | |
| the selection criteria used to award the | | | | | | | . X Yes N |
| 2 Describe in Part IV the organization's | | | | | • •• | "\' " - 00 | |
| Part II Grants and Other Assist | | _ | | • | • | "Yes" on Form 990 | 0, |
| Part IV, line 21, for any red | · 1 | | · · | | (f) Method of valuation | (.) 5 | (1) 5 |
| (a) Name and address of organization or government | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of noncash assistance | (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
| (1)Parkinson Place Inc | | | | | | | |
| 5969 Cattleridge Blvd. Suit | | | | | | | Operating |
| Sarasota FL 34232 | 84-1890153 | 501(c)(3) | 332,230 | | Cost | | Costs |
| (2) | | | | | | | |
| (3) | | | | | | | |
| | | | | | | | |
| (4) | | | | | | | |
| (5) | | | | | | | |
| - | | | | | | | |
| (6) | | | | | | | |
| (7) | | | | | | | |
| (8) | | | | | | | |
| (9) | | | | | | | |
| | | | | | | | |
| (10) | | | | | | | |
| | <u> </u> | | | | | | |
| 2 Enter total number of section 501(c)(3 | , , | | 1 table | | | | |

20-0205035

| (a) Type of grant or assistance | (b) Number of | (c) Amount of | (d) Amount of | (e) Method of valuation (book, | (f) Description of noncash assistance |
|---------------------------------|--------------------------|-----------------------|-----------------------|--------------------------------|---------------------------------------|
| | recipients | cash grant | noncash assistance | FMV, appraisal, other) | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| IV Supplemental Information. Pr | ovide the information re | equired in Part I, li | ne 2; Part III, colum | n (b); and any other addi | tional information. |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

SCHEDULE J (Form 990)

Department of the Treasury

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

2023

Open to Public Inspection

Internal Revenue Service Go
Name of the organization

Parkinson Research Foundation Inc

Employer identification number 20-0205035

| Part | I Questions Regarding Compensation | | | |
|------|---|-----|-----|----|
| | | | Yes | No |
| 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 | 41- | | |
| | ехріані | 1b | | |
| _ | Did the comparing ties apprise collection being to asimply union on all position asymptotic property all | | | |
| 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? | 2 | | |
| | | | | |
| 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 | | | |
| | Typrovar by the board of 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: | | | |
| а | Receive a severance payment or change-of-control payment? | 4a | | x |
| b | Participate in or receive payment from a supplemental nonqualified retirement plan? | 4b | | x |
| С | Participate in or receive payment from an equity-based compensation arrangement? | 4c | | х |
| | 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: | | | |
| а | The organization? | 5a | | х |
| b | Any related organization? | 5b | | х |
| | 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: | | | |
| а | The organization? | 6a | | x |
| b | Any related organization? | 6b | | х |
| | 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 | 7 | | x |
| 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 | 8 | | v |
| | IIII CILLIII | 0 | | X |
| 9 | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in | | | |
| 9 | Regulations section 53.4958-6(c)? | 9 | | |
| | | - | 1 | 1 |

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

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.

| | | (B) Breakdown of W-2 ar | nd/or 1099-MISC and/or | 1099-NEC compensation | (C) Retirement and | (D) Nontaxable | (E) Total of columns | (F) Compensation |
|-------------------------|-------------|-------------------------|-------------------------------------|-------------------------------------|-----------------------------|----------------|----------------------|--|
| (A) Name and Title | | (i) Base compensation | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | other deferred compensation | benefits | (B)(i)-(D) | in column (B) reported as deferred on prior Form 990 |
| Lawrence Hoffheimer | (i) | 104,390 | 7,000 | 0 | 0 | 5,727 | 117,117 | 0 |
| 1 Chairman of the Board | (ii) | 144,890 | 34,000 | 0 | 0 | 0 | 178,890 | 0 |
| Linda Patterson | (i) | 65,000 | 0 | 0 | 0 | 0 | 65,000 | 0 |
| 2 Treasurer | (ii) | 102,500 | 0 | 0 | 0 | 0 | 102,500 | 0_ |
| | (i) | | | | | | | |
| 3 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 4 | (ii) | | | | | | | |
| _ | (i) | | | | | | | |
| 5 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 6 | (ii) | | | | | | | |
| 7 | (i) | | | | | | | |
| 7 | (ii) | | | | | | | |
| 8 | (i) (ii) | | | | | | | |
| | (i) | | | | | | | |
| 9 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 10 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 11 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 12 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 13 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 14 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 15 | (ii) | | | | | | | |
| | (i) | | | | | | | |
| 16 | (ii) | | | | | | | |

EEA Schedule J (Form 990) 2023

SCHEDULE L (Form 990)

Transactions With Interested Persons

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.

Attach to Form 990 or Form 990-EZ.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

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

Open To Public Inspection

| Name of th | ne organization | | | | | | | Emplo | yer ideı | ntificat | ion nui | mber | | |
|---------------|--------------------------|----------------------|-----------------------|------------|-----------------|----------------|------------|------------------------|-----------|----------|----------|-------------------|-----------|---------|
| Parkin | son Research | Foundation | Inc | | | | | 20-0 | 02050 | 35 | | | | |
| Part I | _ | | | | | | | ection 501(c)(29 | | | | | | |
| | Complete if th | e organization | answered "Ye | s" on F | orm 990 |), Part IV, li | ne 25 | ia or 25b, or For | rm 990 |)-EZ, | Part \ | /, line | 40b. | |
| 1 | (a) Name of disqualified | person | (b) Relationship be | tween disq | ualified pers | on and | | (c) Description | of transa | ction | | | (d) Cor | rected? |
| | | | or | ganization | | | | | | | | | Yes | No |
| | | | | | | | | | | | | | | |
| (1) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| (2) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| (3) | | | | | | | | | | | | | | |
| | ter the amount of tax | - | - | - | | | _ | - | | | | | | |
| | der section 4958 | | | | | | | | | | | | | |
| 3 Ent | ter the amount of tax, | if any, on line 2, a | above, reimburse | ed by the | e organiza | ation | | | | | \$_ | | | |
| | | | | | | | | | | | | | | |
| Part II | | l/or From Inter | | _ | | | , | | 00 B | | | | | |
| | | | | | | | | 38a, or Form 9 | 90, Pa | art IV, | line 2 | 26; or | if the | |
| | organization i | eported an am | Juni on Form | 990, Pa | art A, III i | ± 5, 6, 01 Zz | <u>z</u> . | T | | | | | T | |
| (a) Na | me of interested person | (b) Relationship | (c) Purpose of | , , , | oan to or | (e) Origin | | (f) Balance due | (g) In (| default? | | proved | (i) W | |
| | | with organization | loan | | m the nization? | principal am | ount | | | | by bo | ard or nittee? | agree | ment? |
| | | | | - | | - | | | | T | | 1 | | |
| | | | | То | From | | | | Yes | No | Yes | No | Yes | No |
| (4) | | | | | | | | | | | | | | |
| (1) | | | | | | | | | | | | | | |
| (2) | | | | | | | | | | | | | | |
| (2) | | | | | | | | | | | | | | |
| (3) | | | | | | | | | | | | | | |
| _(3) | | | | | | | | | | | | | | |
| (4) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| (5) | | | | | | | | | | | | | | |
| = | | | | <u> </u> | | | \$ | l | | | | | | |
| Part III | | sistance Bene | | | | | <u> </u> | | | | | | | |
| | | e organization | _ | | |), Part IV, li | ne 27 | ·. | | | | | | |
| (a) Na | ame of interested person | (b) Relation | nship between intere | ested | (c) A | mount of | | (d) Type of assistance | 9 | | (e) Purp | ose of a | assistand | е |
| | | perso | n and the organizatio | n | ass | istance | | | | | | | | |
| - | | | | | | | | | | | | | | |
| (1) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| (2) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| (3) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| (4) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sha organi reve | |
|---------------------------------|---|---------------------------|--------------------------------|---------------------------|----|
| | | | | Yes | No |
| | Family member of | | Employee processes | | |
| (1) Joanna Hoffheimer | CEO | 28,150 | state registrations. | | x |
| (2) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |
| (4) | | | | | + |
| (5) | | | | | |
| Part V Supplemental Information | | | | | |
| Provide additional informati | ion for responses to questions o | in Schedule L. See | e instructions. | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

EEA Schedule L (Form 990) 2023

SCHEDULE O (Form 990)

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.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization Attach to Form 990 or Form 990-EZ.

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

Open to Public Inspection

Employer identification number

20-0205035 Parkinson Research Foundation Inc 01. Officer, directors, etc. family relationship (Part VI, line 2) Lawrence Hoffheimer and Amy Carroll are related family members. 02. Committee meeting documentation (Part VI, line 8b) No committee meetings were held. 03. Form 990 governing body review (Part VI, line 11) All members of the board reviewed the tax return prior to submission to the Internal Revenue Service. 04. Conflict of interest policy compliance (Part VI, line 12c) Officers must sign annual disclosure statement disclosing conflicts of interest. 05. CEO, executive director, top management comp (Part VI, line 15a) Compensation was compared to other entities reported on their Form 990's and approved by the Board. 06. Other officer or key employee compensation (Part VI, line 15b Compensation was compared to other entities reported on their Form 990's and approved by the Board. 07. Form 990 availability to public (Part VI, line 18) Available upon request. 08. Governing documents, etc, available to public (Part VI, line 19)

Schedule O (Form 990) 2023 Page 2

Employer identification number Name of the organization Parkinson Research Foundation Inc 20-0205035 09. List of other fees for services expenses (Part IX, line 11g) Admin <u>11G</u> Total Program Fund Raising 20,600 Copywriting 9,270 2,060 9,270 25,347 2,535 Direct Mail Processors 11,406 11,406 11,209 Data Management 24,909 2,491 11,209 Direct Mail Services 383,287 172,479 38,329 172,479 Cleaning 15,735 12,588 2,832 315 10. General explanation attachment Part VI, Section C, Line 17 All states receive copies of Form 990.

EEA Schedule O (Form 990) 2023

SCHEDULE R (Form 990)

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047 2023

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

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Name of the organization Employer identification number 20-0205035 Parkinson Research Foundation Inc

| (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Total income | (e) End-of-year assets | (f) Direct controlling entity |
|--------------------------------|---|--|---|--|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | (b) Primary activity | (b) Primary activity Legal domicile (state or foreign country) | (b) Primary activity Legal domicile (state or foreign country) Total income | Primary activity Legal domicile (state or foreign country) Legal domicile (state or foreign country) End-of-year assets |

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 | Section 5 | g) 12(b)(13) ed entity? |
|--|-------------------------|---|----------------------------|--|-------------------------------|-----------|-------------------------------|
| | | | | | | Yes | No |
| (1) Macular Degeneration Association I, 27-302570 | 7Macular | | | | | | |
| 5969 Cattleridge Blvd, Suite 100 | Degeneration | | | | | | |
| Sarasota FL 34232 | Disease - | FL | 501(c)(3) | 10 | N/A | | x |
| (2) Parkinson Place Inc., 84-1890153 | Parkinson disease | | | | | | |
| 5969 Cattleridge Blvd, Suite 100 | education and | | | | | | |
| Sarasota FL 34232 | events | FL | 501(c)(3) | 10 | N/A | | x |
| (3) | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| (4) | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| (5) | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Part III

| Identification of Related Organizations Taxable as a Partnership. Complete if the organizations | anization answered "Yes" | on Form 990, | Part IV, line 34, |
|---|--------------------------|--------------|-------------------|
| hacquee it had one or more related organizations treated as a partnership during the tay v | oar . | | |

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

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 | | |
|--|-------------------------|---|-------------------------------|---|---------------------------------|---------------------------------------|--------------------------------|-----|----|
| | | | | | | | | Yes | No |
| (1) | | | | | | | | | |
| (2) | | | | | | | | | |
| (3) | | | | | | | | | |
| (4) | | | | | | | | | |
| (5) | | | | | | | | | |

| Scriedu | K (FUIII 990) 2023 | | | | | | aye . |
|--------------|---|------------------------------|---|-----------------------|----------|----------|-------|
| Par | V Transactions with Related Organizations. Complete if the organization answ | vered "Yes" on Form | 990, Part IV, line 34 | 4, 35b, or 36. | | | |
| Note | Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule. | | | | | Yes | No |
| 1 [| uring the tax year, did the organization engage in any of the following transactions with one or more related | organizations listed in Part | s II-IV? | | | | |
| a F | eceipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity | | | | 1a | | х |
| b (| ift, grant, or capital contribution to related organization(s) | | | | 1b | x | |
| С (| ift, grant, or capital contribution from related organization(s) | | | | 1c | | х |
| d L | pans or loan guarantees to or for related organization(s) | | | | 1d | x | -11 |
| | pans or loan guarantees by related organization(s) | | | | 1e | | х |
| | | | | | | | |
| f [| vidends from related organization(s) | | | | 1f | | х |
| | ale of assets to related organization(s) | | | | 1g | | X |
| _ | urchase of assets from related organization(s) | | | | 1h | | |
| | kchange of assets with related organization(s) | | | | 1i | | _X |
| | ease of facilities, equipment, or other assets to related organization(s) | | | | 1j | | Х |
| , , | rase of facilities, equipment, of other assets to related organization(s) | | | | ', | x | |
| l . 1 | ease of facilities, equipment, or other assets from related organization(s) | | | | 11 | | |
| | | | | | 1k 1l | | х |
| | erformance of services or membership or fundraising solicitations for related organization(s) | | | | | | X |
| | erformance of services or membership or fundraising solicitations by related organization(s) | | | | 1m | | X |
| | naring of facilities, equipment, mailing lists, or other assets with related organization(s) | | | | 1n | х | |
| 0 8 | naring of paid employees with related organization(s) | | • | • • • • • • • • • • | 10 | х | |
| | | | | | | | |
| - | eimbursement paid to related organization(s) for expenses | | | | 1p | | х |
| q F | eimbursement paid by related organization(s) for expenses | | | | 1q | х | |
| | | | | | | | |
| | ther transfer of cash or property to related organization(s) | | | | 1r | | х |
| s (| ther transfer of cash or property from related organization(s) | | | | 1s | | х |
| 2 I | the answer to any of the above is "Yes," see the instructions for information on who must complete this line, | ncluding covered relations | hips and transaction thre | sholds. | | | |
| | (a) | (b) | (c) | (d) | | | |
| | Name of related organization | Transaction | Amount involved | Method of determining | amount | involved | |
| | | type (a-s) | | | | | |
| | | | | | | | |
| (1) | | | | | | | |
| | | | | | | | |
| (2) | | | | | | | |
| | | | | | | | |
| (3) | | | | | | | |
| | | | | | | | |
| (4) | | | | | | | |
| | | | | 1 | | | |

(5)

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 | sec 501 | partners | (f) Share of total income | (g) Share of end-of-year assets | Disprop | n) ortionate ations? | (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | Gene mana parti | aging | (k) Percentage ownership |
|------|---|-------------------------|---|---|------------|----------|---------------------------------|--|---------|----------------------------|---|-----------------------|-----------|--------------------------------|
| | | | | sections 512-514) | Yes | No | | | Yes | No | | Yes | No | |
| (1) | | | | | | | | | | | | | | |
| (2) | | | | | | | | | | | | | | |
| (3) | | | | | | | | | | | | | | |
| (4) | | | | | | | | | | | | | | |
| (5) | | | | | | | | | | | | | | |
| (6) | | | | | | | | | | | | | | |
| (7) | | | | | | | | | | | | | | |
| (8) | | | | | | | | | | | | | | |
| (9) | | | | | | | | | | | | | | |
| (10) | | | | | | | | | | | | | | |
| (11) | | | | | | | | | | | | | | |
| (12) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | Sahad | lula D (E | form 990) 2023 |

Form **4562**

Department of the Treasury

Internal Revenue Service

Depreciation and Amortization

(Including Information on Listed Property)

Attach to your tax return.

Go to www.irs.gov/Form4562 for instructions and the latest information.

OMB No. 1545-0172 **2023**

Attachment Sequence No. 179

Business or activity to which this form relates Identifying number Name(s) shown on return Parkinson Research Foundation In FORM 990 - 1 20-0205035 **Election To Expense Certain Property Under Section 179** Note: If you have any listed property, complete Part V before you complete Part I. 1 2 Threshold cost of section 179 property before reduction in limitation (see instructions) 3 4 4 Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing 6 (a) Description of property (b) Cost (business use only) Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7 9 9 10 10 Carryover of disallowed deduction from line 13 of your 2022 Form 4562 11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions 11 12 Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11 Carryover of disallowed deduction to 2024. Add lines 9 and 10, less line 12 . . . Note: Don't use Part II or Part III below for listed property. Instead, use Part V. Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.) 14 Special depreciation allowance for qualified property (other than listed property) placed in service 14 15 16 1,318 Part III MACRS Depreciation (Don't include listed property. See instructions.) Section A 17 MACRS deductions for assets placed in service in tax years beginning before 2023 18 If you are electing to group any assets placed in service during the tax year into one or more general Section B - Assets Placed in Service During 2023 Tax Year Using the General Depreciation System (b) Month and year (c) Basis for depreciation (d) Recovery (a) Classification of property placed in (business/investment use (e) Convention (f) Method (g) Depreciation deduction period only-see instructions) 19a 3-year property b 5-year property 6,613 5 ΗY SL 661 7-year property 2,837 ΗY \mathtt{SL} 203 d 10-year property e 15-year property 20-year property g 25-year property 25 yrs. S/L h Residential rental 27.5 yrs. MM S/I 27.5 yrs. MM S/L property S/L i Nonresidential real 39 yrs. MM MM S/L property Section C - Assets Placed in Service During 2023 Tax Year Using the Alternative Depreciation System 20a Class life S/L S/L 12 yrs. **b** 12-year c 30-year 30 yrs. MM S/L S/L d 40-vear 40 vrs. Part IV Summary (See instructions.) 22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instructions 2,182 23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs 23

| | Federal Supporting Statements | 2023 | PG01 |
|----------------------------|-------------------------------|---------------|-----------|
| Name(s) as shown on return | | Tax ID Number | |
| <u>Parkinson</u> R | esearch Foundation Inc | 2 | 0-0205035 |

Form 990, Part VI, Section C, line 17

Statement #017

States where a copy of this Form 990 is required to be filed:

Alaska
Alabama
Arkansas
Arizona
California
Colorado
Connecticut
District of Columbia

District of
Delaware
Florida
Georgia
Hawaii
Iowa
Idaho
Illinois
Indiana
Kansas
Kentucky

Louisiana

Massachusetts
Maryland
Maine
Michigan
Minnesota
Missouri
Mississippi
Montana

North Carolina North Dakota Nebraska New Hampshire
New Jersey
New Mexico
Nevada
New York
Ohio
Oklahoma
Oregon

Pennsylvania
Rhode Island
South Carolina
South Dakota
Tennessee
Texas
Utah
Virginia
Vermont
Washington
Wisconsin
West Virginia
Wyoming

Parkinson Research Foundation Inc Tax Exempt Diagnostic Summary Employer Identification # 20-0205035

Demographics

Mailing Address: Phone: (941)870-4438

5969 Cattleridge Blvd #100 Email:

Sarasota, FL 34232

Resident State: FL

Signor of Return

Officer: Linda Patterson Title: Treasurer

Diagnostics

Preparer: Linda Patterson Invoice: Date: 08-14-2024

Return Information

| Itama an Datum | 2023 | 2022 Federal |
|----------------------|-----------|----------------|
| Item on Return | Federal | (If available) |
| Total Revenue | 2,398,315 | 2,335,772 |
| Total Expenses | 2,227,155 | 2,002,716 |
| Net Excess (Deficit) | 171,160 | 333,056 |
| Net Assets or Fund | | |
| Balances | 2,545,730 | 2,279,905 |

State/City Information

| State/City | <u>Taxable</u> | <u>Total</u> | Total Change Fund | | <u>Total</u> | Refund/ |
|------------|----------------|--------------|-------------------|--|--------------|---------------|
| | Revenue | Expenses | Balance | | Tax | (Balance Due) |