

## TAX RETURN FILING INSTRUCTIONS

### PUBLIC INSPECTION COPY

Prepared by	Grant Thornton LLP 2010 Corporate Ridge, Suite 400 McLean, VA 22102
Special Instructions	Returns should be signed and dated by the appropriate officer(s).  Exempt organizations are required to provide copies of their most recent Forms 990, and their Application for Recognition of Exemption (Form 1023 or 1024) for public inspection upon request. Charities must also make available Forms 990-T filed after August 17, 2006. Schedules, attachments, and supporting documents filed with Form 990-T that do not relate to the imposition of unrelated business income tax are not required to be made available for public inspection and copying (e.g. Form 5471, <i>Information Return of U.S. Persons With Respect to Certain Foreign Corporations</i> and Form 8886, <i>Reportable Transaction Disclosure Statement</i> ). Forms 990 and 990-T must be made available for the three-year period beginning on the last day prescribed for filing such return (determined with regard to any extension of time for filing). The names of any contributors should not be disclosed, so we have deleted them.
Application for Recognition of Exemption	The copy of the Application for Recognition of Exemption must include any papers submitted in support of such application and any letter or other document issued by the Internal Revenue Service with respect to such application.  An organization that submitted its Form 1023 or 1024 on or before July 15, 1987 must make this form available for public inspection only if they had a copy of the Application on July 15, 1987.
Requests made in person	In the request is made in person, the organization must respond by the end of the business day.
Requests made in writing	If the request is made in writing, the organization must respond within 30 days.
Fees charged for copies	The organization can make a reasonable charge for copying and posting. The regulations limit the copying charge to that charged by the IRS for providing copies, currently \$0.20 for each page.
What if we post Form 990 on our website?	The requirement to provide copies can be eliminated if the organization posts the relevant documents on its website. The public must be able to download the documents and print them in the exact form they were filed with the IRS (except for disclosing contributors). The download must be free and use software that is available without charge. Even if the documents are posted on the web, the organization must still have a copy available for inspection at its offices.
What if we fail to comply with requests?	The IRS may impose significant monetary penalties on an organization that does not adhere to the disclosure requirements.

<b>Cumulative e-File History 2014</b>	
<b>Federal</b>	
Locator:	35880V
Taxpayer Name:	The AOPA Foundation, Inc.
Return Type:	990, 990
<hr/>	
Submitted Date:	08/06/2015 09:42:10
Acknowledgement Date:	08/06/2015 09:56:26
Status:	Accepted
Submission ID:	54681420152185000000

IRS e-file Signature Authorization  
for an Exempt Organization

OMB No 1545-1878

For calendar year 2014, or fiscal year beginning 2014 and ending 20

► Do not send to the IRS. Keep for your records.

► Information about Form 8879-EO and its instructions is at [www.irs.gov/form8879eo](http://www.irs.gov/form8879eo).Department of the Treasury  
Internal Revenue Service

Name of exempt organization

THE AOPA FOUNDATION, INC.Employer identification number  
20-8817225

Name and title of officer

ERICA SACCOIA, SVP-FINANCE**Part I Type of Return and Return Information (Whole Dollars Only)**

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0). But, if you entered -0 on the return, then enter -0 on the applicable line below. Do not complete more than 1 line in Part I.

1a Form 890 check here ► <input checked="" type="checkbox"/>	b Total revenue, if any (Form 890, Part VIII, column (A), line 12) . . .	1b <u>10047327</u>
2a Form 990-EZ check here ► <input type="checkbox"/>	b Total revenue, if any (Form 990-EZ, line 9) . . . . .	2b _____
3a Form 1120-POL check here ► <input type="checkbox"/>	b Total tax (Form 1120-POL, line 22) . . . . .	3b _____
4a Form 990-PF check here ► <input type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part VI, line 5) . . . . .	4b _____
5a Form 8868 check here ► <input type="checkbox"/>	b Balance Due (Form 8868, Part I, line 3c or Part II, line 8c) . . . . .	5b _____

**Part II Declaration and Signature Authorization of Officer**

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2014 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

I authorize GRANT THORNTON LLP to enter my PIN 4 2 7 7 2 as my signature  
ERO firm name  
Enter five numbers, but  
do not enter all zeros

on the organization's tax year 2014 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2014 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ► Erica SaccoiaDate ► B-6-15**Part III Certification and Authentication**

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

5 4 6 8 1 4 3 6 6 0 5  
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2014 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ► Mary O'TooleDate ► 8/6/15

**ERO Must Retain This Form - See Instructions  
Do Not Submit This Form To the IRS Unless Requested To Do So**

For Paperwork Reduction Act Notice, see back of form.

Form 8879-EO (2014)

Form 990

Department of the Treasury  
Internal Revenue ServiceEXTENSION FILED  
Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2014

Open to Public  
InspectionUnder 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.  
► Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

A For the 2014 calendar year, or tax year beginning		, 2014, and ending		, 20	
<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending		<b>C</b> Name of organization THE AOPA FOUNDATION, INC.  <b>Doing Business As</b>  <b>D</b> Employer identification number 20-8817225			
		<b>E</b> Telephone number (301) 695-2000			
		<b>F</b> Name and address of principal officer MARK BAKER, CEO 421 AVIATION WAY FREDERICK, MD 21701		<b>G</b> Gross receipts \$ 11,875,435.	
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>J</b> Website: ► <a href="http://WWW.AOPA.ORG/FOUNDATION">WWW.AOPA.ORG/FOUNDATION</a>		<b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No <small>If "No," attach a list. (see instructions)</small>			
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ►		<b>L</b> Year of formation: 2007		<b>M</b> State of legal domicile: MD	

## Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: AFI WORKS TO IMPROVE AVIATION SAFETY, PRESERVE COMMUNITY AIRPORTS, AND ENCOURAGE LEARNING TO FLY FOR CAREER AND PERSONAL BENEFIT.			
	2 Check this box ► <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.			
	3 Number of voting members of the governing body (Part VI, line 1a)	3	11.	
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	10.	
	5 Total number of individuals employed in calendar year 2014 (Part V, line 2a)	5	28.	
	6 Total number of volunteers (estimate if necessary)	6	0	
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	3,633.	
b Net unrelated business taxable income from Form 990-T, line 34	7b	1,797.		
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year	
	9 Program service revenue (Part VIII, line 2g)	6,296,243.	8,194,165.	
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	1,206,935.	1,332,757.	
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	243,982.	516,772.	
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	77,063.	3,633.	
		7,824,223.	10,047,327.	
		1,300,000.	1,605,000.	
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)			
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0	
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	2,620,342.	2,897,106.	
	16a Professional fundraising fees (Part IX, column (A), line 11e)	215,441.	92,030.	
	b Total fundraising expenses (Part IX, column (D), line 25) ► 556,241.			
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	3,414,529.	4,256,208.	
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	7,550,312.	8,850,344.	
19 Revenue less expenses. Subtract line 18 from line 12	273,911.	1,196,983.		
Net Assets or Fund Balances	Beginning of Current Year	End of Year		
	20 Total assets (Part X, line 16)	34,473,022.	36,508,865.	
	21 Total liabilities (Part X, line 26)	956,414.	1,380,977.	
	22 Net assets or fund balances. Subtract line 21 from line 20	33,516,608.	35,127,886.	

## Part II Signature Block

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

Sign Here	► <i>Erica Saccoia</i>	► <i>8-6-15</i>			
	Signature of officer ► ERICA SACCOIA	Date SVP-FINANCE			
Paid Preparer Use Only	Print/Type preparer's name MARY TORRETTA	Preparer's signature <i>Mary O'Youllet</i>	Date 08/06/2015	Check <input type="checkbox"/> if self-employed	PTIN P00847851
	Firm's name ► GRANT THORNTON LLP			Firm's EIN ► 3660555558	
	Firm's address ► 2010 CORPORATE RIDGE, SUITE 400 MCLEAN, VA 22102			Phone no.	7038477500

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2014)

Application for Extension of Time To File an  
Exempt Organization Return► File a separate application for each return.  
► Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box . . . . . ►
- If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

**Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).**

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only . . . . . ► 

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Enter filer's identifying number, see Instructions

Type or print  File by the due date for filing your return. See Instructions.	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	THE AOPA FOUNDATION, INC.	20-8817225
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	421 AVIATION WAY	
City, town or post office, state, and ZIP code. For a foreign address, see instructions		
FREDERICK, MD 21701		

Enter the Return code for the return that this application is for (file a separate application for each return) . . . . .

 0  1

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ►ERIC SACCIA, SVP FINANCE, 421 AVIATION WAY FREDERICK, MD 21701

Telephone No. ► 301 695-2000

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box . . . . . ►
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . . . . . If this is for the whole group, check this box . . . . . ►  . If it is for part of the group, check this box . . . . . ►  and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15/2015 to file the exempt organization return for the organization named above. The extension is for the organization's return for:

►  calendar year 2014 or

►  tax year beginning \_\_\_\_\_, 20\_\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_\_.

2 If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  
 Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See Instructions. 3a \$ 0

b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. 3b \$ 0

c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See Instructions. 3c \$ 0

Caution. If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 1-2014)

**Form 990 (2014)**

## Part III Statement of Program Service Accomplishments

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

**1 Briefly describe the organization's mission:**

ATTACHMENT 1

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . .  Yes  No  
If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . .  Yes  No  
If "Yes," describe these changes on Schedule O.

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

4a (Code: ) (Expenses \$ 7,579,234, including grants of \$ 1,605,000, ) (Revenue \$ 1,332,757, )

ATTACHMENT 2

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

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

**4d Other program services (Describe in Schedule O.)**

(Expenses \$ **including grants of \$**

) (Revenue \$

3

#### 4e Total program service expenses ►

7,579,234.

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

## Part IV Checklist of Required Schedules (continued)

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

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V . . . . . 

1a Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. . . . . 1a 45  
 b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. . . . . 1b 0

c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . . 1c X

2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . . . 2a 28  
 b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions). . . . . 2b X

3a Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .  
 b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O . . . . . 3a X  
 3b X

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)? . . . . .  
 b If "Yes," enter the name of the foreign country: ► ATTACHMENT 3

See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).

5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .

b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  
 c If "Yes" to line 5a or 5b, did the organization file Form 8886-T? . . . . .

6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .

b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .

**7 Organizations that may receive deductible contributions under section 170(c).**

a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .

b If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .

c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .

d If "Yes," indicate the number of Forms 8282 filed during the year . . . . . 7d 3

e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .

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

g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .

h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .

8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .

**9 Sponsoring organizations maintaining donor advised funds.**

a Did the sponsoring organization make any taxable distributions under section 4966? . . . . .

b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .

**10 Section 501(c)(7) organizations. Enter:**

a Initiation fees and capital contributions included on Part VIII, line 12 . . . . . 10a

b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . . . . . 10b

**11 Section 501(c)(12) organizations. Enter:**

a Gross income from members or shareholders . . . . . 11a

b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . . . 11b

12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? . . . . . 12a

b If "Yes," enter the amount of tax-exempt interest received or accrued during the year . . . . . 12b

**13 Section 501(c)(29) qualified nonprofit health insurance issuers.**

a Is the organization licensed to issue qualified health plans in more than one state? . . . . .

Note. See the instructions for additional information the organization must report on Schedule O.

b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . . 13b

c Enter the amount of reserves on hand . . . . . 13c

14a Did the organization receive any payments for indoor tanning services during the tax year? . . . . .

b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O . . . . . 14b X

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

### Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year . . . . .	1a 11	
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
1b	Enter the number of voting members included in line 1a, above, who are independent . . . . .	1b 10	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .	2 X	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? . . . . .	3 X	
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .	4 X	
5	Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .	5 X	
6	Did the organization have members or stockholders? . . . . .	6 X	
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .	7a X	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .	7b X	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body? . . . . .	8a X	
b	Each committee with authority to act on behalf of the governing body? . . . . .	8b X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O. . . . .	9 X	

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

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

### Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed ► **ATTACHMENT 4**
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 

Own website  Another's website  Upon request  Other (explain in Schedule O)
- 19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20 State the name, address, and telephone number of the person who possesses the organization's books and records: ►

ERICA SACCOIA, SVP FINANCE 421 AVIATION WAY FREDERICK, MD 21701

301-695-2000

**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 instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations	
		or director	Individual trustee	Institutional trustee	Officer	Key employee	Highest compensated	Former		
(1) WILLIAM C. TRIMBLE III CHAIRMAN	1.00		X		X				0	0
(2) PAUL C. HEINTZ TRUSTEE	1.00		X						0	0
(3) HERMAN NEEL HIPP, JR. TRUSTEE	1.00		X						0	0
(4) BURGESS H. HAMLET III TRUSTEE	1.00		X						0	0
(5) DARRELL W. CRATE VICE CHAIRMAN	1.00		X		X				0	0
(6) LAWRENCE D. BUHL III TRUSTEE	1.00		X						0	0
(7) JAMES G. TUTHILL, JR. TRUSTEE	1.00		X						0	0
(8) MARK R. BAKER CHIEF EXECUTIVE OFFICER	10.00 40.00		X		X				742,002.	40,700.
(9) MATTHEW J. DESCH TRUSTEE	1.00		X						0	0
(10) AMANDA C. FARNSWORTH TRUSTEE	1.00		X						0	0
(11) JAMES N. HAUSLEIN TREASURER	1.00		X		X				0	0
(12) KENNETH M. MEAD EVP & GENERAL COUNSEL	10.00 40.00		X						489,719.	22,152.
(13) TIMOTHY J. FORTUNE CHIEF ADMINISTRATIVE OFFICER	10.00 40.00		X						293,994.	29,916.
(14) BRUCE S. LANDSBERG PRESIDENT (THROUGH 12/31/14)	40.00		X						336,935.	32,379.

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

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ► 5

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual . . . . .	3 X	
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual . . . . .	4 X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person . . . . .	5 X	

**Section B. Independent Contractors**

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

(A) Name and business address	(B) Description of services	(C) Compensation
ATTACHMENT 5		

## Part VIII

## Statement of Revenue

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

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>					
1a Federated campaigns . . . . .	1a				
b Membership dues . . . . .	1b				
c Fundraising events . . . . .	1c				
d Related organizations . . . . .	1d	390,000.			
e Government grants (contributions) . . . . .	1e	14,295.			
f All other contributions, gifts, grants, and similar amounts not included above . . . . .	1f	7,789,870.			
g Noncash contributions included in lines 1a-1f: \$		239,426.			
<b>h Total. Add lines 1a-1f . . . . . ►</b>		<b>8,194,165.</b>			
<b>Program Service Revenue</b>	<b>Business Code</b>				
2a EDUCATIONAL COURSE	900099	1,332,757.	1,332,757.		
b					
c					
d					
e					
f All other program service revenue . . . . .					
<b>g Total. Add lines 2a-2f . . . . . ►</b>		<b>1,332,757.</b>			
<b>Other Revenue</b>					
3 Investment income (including dividends, interest, and other similar amounts). . . . . ►		311,667.			311,667.
4 Income from investment of tax-exempt bond proceeds . . . . . ►		0			
5 Royalties . . . . .		0			
6a Gross rents . . . . .	(i) Real				
b Less: rental expenses . . . . .	(ii) Personal				
c Rental income or (loss) . . . . .					
d Net rental income or (loss) . . . . . ►		0			
7a Gross amount from sales of assets other than inventory	(i) Securities				
b Less: cost or other basis and sales expenses . . . . .	(ii) Other				
c Gain or (loss) . . . . .	2,033,213.				
d Net gain or (loss) . . . . . ►	1,828,108.		205,105.		205,105.
8a Gross income from fundraising events (not including \$ . . . . . of contributions reported on line 1c). See Part IV, line 18 . . . . . a					
b Less: direct expenses . . . . . b					
c Net income or (loss) from fundraising events . . . . . ►		0			
9a Gross income from gaming activities. See Part IV, line 19 . . . . . a					
b Less: direct expenses . . . . . b					
c Net income or (loss) from gaming activities. . . . . ►		0			
10a Gross sales of inventory, less returns and allowances . . . . . a					
b Less: cost of goods sold . . . . . b					
c Net income or (loss) from sales of inventory. . . . . ►		0			
<b>Miscellaneous Revenue</b>	<b>Business Code</b>				
11a ADVERTISING	541800	3,633.		3,633.	
b					
c					
d All other revenue . . . . .					
e Total. Add lines 11a-11d . . . . . ►		3,633.			
<b>12 Total revenue. See instructions . . . . . ►</b>		<b>10,047,327.</b>	<b>1,332,757.</b>	<b>3,633.</b>	<b>516,772.</b>

**Part IX Statement of Functional Expenses**

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

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

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A) Total expenses</b>	<b>(B) Program service expenses</b>	<b>(C) Management and general expenses</b>	<b>(D) Fundraising expenses</b>
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .	1,605,000.	1,605,000.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .	0			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .	0			
4 Benefits paid to or for members . . . . .	0			
5 Compensation of current officers, directors, trustees, and key employees . . . . .	487,453.	387,567.	51,793.	48,093.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .	0			
7 Other salaries and wages . . . . .	1,855,869.	1,392,578.	259,095.	204,196.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .	112,620.	82,233.	16,988.	13,399.
9 Other employee benefits . . . . .	296,814.	229,466.	45,367.	21,981.
10 Payroll taxes . . . . .	144,350.	105,401.	21,775.	17,174.
11 Fees for services (non-employees):				
a Management . . . . .	0			
b Legal . . . . .	3,527.		3,527.	
c Accounting . . . . .	28,878.		28,878.	
d Lobbying . . . . .	0			
e Professional fundraising services. See Part IV, line 17. . . . .	92,030.			92,030.
f Investment management fees . . . . .	53,614.	53,614.		
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O). . . . .	367,076.	332,908.	5,285.	28,883.
12 Advertising and promotion . . . . .	152,911.	134,558.	2,519.	15,834.
13 Office expenses . . . . .	6,058.	3,425.	2,396.	237.
14 Information technology. . . . .	403,664.	403,664.		
15 Royalties. . . . .	0			
16 Occupancy . . . . .	0			
17 Travel . . . . .	202,598.	174,112.	3,556.	24,930.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .	0			
19 Conferences, conventions, and meetings . . . . .	45,909.	39,018.	6.	6,885.
20 Interest . . . . .	0			
21 Payments to affiliates. . . . .	0			
22 Depreciation, depletion, and amortization . . . . .	42,964.		42,964.	
23 Insurance . . . . .	0			
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.) . . . . .				
a COURSE EXPENSE . . . . .	541,102.	541,102.		
b RENTALS, REPAIRS & MAINTENAN . . . . .	234,182.	232,635.		1,547.
c PRINT, MAIL & POSTAGE . . . . .	645,638.	584,512.	11,554.	49,572.
d SHARED COSTS & OVERHEAD ALLO . . . . .	1,174,317.	1,094,587.	49,112.	30,618.
e All other expenses . . . . .	353,770.	182,854.	170,054.	862.
25 Total functional expenses. Add lines 1 through 24a	8,850,344.	7,579,234.	714,869.	556,241.
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 ► <input checked="" type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .	0	2,338,476.		556,238.

## Part X Balance Sheet

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

		(A) Beginning of year	(B) End of year
<b>Assets</b>			
1	Cash - non-interest-bearing . . . . .	3,567,623.	1 4,788,721.
2	Savings and temporary cash investments . . . . .	0 2	0
3	Pledges and grants receivable, net . . . . .	4,952,908.	3 4,379,507.
4	Accounts receivable, net . . . . .	181,055.	4 97,742.
5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .	0 5	0
6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see Instructions). Complete Part II of Schedule L . . . . .	0 6	0
7	Notes and loans receivable, net . . . . .	0 7	0
8	Inventories for sale or use . . . . .	0 8	0
9	Prepaid expenses and deferred charges . . . . .	66,154.	9 59,502.
10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 466,565.	
b	Less: accumulated depreciation . . . . .	10b 316,191.	10c 150,374.
11	Investments - publicly traded securities . . . . .	21,066,770.	11 22,454,342.
12	Investments - other securities. See Part IV, line 11 . . . . .	4,362,727.	12 4,503,677.
13	Investments - program-related. See Part IV, line 11 . . . . .	0 13	0
14	Intangible assets . . . . .	0 14	0
15	Other assets. See Part IV, line 11 . . . . .	103,000.	15 75,000.
16	<b>Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	34,473,022.	16 36,508,865.
<b>Liabilities</b>			
17	Accounts payable and accrued expenses . . . . .	523,006.	17 733,680.
18	Grants payable . . . . .	0 18	0
19	Deferred revenue . . . . .	126,571.	19 188,311.
20	Tax-exempt bond liabilities . . . . .	0 20	0
21	Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .	0 21	0
22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .	0 22	0
23	Secured mortgages and notes payable to unrelated third parties . . . . .	0 23	0
24	Unsecured notes and loans payable to unrelated third parties . . . . .	0 24	0
25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D . . . . .	306,837.	25 458,986.
26	<b>Total liabilities.</b> Add lines 17 through 25 . . . . .	956,414.	26 1,380,977.
<b>Net Assets or Fund Balances</b>			
	Organizations that follow SFAS 117 (ASC 958), check here ► <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.		
27	Unrestricted net assets . . . . .	15,424,638.	27 15,299,761.
28	Temporarily restricted net assets . . . . .	7,652,568.	28 9,213,034.
29	Permanently restricted net assets . . . . .	10,439,402.	29 10,615,093.
	Organizations that do not follow SFAS 117 (ASC 958), check here ► <input type="checkbox"/> and complete lines 30 through 34.		
30	Capital stock or trust principal, or current funds . . . . .		30
31	Paid-in or capital surplus, or land, building, or equipment fund . . . . .		31
32	Retained earnings, endowment, accumulated income, or other funds . . . . .		32
33	<b>Total net assets or fund balances.</b> . . . . .	33,516,608.	33 35,127,888.
34	<b>Total liabilities and net assets/fund balances.</b> . . . . .	34,473,022.	34 36,508,865.

**Part 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	10,047,327.
2 Total expenses (must equal Part IX, column (A), line 25) . . . . .	2	8,850,344.
3 Revenue less expenses. Subtract line 2 from line 1 . . . . .	3	1,196,983.
4 Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . . . . .	4	33,516,608.
5 Net unrealized gains (losses) on investments . . . . .	5	414,297.
6 Donated services and use of facilities . . . . .	6	0
7 Investment expenses . . . . .	7	0
8 Prior period adjustments . . . . .	8	0
9 Other changes in net assets or fund balances (explain in Schedule O) . . . . .	9	0
10 Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B)) . . . . .	10	35,127,888.

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

**SCHEDULE A**  
(Form 990 or 990-EZ)

**Public Charity Status and Public Support**

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Department of the Treasury  
Internal Revenue Service

► Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Name of the organization

THE AOPA FOUNDATION, INC.

Employer Identification number

20-8817225

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1  A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
- 2  A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).
- 4  A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)
- 8  A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)
- 9  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.)
- 10  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations . . . . .
  - g Provide the following information about the supported organization(s).

(I) Name of supported organization	(II) EIN	(III) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(IV) Is the organization listed in your governing document?		(V) Amount of monetary support (see instructions)	(VI) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

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

Schedule A (Form 990 or 990-EZ) 2014

**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.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .	7,680,395.	6,542,554.	7,352,755.	6,296,243.	8,194,165.	36,066,112.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						0
3 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						0
4 Total. Add lines 1 through 3 . . . . .	7,680,395.	6,542,554.	7,352,755.	6,296,243.	8,194,165.	36,066,112.
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). . . . .						3,787,252.
6 Public support. Subtract line 5 from line 4.						32,278,860.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
7 Amounts from line 4 . . . . .	7,680,395.	6,542,554.	7,352,755.	6,296,243.	8,194,165.	36,066,112.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .		211,723.	536,985.	469,412.	433,190.	1,962,977.
9 Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .					1,800.	3,633.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . ATCH-1 . . . . .	18,750.	4,740.	1,051.	263.		24,804.
11 Total support. Add lines 7 through 10 . . . . .						38,059,326.
12 Gross receipts from related activities, etc. (see instructions) . . . . .					12	5,227,370.
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here . . . . . ► <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2014 (line 6, column (f) divided by line 11, column (f)) . . . . .	14	84.81%
15 Public support percentage from 2013 Schedule A, Part II, line 14 . . . . .	15	83.07%
16a 33 1/3% support test - 2014. 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 . . . . . ► <input checked="" type="checkbox"/>		
b 33 1/3% support test - 2013. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization . . . . . ► <input type="checkbox"/>		
17a 10%-facts-and-circumstances test - 2014. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ► <input type="checkbox"/>		
b 10%-facts-and-circumstances test - 2013. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ► <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ► <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**(Complete only if you checked the box on line 9 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.)**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(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 furnished 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 . . . . .						
c Add lines 7a and 7b. . . . .						
8 Public support (Subtract line 7c from line 6.) . . . . .						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(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 . . . . .						
c Add lines 10a and 10b . . . . .						
11 Net income from unrelated business activities not included in 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 five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. . . . . ► <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f)). . . . .	15	%
16 Public support percentage from 2013 Schedule A, Part III, line 15 . . . . .	16	%

**Section D. Computation of Investment Income Percentage**

17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f)) . . . . .	17	%
18 Investment income percentage from 2013 Schedule A, Part III, line 17 . . . . .	18	%
19a 33 1/3% support tests - 2014. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ► <input type="checkbox"/>		
b 33 1/3% support tests - 2013. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ► <input type="checkbox"/>		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see Instructions ► <input type="checkbox"/>		

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	<b>Yes</b>	<b>No</b>
1		
2		
3a		
b		
c		
4a		
b		
c		
4c		
5a		
b		
c		
6		
7		
8		
9a		
b		
c		
9c		
10a		
b		
10b		

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.

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).

3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.

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.

c 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.

4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.

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.

c 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.

5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) 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).

b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?

c Substitutions only. Was the substitution the result of an event beyond the organization's control?

6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.

7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).

8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990).

9a Was the organization controlled directly or indirectly at any time during the tax year by one or more 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.

b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI.

c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.

10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer (b) below.

b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

**Part IV Supporting Organizations (continued)**

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a	
b A family member of a person described in (a) above?	11b	
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.	11c	

**Section B. Type I Supporting Organizations**

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's 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 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 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 the supported organization(s).	1	

**Section D. All Type III Supporting Organizations**

	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, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	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? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).	2	
3 By reason of the relationship described in (2), did the organization's supported organizations have 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 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 instructions):

- a  The organization satisfied the Activities Test. Complete line 2 below.
- b  The organization is the parent of each of its supported organizations. Complete line 3 below.
- c  The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).

2 Activities Test. Answer (a) and (b) below.

- a 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.

- b Did the activities described in (a) 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.

3 Parent of Supported Organizations. Answer (a) and (b) below.

- a 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? Provide details in Part VI.
- 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.

Schedule A (Form 990 or 990-EZ) 2014

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3	4		
5 Depreciation and depletion	5		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
<b>8 Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)</b>	<b>8</b>		
<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
e Discount claimed for blockage or other factors (explain in detail in Part VI):			
2 Acquisition indebtedness applicable to non-exempt-use assets	2		
3 Subtract line 2 from line 1d	3		
4 Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	4		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6 Multiply line 5 by .035	6		
7 Recoveries of prior-year distributions	7		
<b>8 Minimum Asset Amount (add line 7 to line 6)</b>	<b>8</b>		
<b>Section C - Distributable Amount</b>			Current Year
1 Adjusted net income for prior year (from Section A, line 8, Column A)	1		
2 Enter 85% of line 1	2		
3 Minimum asset amount for prior year (from Section B, line 8, Column A)	3		
4 Enter greater of line 2 or line 3	4		
5 Income tax imposed in prior year	5		
<b>6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)</b>	<b>6</b>		
<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).			

Schedule A (Form 990 or 990-EZ) 2014

Schedule A (Form 990 or 990-EZ) 2014

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**

<b>Section D - Distributions</b>		<b>Current Year</b>
<b>1</b>	Amounts paid to supported organizations to accomplish exempt purposes	
<b>2</b>	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
<b>3</b>	Administrative expenses paid to accomplish exempt purposes of supported organizations	
<b>4</b>	Amounts paid to acquire exempt-use assets	
<b>5</b>	Qualified set-aside amounts (prior IRS approval required)	
<b>6</b>	Other distributions (describe in Part VI). See instructions.	
<b>7</b>	<b>Total annual distributions.</b> Add lines 1 through 6.	
<b>8</b>	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
<b>9</b>	Distributable amount for 2014 from Section C, line 6	
<b>10</b>	Line 8 amount divided by Line 9 amount	

<b>Section E - Distribution Allocations (see instructions)</b>	<b>(i) Excess Distributions</b>	<b>(ii) Underdistributions Pre-2014</b>	<b>(iii) Distributable Amount for 2014</b>
<b>1</b> Distributable amount for 2014 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2014 (reasonable cause required-see instructions)			
<b>3</b> Excess distributions carryover, if any, to 2014:			
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> From 2013 . . . . .			
<b>f</b> Total of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2014 distributable amount			
<b>i</b> Carryover from 2009 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
<b>4</b> Distributions for 2014 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2014 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4.			
<b>5</b> Remaining underdistributions for years prior to 2014, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).			
<b>6</b> Remaining underdistributions for 2014. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).			
<b>7</b> Excess distributions carryover to 2015. Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b> Excess from 2013 . . . . .			
<b>e</b> Excess from 2014 . . . . .			

Schedule A (Form 990 or 990-EZ) 2014

**Part VI Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).ATTACHMENT 1**SCHEDULE A, PART II - OTHER INCOME**

DESCRIPTION	2010	2011	2012	2013	2014	TOTAL
SHARED COSTS (WITH 501C3)	18,750.					18,750.
OTHER		4,740.	1,051.	263.		6,054.
TOTALS	<u>18,750.</u>	<u>4,740.</u>	<u>1,051.</u>	<u>263.</u>		<u>24,804.</u>

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

**Schedule of Contributors**

OMB No. 1545-0047

**2014**

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

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

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number

20-8817225

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust not treated as a private foundation

527 political organization

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Form 990-PF

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

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

**Special Rules**

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

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

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

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

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization THE AOPA FOUNDATION, INC.

Employer identification number  
20-8817225

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 390,000.	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
2		\$ 290,000.	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
3		\$ 2,499,500.	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
4		\$ 200,000.	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>

Name of organization THE AOPA FOUNDATION, INC.

Employer identification number

20-8817225

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

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

**Name of organization** THE AOPA FOUNDATION, INC.

**Employer Identification number**

20-8817225

**Part III** *Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ \_\_\_\_\_*  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

**SCHEDULE D**  
**(Form 990)****Supplemental Financial Statements**

OMB No. 1545-0047

**2014**Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service► Complete if the organization answered "Yes" to Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

► Attach to Form 990.

► Information about Schedule D (Form 990) and its Instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Name of the organization

THE AOPA FOUNDATION, INC.

Employer Identification number

20-8817225

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

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

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

**Part II Conservation Easements.**

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).	<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education) <input type="checkbox"/> Preservation of a historically important land area <input type="checkbox"/> Protection of natural habitat <input type="checkbox"/> Preservation of a certified historic structure <input type="checkbox"/> 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.	<input type="checkbox"/> Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register .....	2d
3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ► -----	
4 Number of states where property subject to conservation easement is located ► -----	
5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....	<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ► -----	
7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ► \$ -----	
8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....	<input type="checkbox"/> Yes <input type="checkbox"/> No
9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.	

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

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

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.
b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
(i) Revenue included in Form 990, Part VIII, line 1 .....
(ii) Assets included in Form 990, Part X .....
2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:
a Revenue included in Form 990, Part VIII, line 1 .....
b Assets included in Form 990, Part X .....

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

Schedule D (Form 990) 2014

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

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

a <input type="checkbox"/> Public exhibition	d <input type="checkbox"/> Loan or exchange programs
b <input type="checkbox"/> Scholarly research	e <input type="checkbox"/> Other _____
c <input type="checkbox"/> Preservation for future generations	

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . . . .  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . .  Yes  No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII. . . . .

**Part V Endowment Funds.** Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance . . . . .	13,028,273.	12,577,719.	12,467,494.	12,346,793.	105,000.
b Contributions . . . . .	175,692.	450,554.	110,225.	120,701.	12,241,793.
c Net investment earnings, gains, and losses . . . . .					
d Grants or scholarships . . . . .					
e Other expenditures for facilities and programs . . . . .					
f Administrative expenses . . . . .					
g End of year balance . . . . .	13,203,965.	13,028,273.	12,577,719.	12,467,494.	12,346,793.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ► 20.0000 %

b Permanent endowment ► 80.0000 %

c Temporarily restricted endowment ► %

The percentages in lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

Yes	No
3a(i)	X
3a(ii)	X
3b	

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? . . . . .

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.** Complete if the organization answered "Yes" to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (Investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land . . . . .				
b Buildings . . . . .				
c Leasehold improvements . . . . .				
d Equipment . . . . .	2,615.	2,615.		
e Other . . . . .	463,950.	313,576.		150,374.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . . . ►				150,374.

Schedule D (Form 990) 2014

**Part VII Investments - Other Securities.**

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

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .		
(3) Other		
(A) ALTERNATIVE INVESTMENTS	4,503,677.	FMV
(B) . . . . .		
(C) . . . . .		
(D) . . . . .		
(E) . . . . .		
(F) . . . . .		
(G) . . . . .		
(H) . . . . .		
<b>Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) ►</b>	<b>4,503,677.</b>	

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

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

**Part X Other Liabilities.**

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

(a) Description of liability	(b) Book value	
(1) Federal income taxes		
(2) CHARITABLE GIFT ANNUITY	458,986.	
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ►</b>	<b>458,986.</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 FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Schedule D (Form 990) 2014**

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**  
Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements . . . . .	1	10,408,010.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments . . . . .	2a	414,297.
b	Donated services and use of facilities . . . . .	2b	
c	Recoveries of prior year grants . . . . .	2c	
d	Other (Describe in Part XIII.) . . . . .	2d	
e	Add lines 2a through 2d . . . . .	2e	414,297.
3	Subtract line 2e from line 1 . . . . .	3	9,993,713.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	4a	53,614.
b	Other (Describe in Part XIII.) . . . . .	4b	
c	Add lines 4a and 4b . . . . .	4c	53,614.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	10,047,327.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**  
Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	8,796,730.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	8,796,730.
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	53,614.
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	53,614.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	8,850,344.

Part XIII Supplemental Information.

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

SEE PAGE 5

**Part XIII Supplemental Information (continued)**

SCHEDULE D, PAGE 2 - PART V, ENDOWMENT FUNDS, LINE 4

ENDOWMENT FUNDS ARE USED TO SUPPORT AOPA FOUNDATION'S MISSION STATEMENT.

SEE FORM 990, PART III FOR DETAILED MISSION STATEMENT.

FIN 48 FOOTNOTE - SCHEDULE D, PART X, LINE 2

AFI ("FOUNDATION") IS RECOGNIZED AS EXEMPT ON INCOME OTHER THAN UNRELATED BUSINESS INCOME UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE ("IRC") AND IS CLASSIFIED AS AN ORGANIZATION THAT IS NOT A PRIVATE FOUNDATION AS DEFINED IN SECTION 509(A) OF THE IRC. FOR THE YEAR ENDED DECEMBER 31, 2013, THE FOUNDATION DID NOT GENERATE UNRELATED BUSINESS INCOME. FOR THE YEAR ENDED DECEMBER 31, 2014, THE FOUNDATION GENERATED UNRELATED INCOME. TAXES ASSOCIATED WITH THIS ARE INCLUDED WITHIN THE TAX PROVISION. THE FOUNDATION RECOGNIZES OR DERECOGNIZES TAX POSITIONS ON A "MORE LIKELY THAN NOT" THRESHOLD. THIS APPLIES TO A POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. THE FOUNDATION DOES NOT BELIEVE IT HAS ANY MATERIAL UNCERTAIN TAX POSITIONS.

**SCHEDULE F  
(Form 990)****Statement of Activities Outside the United States**

OMB No 1545-0047

**2014**Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number

20-8817225

► Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

► Attach to Form 990.

► Information about Schedule F (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**Part I General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

1 For grantmakers. Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . .  Yes  No

2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

**3 Activities per Region.** (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in region	(d) Activities conducted in region (by type) (e.g., fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for and investments in region
(1) CENTRAL AMERICA/CARIBBEAN			INVESTMENTS		3,693,916.
(2) EUROPE			INVESTMENTS		809,761.
(3)					
(4)					
(5)					
(6)					
(7)					
(8)					
(9)					
(10)					
(11)					
(12)					
(13)					
(14)					
(15)					
(16)					
(17)					
3a Sub-total . . . . .					4,503,677.
b Total from continuation sheets to Part I . . . . .					
c Totals (add lines 3a and 3b)					4,503,677.

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

JSA

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Schedule F (Form 990) 2014

THE AOPA FOUNDATION, INC.

20-8817225

Schedule F (Form 990) 2014

Page 2

**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter. ►

3 Enter total number of other organizations or entities. ►

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Schedule F (Form 1099) 2014

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THE AOPA FOUNDATION, INC.

20-8817225

Schedule F (Form 990) 2014

Page 3

**Part III Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of non-cash assistance	(g) Description of non-cash assistance	(h) Method of valuation (book, FMV, appraisal, other)
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							
(13)							
(14)							
(15)							
(16)							
(17)							
(18)							

Schedule F (Form 990) 2014

JSA  
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**Part IV Foreign Forms**

1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 926, *Return by a U.S. Transferor of Property to a Foreign Corporation* (see Instructions for Form 926) . . . . .  Yes  No

2 Did the organization have an interest in a foreign trust during the tax year? If "Yes," the organization may be required to file Form 3520, *Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts*, and/or Form 3520-A, *Annual Information Return of Foreign Trust With a U.S. Owner* (see Instructions for Forms 3520 and 3520-A; do not file with Form 990) . . . . .  Yes  No

3 Did the organization have an ownership interest in a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 5471, *Information Return of U.S. Persons With Respect To Certain Foreign Corporations* (see Instructions for Form 5471) . . . . .  Yes  No

4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? If "Yes," the organization may be required to file Form 8621, *Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund* (see Instructions for Form 8621) . . . . .  Yes  No

5 Did the organization have an ownership interest in a foreign partnership during the tax year? If "Yes," the organization may be required to file Form 8865, *Return of U.S. Persons With Respect To Certain Foreign Partnerships* (see Instructions for Form 8865) . . . . .  Yes  No

6 Did the organization have any operations in or related to any boycotting countries during the tax year? If "Yes," the organization may be required to file Form 5713, *International Boycott Report* (see Instructions for Form 5713; do not file with Form 990) . . . . .  Yes  No

**Part V Supplemental Information**

Complete this part to provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

**SCHEDULE G**  
**(Form 990 or 990-EZ)**  
 Department of the Treasury  
 Internal Revenue Service

**Supplemental Information Regarding Fundraising or Gaming Activities**

OMB No. 1545-0047

**2014**

Open to Public  
 Inspection

Complete if the organization answered "Yes" to Form 990, Part IV, lines 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.

► Information about Schedule G (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number

20-8817225

**Part I Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17.  
 Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

a <input checked="" type="checkbox"/>	Mail solicitations	e <input checked="" type="checkbox"/>	Solicitation of non-government grants
b <input checked="" type="checkbox"/>	Internet and email solicitations	f <input checked="" type="checkbox"/>	Solicitation of government grants
c <input checked="" type="checkbox"/>	Phone solicitations	g <input type="checkbox"/>	Special fundraising events
d <input checked="" type="checkbox"/>	In-person solicitations		

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?  Yes  No

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
1 INFOCISION, INC	FUNDRAISING	Yes	No	165,744.	92,030.	73,714.
2 ALLEGIANCE CREATIVE	ADVISOR		X		153,193.	
3						
4						
5						
6						
7						
8						
9						
10						
<b>Total</b>				165,744.	245,223.	73,714.

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

AL, AK, AZ, AR, CA, CO, CT, DC, FL, GA, HI, IL,  
 KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, NH, NJ, NM, NY, NC, ND, OH,  
 OK, OR, PA, RI, SC, TN, UT, VA, WA, WV, WI,

Schedule G (Form 990 or 990-EZ) 2014

**Part II Fundraising Events.** Complete if the organization answered "Yes" to 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 (event type)	(b) Event #2 (event type)	(c) Other events (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts . . . . .				
	2 Less: Contributions . . . . .				
	3 Gross income (line 1 minus line 2). . . . .				
	4 Cash prizes . . . . .				
	5 Noncash prizes . . . . .				
Direct Expenses	6 Rent/facility costs . . . . .				
	7 Food and beverages . . . . .				
	8 Entertainment . . . . .				
	9 Other direct expenses . . . . .				
	10 Direct expense summary. Add lines 4 through 9 in column (d) . . . . .				►
	11 Net income summary. Subtract line 10 from line 3, column (d) . . . . .				►

**Part III Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue . . . . .				
Direct Expenses	2 Cash prizes . . . . .				
	3 Noncash prizes . . . . .				
	4 Rent/facility costs . . . . .				
	5 Other direct expenses . . . . .				
	6 Volunteer labor . . . . .	Yes _____ % No	Yes _____ % No	Yes _____ % No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) . . . . .				►
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) . . . . .				►

9 Enter the state(s) in which the organization conducts gaming activities:

a Is the organization licensed to conduct gaming activities in each of these states? . . . . .  Yes  No  
 b If "No," explain: \_\_\_\_\_

10 a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? . . . . .  Yes  No  
 b If "Yes," explain: \_\_\_\_\_

## Schedule G (Form 990 or 990-EZ) 2014

11 Does the organization conduct gaming activities with nonmembers? . . . . .  Yes  No

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? . . . . .  Yes  No

13 Indicate the percentage of gaming activity conducted in:

a The organization's facility . . . . .	13a	%
b An outside facility . . . . .	13b	%

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

15 a Does the organization have a contract with a third party from whom the organization receives gaming revenue? . . . . .  Yes  No

b If "Yes," enter the amount of gaming revenue received by the organization ► \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ► \$ \_\_\_\_\_.

c If "Yes," enter name and address of the third party:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

## 16 Gaming manager information:

Name ► \_\_\_\_\_

Gaming manager compensation ► \$ \_\_\_\_\_

Description of services provided ► \_\_\_\_\_

 Director/officer  Employee  Independent contractor

## 17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? . . . . .  Yes  No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanation required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information (see instructions).

PART I, LINE 2B

ALLEGIANCE CREATIVE PROVIDES STRATEGIC GUIDANCE AND DIRECTION INCLUDING

CREATIVE DEVELOPMENT FOR AFI'S DIRECT RESPONSE CAMPAIGNS.

**SCHEDULE I**  
(Form 990)

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

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

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number  
20-8817225

► Information about Schedule I (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

► Attach to Form 990.

**Part I General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) AIRCRAFT OWNERS & PILOTS ASSOCIATION 421 AVIATION WAY FREDERICK, MD 21701	52-0636210	501C4	190,000.				AOPA LIVE
(2) AIRCRAFT OWNERS & PILOTS ASSOCIATION 421 AVIATION WAY FREDERICK, MD 21701	52-0636210	501C4	110,000.				AV8RS YOUTH PROGRAM GUIDES
(3) AIRCRAFT OWNERS & PILOTS ASSOCIATION 421 AVIATION WAY FREDERICK, MD 21701	52-0636210	501C4	786,000.				ASN
(4) AIRCRAFT OWNERS & PILOTS ASSOCIATION 421 AVIATION WAY FREDERICK, MD 21701	52-0636210	501C4	239,000.				AIRSHOW OUTREACH
(5) AIRCRAFT OWNERS & PILOTS ASSOCIATION 421 AVIATION WAY FREDERICK, MD 21701	52-0636210	501C4	75,000.				FT PROGRAM
(6) AIRCRAFT OWNERS & PILOTS ASSOCIATION 421 AVIATION WAY FREDERICK, MD 21701	52-0636210	501C4	105,000.				PILOT COMMUNITY
(7) AIR SERV INTERNATIONAL 410 ROSEDALE COURT WARRENTON, VA 20186	95-4371720	501C3	10,000.				HUMANITARIAN
(8) AVIATION ADVENTURES 100 AIRPORT ROAD TAVERNIER, FL 33070	26-4069578	501C3	10,000.				YOUTH
(9) CAVU 941 W. BYRD STREET UNIVERSAL CITY, TX 78148	75-2559486	501C3	10,000.				CONSERVATION
(10) GREAT EASTERN BALLOON ASSOCIATION PO BOX 828 FORKED RIVER, NJ 08731	36-4627726	501C3	10,000.				SAFETY
(11) NEW YORK CITY CIVIL AIR PATROL 25 MARLBORO PLACE BELLMORE, NY 11710	39-1743795	501C3	10,000.				YOUTH
(12) OPERATION MIGRATION 1623 MILITARY ROAD NIAGARA FALLS, NY 14304	27-1809824	501C3	10,000.				CONSERVATION

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

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

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

Schedule I (Form 990) (2014)

JSA

4E1288 1000  
35880V 649C

**SCHEDULE I**  
(Form 990)

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

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

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number  
20-8817225

► Attach to Form 990.

► Information about Schedule I (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**Part I General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? .....  Yes  No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) PATIENT AIRLIFT SERVICES 120 ADAMS BLVD FARMINGDALE, NY 11735	84-0852104	501C3	10,000.				HUMANITARIAN
(2) SCAPA DISASTER AIRLIFT RESPONSE TEAM PO BOX 1410 SAN MARTIN, CA 95046	26-3754228	501C3	10,000.				DISASTER RELIEF
(3) TIGERFLIGHT FOUNDATION 304 RUSSELL FIELD ROAD PCME, GA 30165	42-1613294	501C3	10,000.				YOUTH
(4) WINGS OVER THE ROCKIES AIR AND SPACE MUSEUM 8001 S. INTERPORT BLVD. ENGLEWOOD, CO 80112	20-4367769	501C3	10,000.				YOUTH
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

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

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

Schedule I (Form 990) (2014)

25A

4E1208 1000  
35880V 649C

THE AOPA FOUNDATION, INC.

20-8817225

Schedule I (Form 990) (2014)

Page 2

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

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

**Part IV Supplemental Information.** Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

PART I, LINE 2

THE AOPA FOUNDATION (FOUNDATION) HAS WRITTEN PROCEDURES FOR REQUESTING FUNDING. THE REQUEST FOR FUNDING MUST CONFORM TO, AND FOSTER THE PURPOSES SET FORTH IN THE FOUNDATION'S ARTICLES OF INCORPORATION. ALL ORGANIZATIONS AWARDED GRANTS BY THE FOUNDATION MUST COMPLETE AND RETURN, UPON COMPLETION OF THE PROJECT, A FINAL REPORT DETAILING AND ACCOUNTING FOR HOW THE GRANT FUNDS WERE SPENT. GRANT FUNDS MAY ONLY BE SPENT IN FURTHERANCE OF THE PROJECT DOCUMENTED ON THE GRANT APPLICATION. ANY UNUSED FUNDS MUST BE RETURNED.

Schedule I (Form 990) (2014)

JSA  
4E1504 8.000  
35880V 649C

**SCHEDULE J**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**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.

► Information about Schedule J (Form 990) and its Instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number

20-8817225

**Part I Questions Regarding Compensation**

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

<input checked="" type="checkbox"/> First-class or charter travel	<input type="checkbox"/> Housing allowance or residence for personal use
<input checked="" type="checkbox"/> Travel for companions	<input type="checkbox"/> Payments for business use of personal residence
<input type="checkbox"/> Tax indemnification and gross-up payments	<input type="checkbox"/> Health or social club dues or initiation fees
<input type="checkbox"/> Discretionary spending account	
<input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)	

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

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

**3** Indicate which, if any, of the following filing 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.

<input checked="" type="checkbox"/> Compensation committee	<input type="checkbox"/> Written employment contract
<input checked="" type="checkbox"/> Independent compensation consultant	<input type="checkbox"/> Compensation survey or study
<input checked="" type="checkbox"/> Form 990 of other organizations	<input type="checkbox"/> Approval by the board or compensation committee

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

**a** Receive a severance payment or change-of-control payment? . . . . .  
**b** Participate in, or receive payment from, a supplemental nonqualified retirement plan? . . . . .  
**c** Participate in, or receive payment from, an equity-based compensation arrangement? . . . . .

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

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

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

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

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

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

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

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

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

	Yes	No
<b>1b</b>	X	
<b>2</b>	X	
<b>4a</b>		X
<b>4b</b>	X	
<b>4c</b>		X
<b>5a</b>		X
<b>5b</b>		X
<b>6a</b>		X
<b>6b</b>		X
<b>7</b>	X	
<b>8</b>		X
<b>9</b>		

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

Schedule J (Form 990) 2014

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

For each individual whose compensation must be reported in 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 are not listed on Form 990, Part VII.

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

(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred in prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
KENNETH M. MEAD 1 EVP & GENERAL COUNSEL	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
TIMOTHY J. FORTUNE 2 CHIEF ADMINISTRATIVE OFFICER	(i) 378,283.	(ii) 97,912.	(iii) 13,524.	(C) 19,630.	(D) 2,522.	(E) 511,871.	(F) 0
CRAIG L. FULLER 3 FORMER CEO	(i) 243,550.	(ii) 46,135.	(iii) 4,309.	(C) 19,101.	(D) 10,815.	(E) 323,910.	(F) 0
HARVEY W. COHEN 4 CHIEF DEVELOPMENT OFFICER	(i) 71,556.	(ii) 0	(iii) 397,845.	(C) 0	(D) 0	(E) 469,401.	(F) 397,845.
BRUCE S. LANDSBERG 5 PRESIDENT (THROUGH 12/31/14)	(i) 117,666.	(ii) 35,979.	(iii) 7,014.	(C) 6,093.	(D) 7,006.	(E) 173,758.	(F) 0
MARK R. BAKER 6 CHIEF EXECUTIVE OFFICER	(i) 270,421.	(ii) 52,415.	(iii) 14,099.	(C) 19,630.	(D) 12,749.	(E) 369,314.	(F) 0
ERICA J. SACCOIA 7 SVP FINANCE	(i) 608,480.	(ii) 108,000.	(iii) 25,522.	(C) 19,630.	(D) 21,070.	(E) 782,702.	(F) 0
STEPHANIE L. KENYON 8 VP STRATEGIC PHILANTHROPY	(i) 194,415.	(ii) 27,216.	(iii) 3,397.	(C) 15,699.	(D) 1,523.	(E) 242,250.	(F) 0
9	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
10	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
11	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
12	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
13	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
14	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
15	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0
16	(i) 0	(ii) 0	(iii) 0	(C) 0	(D) 0	(E) 0	(F) 0

**Part III Supplemental Information**

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

**PART I, LINE 1A**

CERTAIN DIRECTORS AND OFFICERS RECEIVED FIRST CLASS AIR TRAVEL, AND TRAVEL FOR COMPANIONS. IT IS THE ORGANIZATION'S POLICY TO TREAT THE ABOVE ITEMS AS TAXABLE COMPENSATION AND REPORT THE APPLICABLE AMOUNTS TO THE IRS ON FORM W-2 OR FORM 1099-MISC. FOR THE APPLICABLE TAX YEAR.

**PART II, COMPENSATION INFORMATION**

THE COMPENSATION LEVELS AND SALARY RANGES FOR OFFICERS AND CERTAIN EMPLOYEES OF THE ORGANIZATION ARE ESTABLISHED BASED ON COMPETITIVE MARKET DATA OBTAINED THROUGH PERIODIC SALARY SURVEYS PERFORMED BY OUTSIDE COMPENSATION EXPERTS ENGAGED BY THE ORGANIZATION. THESE SURVEYS PROVIDE GUIDANCE FOR ESTABLISHING REASONABLE COMPENSATION RATES AS COMPARED TO COMPENSATION PAID BY SIMILARLY SITUATED ORGANIZATIONS FOR POSITIONS OF SIMILAR SCOPE OF RESPONSIBILITY. ALL POSITIONS ARE EVALUATED AND PLACED IN THE APPROPRIATE GRADES/SALARY RANGES. AN INDIVIDUAL EMPLOYEE'S SALARY, WITHIN THEIR ASSIGNED RANGE, VARIES DEPENDING PRIMARILY UPON EXPERIENCE AND PERFORMANCE. THE ORGANIZATION HAS ADOPTED A "PAY FOR PERFORMANCE" PHILOSOPHY ALLOWING MANAGERS TO AWARD MERIT INCREASES BASED ON AN INDIVIDUAL'S PERFORMANCE AGAINST PRE-ESTABLISHED GOALS. THE

**Part III Supplemental Information**

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

ORGANIZATION'S ANNUAL MERIT INCREASE BUDGET IS APPROVED BY THE BOARD OF TRUSTEES BASED ON MARKET SURVEYS. OFFICERS AND CERTAIN EMPLOYEES ALSO PARTICIPATE IN THE ORGANIZATION'S INCENTIVE PAY PROGRAM.

PART I, LINE 7: TARGET INCENTIVE PAY AMOUNTS, AS A PERCENTAGE OF BASE SALARY, ARE ESTABLISHED BASED ON THE PARTICIPANT'S POSITION. THE ACTUAL INCENTIVE PAY AWARDED IS PROPOSED BY THE EXECUTIVE MANAGEMENT TEAM AND THE PRESIDENT BASED ON THEIR ASSESSMENT OF THE PARTICIPANT'S INDIVIDUAL PERFORMANCE AND THAT OF THE ORGANIZATION AGAINST PRE-ESTABLISHED GOALS. THE BOARD OF TRUSTEES AND COMPENSATION COMMITTEE REVIEW AND MAKE A FINAL DETERMINATION AS TO THE ACTUAL INCENTIVE AWARDS PAID TO PARTICIPANTS. ALL PERSONS MENTIONED ABOVE DO NOT PARTICIPATE IN THE DELIBERATION OF THEIR COMPENSATION ARRANGEMENT. THE DELIBERATIONS AND DECISIONS OF THESE COMPENSATION ARRANGEMENTS ARE MAINTAINED IN CONTEMPORANEOUS DOCUMENTATION WITH OUR HUMAN RESOURCES DEPARTMENT.

THE AOPA FOUNDATION, INC.

20-8817225

Schedule J (Form 990) 2014

Page 3

**Part III Supplemental Information**

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

CERTAIN INDIVIDUALS LISTED ON THIS RETURN ON SCHEDULE J, PART II,

ROW (II) FROM RELATED ORGANIZATION(S) ARE NOT COMPENSATED FROM THE FOUNDATION.

CRAIG FULLER, FORMER PRESIDENT RECEIVED A PAYOUT OF HIS PREVIOUSLY EARNED ACCRUED LEAVE OF \$71,556 AND HAD A BOARD APPROVED CONSULTING AGREEMENT TO ASSIST IN THE TRANSITION OF \$397,845 WHICH WAS ACCRUED IN 2013 AND PAID IN 2014 AND IS INCLUDED IN THE \$469,401. LINE 4B IS ANSWERED YES DUE TO CRAIG FULLER RECEIVED A DISTRIBUTION FROM HIS 457B PLAN.

Schedule J (Form 990) 2014

JSA  
4E1505 1.000  
35880V 649C

**SCHEDULE M**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

OMB No. 1545-0047

**2014**

Open To Public  
Inspection

Name of the organization

THE AOPA FOUNDATION, INC.

Employer identification number

20-8817225

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art . . . . .				
2 Art - Historical treasures . . . . .				
3 Art - Fractional interests . . . . .				
4 Books and publications . . . . .				
5 Clothing and household goods . . . . .				
6 Cars and other vehicles . . . . .				
7 Boats and planes . . . . .	X	4.	61,500.	SELLING PRICE
8 Intellectual property . . . . .				
9 Securities - Publicly traded . . . . .	X	9.	78,737.	SELLING PRICE
10 Securities - Closely held stock . . . . .				
11 Securities - Partnership, LLC, or trust interests . . . . .				
12 Securities - Miscellaneous . . . . .				
13 Qualified conservation contribution - Historic structures . . . . .				
14 Qualified conservation contribution - Other . . . . .				
15 Real estate - Residential . . . . .				
16 Real estate - Commercial . . . . .				
17 Real estate - Other . . . . .				
18 Collectibles . . . . .				
19 Food inventory . . . . .				
20 Drugs and medical supplies . . . . .				
21 Taxidermy . . . . .				
22 Historical artifacts . . . . .				
23 Scientific specimens . . . . .				
24 Archeological artifacts . . . . .				
25 Other ►( ATCH 1 ) . . . . .		40.	99,189.	
26 Other ►( ) . . . . .				
27 Other ►( ) . . . . .				
28 Other ►( ) . . . . .				
29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement . . . . .	29			1.

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period? . . . . .	30a	X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions? . . . . .	31	X
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? . . . . .	32a	X
b If "Yes," describe in Part II.		
33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

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

Schedule M (Form 990) (2014)

JSA

4E1298 1.000

35880V 649C

**Part II Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

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**ONLINE AUCTION**

THE AOPA FOUNDATION, INC. USES AN ONLINE SERVICE PROVIDER TO HOST AN ONLINE AUCTION. THE ONLINE AUCTION SERVICE PROVIDES TRAINING, SUPPORT, SERVICES AND ACCESS TO SOFTWARE TO FACILITATE AFI'S ONLINE AUCTION NEEDS.

**Part II Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

ATTACHMENT 1SCHEDULE M, PART I - OTHER NONCASH CONTRIBUTIONS

<u>DESCRIPTION</u>	<u>(A) CHECK</u>	<u>(B) NUMBER OF CONTRIBUTIONS</u>	<u>(C) REVENUES REPORTED</u>	<u>(D) METHOD OF DETERMINING</u>
VARIOUS AUCTION ITEMS	X	40.	99,189.	SELLING PRICE
<b>TOTALS</b>		<b>40.</b>	<b>99,189.</b>	

## **Supplemental Information to Form 990 or 990-EZ**

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

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Employer identification number

20-8817225

### PART VI, SECTION A, LINE 6

THE AOPA FOUNDATION'S BYLAWS STATE THE MEMBERS SHALL BE THOSE PERSONS

WHO, FROM TIME TO TIME, CONSTITUTE THE BOARD OF TRUSTEES OF AIRCRAFT

OWNERS & PILOTS ASSOCIATION, A NON PROFIT NEW JERSEY CORPORATION.

WHENEVER ANY PERSON SHALL CEASE TO BE A MEMBER OF THE BOARD OF TRUSTEES

OF SAID ASSOCIATION, FOR ANY REASON, HE SHALL CONTEMPORANEOUSLY CEASE TO

BE A MEMBER OF THIS FOUNDATION, AND HIS SUCCESSOR UPON THE BOARD OF

TRUSTEES OF SAID ASSOCIATION SHALL FORTHWITH BECOME A MEMBER OF THIS

FOUNDATION.

### PART VI, SECTION B, LINES 11A & 11B

IN CONJUNCTION WITH GRANT THORNTON LLP TAX SPECIALISTS, AOPA FOUNDATION

MANAGEMENT REVIEWS THE FORM 990 WITH THE AUDIT COMMITTEE PRIOR TO

PRESENTING THE RETURN TO OUR BOARD OF TRUSTEES FOR REVIEW.

### PART VI, SECTION B, LINE 12C

THE AOPA FOUNDATION'S BOARD IS PROVIDED A WRITTEN "CODE OF ETHICS,

CONFLICT OF INTEREST QUESTIONNAIRE AND DISCLOSURE FORM" ("FORM"). THE

FORM REQUIRES PERSONS COVERED (OFFICERS, DIRECTORS, TRUSTEES AND KEY

EMPLOYEES) TO ANNUALLY DISCLOSE AND UPDATE THE FORM AND PROVIDE TO LEGAL

COUNSEL INTERESTS THAT COULD GIVE RISE TO CONFLICT(S). LEGAL COUNSEL

REVIEWS THE ANNUAL DISCLOSURES BY ALL COVERED PERSONS. DISCLOSURES ARE

REGULARLY MONITORED BY COUNSEL, ANY POTENTIALLY CONFLICTING OR OTHERWISE

QUESTIONABLE RESPONSES ARE FLAGGED AND THE ETHICS POLICY IS ENFORCED.

Name of the organization

THE AOPA FOUNDATION, INC.

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## PART VI, SECTION B, LINES 15A &amp; 15B

THE COMPENSATION FOR THE PRESIDENT IS SET BY THE BOARD OF TRUSTEES AND COMPENSATION COMMITTEE. THE BASE SALARY FOR THIS POSITION MAY BE ADJUSTED BY THE BOARD FROM TIME TO TIME AT ITS SOLE DISCRETION. THE PRESIDENT IS ALSO CONSIDERED ANNUALLY BY THE BOARD FOR AN INCENTIVE BONUS WHICH IS A TARGET PERCENT OF BASE SALARY. THE ACTUAL BONUS PAID IS DETERMINED BY THE BOARD BASED ON ITS ASSESSMENT OF THE PRESIDENT'S PERFORMANCE AND THAT OF THE ORGANIZATION AGAINST APPROPRIATE GOALS SET BY THE COMPENSATION, ORGANIZATION, AND HUMAN RESOURCES COMMITTEE AND THE PRESIDENT. PERIODIC INDEPENDENT REVIEWS OF THE PRESIDENT'S COMPENSATION ARE CONDUCTED BY OUTSIDE COMPENSATION EXPERTS TO ENSURE THAT THE COMPENSATION PAID IS REASONABLE BASED ON APPROPRIATE DATA AS TO COMPARABILITY OF COMPENSATION PAID BY SIMILAR ORGANIZATIONS FOR POSITIONS OF SIMILAR SCOPE OF RESPONSIBILITY. THE COMPENSATION LEVELS AND SALARY RANGES FOR OFFICERS AND CERTAIN EMPLOYEES OF THE ORGANIZATION ARE ESTABLISHED BASED ON COMPETITIVE MARKET DATA OBTAINED THROUGH PERIODIC SALARY SURVEYS PERFORMED BY OUTSIDE COMPENSATION EXPERTS ENGAGED BY THE ORGANIZATION. THESE SURVEYS PROVIDE GUIDANCE FOR ESTABLISHING REASONABLE COMPENSATION RATES AS COMPARED TO COMPENSATION PAID BY SIMILARLY SITUATED ORGANIZATIONS FOR POSITIONS OF SIMILAR SCOPE OF RESPONSIBILITY. ALL POSITIONS ARE EVALUATED AND PLACED IN THE APPROPRIATE GRADES/SALARY RANGES. AN INDIVIDUAL EMPLOYEE'S SALARY, WITHIN THEIR ASSIGNED RANGE, VARIES DEPENDING PRIMARILY UPON EXPERIENCE AND PERFORMANCE. THE ORGANIZATION HAS ADOPTED A "PAY FOR PERFORMANCE" PHILOSOPHY ALLOWING MANAGERS TO AWARD MERIT INCREASES BASED ON AN INDIVIDUAL'S PERFORMANCE AGAINST PRE-ESTABLISHED GOALS. THE ORGANIZATION'S ANNUAL MERIT INCREASE

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BUDGET IS APPROVED BY THE BOARD OF TRUSTEES BASED ON MARKET SURVEYS. OFFICERS AND CERTAIN EMPLOYEES ALSO PARTICIPATE IN THE ORGANIZATION'S INCENTIVE PAY PROGRAM. TARGET INCENTIVE PAY AMOUNTS, AS A PERCENTAGE OF BASE SALARY, ARE ESTABLISHED BASED ON THE PARTICIPANT'S POSITION. THE ACTUAL INCENTIVE PAY AWARDED IS PROPOSED BY THE EXECUTIVE MANAGEMENT TEAM AND THE PRESIDENT BASED ON THEIR ASSESSMENT OF THE PARTICIPANT'S INDIVIDUAL PERFORMANCE AND THAT OF THE ORGANIZATION AGAINST PRE-ESTABLISHED GOALS. THE BOARD OF TRUSTEES AND COMPENSATION COMMITTEE REVIEW AND MAKE A FINAL DETERMINATION AS TO THE ACTUAL INCENTIVE AWARDS PAID TO PARTICIPANTS. NONE OF THE PERSONS MENTIONED ABOVE PARTICIPATE IN THE DELIBERATION OF THEIR COMPENSATION ARRANGEMENT. THE DELIBERATIONS AND DECISIONS OF THESE COMPENSATION ARRANGEMENTS ARE MAINTAINED IN CONTEMPORANEOUS DOCUMENTATION WITH OUR HUMAN RESOURCES DEPARTMENT.

PART VI, SECTION C, LINES 18 & 19

THE ORGANIZATION DOES MAKE AVAILABLE ITS CONFLICT OF INTEREST POLICY, FINANCIAL STATEMENTS, FORM 990 RETURNS, AND FORM 1023 TO THE GENERAL PUBLIC. THE ORGANIZATION MAKES AVAILABLE ITS GOVERNING DOCUMENTS TO THE EXTENT REQUIRED BY LAW. THE PUBLIC CAN RECEIVE COPIES BY CONTACTING THE ORGANIZATION'S HEADQUARTERS. COPIES OF THE RETURNS CAN BE OBTAINED AT [WWW.AOPA.ORG/ABOUT-AOPA/GOVERNANCE](http://WWW.AOPA.ORG/ABOUT-AOPA/GOVERNANCE) AND [WWW.GUIDESTAR.ORG](http://WWW.GUIDESTAR.ORG).

PART VII, HOURS WORKED FOR THE AOPA FOUNDATION INC.

MARK BAKER, KENNETH MEAD, TIMOTHY FORTUNE, AND ERICA SACCOIA ARE FULL-TIME EMPLOYEES OF AIRCRAFT OWNERS & PILOTS ASSOCIATION (AOPA), A RELATED, SECTION 501(C)(4) ORGANIZATION (EIN 52-0636210). THEY DEVOTE

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SOME OF THEIR (40+ HOURS/WEEK) POSITION AT AOPA TO WORK FOR THE AOPA FOUNDATION, INC.

PART VI, SECTION A, LINE 2

THERE ARE TWO TRUSTEES (MR. TRIMBLE AND MR. CRATE) WHO HAVE A BUSINESS RELATIONSHIP OUTSIDE OF AFI. THESE TWO TRUSTEES ARE PARTNERS IN THE SAME COMPANY.

ATTACHMENT 1

FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION

TO PROMOTE, ADVANCE AND ENCOURAGE AVIATION AND AIRPORT SAFETY AND SECURITY AND THE RESEARCH AND TESTING IN THE SUPPORT THEREOF; TO EDUCATE THE PUBLIC AND USERS OF THE NATIONAL AIR TRANSPORTATION SYSTEM TO THE VALUE AND IMPORTANCE OF GENERAL AVIATION TO THE NATIONAL AIR TRANSPORTATION SYSTEM; TO ENCOURAGE AND SUPPORT THE FLIGHT TRAINING OF PILOTS TO ASSURE THE FUTURE OF GENERAL AVIATION AS AN IMPORTANT COMPONENT OF THE NATIONAL AIR SYSTEM; TO LESSEN THE BURDENS OF FEDERAL, STATE AND LOCAL GOVERNMENTS IN CONNECTION WITH THE MAINTENANCE AND ADVANCEMENT OF GENERAL AVIATION, AND AVIATION AND AIRPORT SAFETY AND SECURITY; AND TO ASSIST OTHER CHARITABLE AND OTHER ORGANIZATIONS IN THE CONDUCT OF SIMILAR ACTIVITIES TO THE EXTENT THAT SUCH ACTIVITIES ARE IN THE FURTHERANCE OF CHARITABLE, EDUCATIONAL AND/OR SCIENTIFIC PURPOSES.

ATTACHMENT 2

FORM 990, PART III - PROGRAM SERVICE, LINE 4A

THE AOPA FOUNDATION (AFI) IS A TAX-EXEMPT CHARITABLE, EDUCATIONAL, AND SCIENTIFIC ORGANIZATION THAT EDUCATES THE PUBLIC ABOUT THE

Name of the organization

THE AOPA FOUNDATION, INC.

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## ATTACHMENT 2 (CONT'D)

VALUE OF GENERAL AVIATION. OUR MISSION IS TO ENSURE THE FUTURE OF GENERAL AVIATION BY IMPROVING SAFETY, PRESERVING COMMUNITY AIRPORTS, AND ENCOURAGING LEARNING TO FLY FOR CAREER AND PERSONAL BENEFIT.

FOR THE YEAR ENDING 2014, THE AOPA FOUNDATION'S EDUCATIONAL OUTREACH WAS THROUGH APPROXIMATELY 2,000,000 POINTS OF CONTACTS VIA ONLINE COURSES (124,390), ACCIDENT CASE STUDIES (80,261), REAL PILOT STORIES (37,320), QUIZZES (200,859), A BLOG (185,976), QUARTERLY NEWSLETTER FOR FLIGHT INSTRUCTORS (153,417), DOWNLOADED PUBLICATIONS (23,227), ACCIDENT DATABASE AND ACCIDENT MAPS (97,543), VIDEOS (1,035,589), LIVE SAFETY SEMINARS, WEBINARS, AND RECORDED WEBINAR VIEWS (40,321), IN-PERSON AND ONLINE FLIGHT INSTRUCTOR REFRESHER COURSES (8,985), MOBILE FLIGHT RISK EVALUATOR DOWNLOADS (12,043), AND DOWNLOADED SEMINAR KITS AND VIDEOS (2,226).

INTERACTIVE COURSES ARE PROVIDED FREE OF CHARGE TO ALL PILOTS AND AVIATION ENTHUSIASTS AND ARE EXTREMELY EASY TO USE. ONLINE COURSE COMPLETION TIMES RANGE FROM 20 TO 45 MINUTES, AND USERS CAN CONTROL THE PACE AND CAN SAVE THEIR PROGRESS AT ANY TIME, ALLOWING THEM TO WORK IN SHORT INCREMENTS TO COMPLETE A COURSE OVER MULTIPLE SESSIONS. SAFETY VIDEOS ARE ANYWHERE FROM TWO TO 30 MINUTES IN LENGTH.

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ATTACHMENT 2 (CONT'D)

IN 2014, THE AOPA FOUNDATION OFFERED 83 SAFETY QUIZZES, 38 INTERACTIVE ONLINE COURSES ON TOPICS SUCH AS VFR INTO IMC, RUNWAY SAFETY, DECISION MAKING, AERODYNAMICS, AND RADIO COMMUNICATIONS. IN ADDITION, 21 REAL PILOT STORIES, 21 SAFETY VIDEOS, 15 ASK ATC VIDEOS, 12 PILOT SAFETY ANNOUNCEMENTS, 11 WEBINARS, NINE ACCIDENT CASE STUDIES, AND 95 PUBLICATIONS WERE OFFERED. EACH EDUCATIONAL PRODUCT ENABLES PILOTS TO DEVELOP AND IMPROVE THEIR SAFETY KNOWLEDGE.

IN ADDITION, THE AOPA FOUNDATION'S WEBSITE OFFERS DOZENS OF PRESENTATIONS TO HELP PILOTS TAKE ADVANTAGE OF THE COLLECTIVE WISDOM OF THE GA COMMUNITY. THESE INCLUDE A COMPREHENSIVE DATABASE OF NATIONAL TRANSPORTATION SAFETY BOARD ACCIDENT REPORTS FROM 1983 THROUGH THE PRESENT. PROVIDING THIS MATERIAL HELPS PILOTS LEARN FROM THE MISTAKES OF OTHERS. SIMILARLY, REAL PILOT STORIES OFFER DETAILED FIRST-PERSON ACCOUNTS OF THE CHALLENGES PILOTS HAVE FACED, THE MISTAKES THEY HAVE MADE, AND WHAT THEY HAVE LEARNED FROM THOSE EXPERIENCES. THE AOPA FOUNDATION ALSO CREATES SPECIAL REPORTS FROM HIGH-PROFILE OR COMMON ACCIDENTS TO HELP PILOTS AVOID THE SITUATIONS THAT CAN LEAD TO DISASTER.

OTHER PRESENTATIONS AVAILABLE ON THE WEBSITE INCLUDE THE

FOLLOWING, AND MANY MORE:

\*SURVIVE: BEYOND THE FORCED LANDING - THIS TWO-PART PROJECT (VIDEO AND PUBLICATION) COVERS IMPORTANT ITEMS PILOTS SHOULD PACK IN

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ATTACHMENT 2 (CONT'D)

THEIR SURVIVAL KITS AND WHAT ACTIONS THEY CAN TAKE TO KEEP THEMSELVES AND THEIR PASSENGERS SAFE UNTIL HELP ARRIVES.

\*DATALINK: FROM CONCEPT TO COCKPIT - A VIDEO THAT INCLUDES A BEHIND-THE-SCENES LOOK AT THE "DATALINK REVOLUTION" AS TOLD BY THE PEOPLE WHO MADE IT HAPPEN.

\*WEATHER WISE: VFR INTO IMC - THIS COURSE COVERS THE BASIC WEATHER KNOWLEDGE PILOTS NEED TO KNOW TO AVOID FLYING VISUAL FLIGHT RULES (VFR) INTO INSTRUMENT METEOROLOGICAL CONDITIONS (IMC).

\*ACCIDENT CASE STUDY: COMMUNICATION BREAKDOWN - THIS VIDEO RE-CREATES AN ACCIDENT AND RECONNECTS THE LINKS OF THE ACCIDENT CHAIN, TO PROVIDE LESSONS THAT PILOTS CAN LEARN FROM THE TRAGEDY.

\*TAKEOFF AND LANDING VIDEOS - THIS SERIES OF VIDEOS ADDRESSES AREAS IN WHICH A HIGH NUMBER OF ACCIDENTS OCCUR EACH YEAR - THE TAKEOFF AND LANDING PHASES OF FLIGHT. EACH VIDEO OFFERS A CONCISE OVERVIEW OF ONE SEGMENT OF A TAKEOFF OR LANDING, DISCUSSES COMMON PROBLEM AREAS, AND OFFERS EXPERT COMMENTS ABOUT HOW TO FLY SAFELY DURING THOSE PHASES.

\*PUBLIC BENEFIT FLYING - A PRESENTATION DESIGNED TO INCREASE THE SAFETY CULTURE OF VOLUNTEER PILOT FLYING.

\*ADS-B FOR GENERAL AVIATION: THE BASICS - THIS PRESENTATION HELPS CLARIFY WHAT THIS NEW TECHNOLOGY WILL MEAN FOR GA PILOTS AND THE WAY THEY FLY. IT DISCUSSES WHAT ADS-B IS, ITS BENEFITS, AND WHAT A PILOT SHOULD KNOW BEFORE MAKING ANY CHANGES TO THEIR AIRCRAFT.

\*CRITICAL INFORMATION: THE PASSENGER SAFETY BRIEFING - THIS VIDEO COVERS OFTEN-OVERLOOKED ITEMS THAT SHOULD BE PART OF EVERY

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ATTACHMENT 2 (CONT'D)

PREFLIGHT PASSENGER BRIEFING. PILOTS ALSO GET HELPFUL SURVIVAL TIPS FROM NTSB AND CAP EXPERTS, AND LEARN THE SINGLE BEST WAY TO INCREASE THEIR ODDS OF RESCUE.

\*UNMANNED AIRCRAFT AND THE NATIONAL AIRSPACE SYSTEM - THIS COURSE GOES BEHIND THE SCENES OF UAS OPERATIONS AND EXPLORE VARIOUS SCENARIOS TO ILLUSTRATE HOW GA AIRPLANES AND UAS CAN SAFELY COEXIST IN THE NATIONAL AIRSPACE SYSTEM.

\*AGING GRACEFULLY, FLYING SAFELY - THIS COURSE DISCUSSES HOW GETTING OLDER IMPACTS A PILOT'S PERFORMANCE AND HOW THEY CAN ADJUST.

\*IFR INSIGHTS: COCKPIT WEATHER - THIS COURSE TAKES A PRACTICAL LOOK AT COCKPIT WEATHER PRODUCTS AND HOW THEY FIT INTO A PILOT'S DECISION MAKING PROCESS.

\*KNOW BEFORE YOU GO: NAVIGATING TODAY'S AIRSPACE - THIS COMPREHENSIVE COURSE COVERS EVERYTHING A PILOT NEED'S TO KNOW TO KEEP THEIR CERTIFICATE SAFE.

\*ACCIDENT STATISTICS - GRAPHICAL REPRESENTATIONS OF THE LATEST STATISTICAL DATA AVAILABLE FROM THE FAA AND NTSB.

\*SAFETY QUIZZES - A QUICK, EASY, AND INTERACTIVE WAY FOR PILOTS TO ASSESS AND EXPAND THEIR KNOWLEDGE OF DOZENS OF AVIATION SUBJECTS, INCLUDING WEATHER; AIRPORT LIGHTING; IFR AND VFR FLYING; STALLS AND SPINS; COLLISION AVOIDANCE; CHARTS; EMERGENCY PROCEDURES; MOUNTAIN FLYING; SPATIAL DISORIENTATION; PREVENTIVE MAINTENANCE; WAKE TURBULENCE; SPECIAL USE AIRSPACE; AND MANY MORE.

Name of the organization

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ATTACHMENT 2 (CONT'D)

THE AOPA FOUNDATION ALSO HOSTS APPROXIMATELY 200 IN-PERSON, FREE SAFETY SEMINARS NATIONWIDE EACH YEAR. THESE LIVE SEMINARS QUALIFY FOR THE FAA WINGS PROGRAM AND CAN HELP PILOTS QUALIFY FOR AVIATION ACCIDENT FORGIVENESS PROGRAMS THROUGH SEVERAL INSURANCE COMPANIES.

THE AOPA FOUNDATION ALSO CREATES PILOT SAFETY ANNOUNCEMENTS (PSAS). FOLLOWING THE MODEL OF TELEVISED PUBLIC SERVICE ANNOUNCEMENTS, THESE SHORT VIDEOS RAISE AWARENESS OF COMMON ACCIDENT CAUSES, OFTEN WITH A PINCH OF TONGUE-IN-CHEEK HUMOR TO KEEP PILOTS WATCHING AND MAKE THE MESSAGE MEMORABLE. EACH OF THE NINE AVAILABLE PSAS INCLUDES RESOURCES AND TIPS TO HELP PILOTS AVOID ACCIDENTS.

FOR CERTIFIED FLIGHT INSTRUCTORS (CFIS), THE AOPA FOUNDATION OFFERS BOTH IN-PERSON AND ONLINE RENEWAL PROGRAMS CALLED FLIGHT INSTRUCTOR REFRESHER COURSES (FIRCS). THE IN-PERSON WEEKEND COURSES ARE AVAILABLE IN 85 LOCATIONS AND BOTH THE IN-PERSON AND ONLINE CLASSES MEET THE FAA'S RENEWAL REQUIREMENTS.

FOR THOSE WHO WANT TO READ MORE ABOUT GA SAFETY, THE AOPA FOUNDATION OFFER A BROAD RANGE OF SAFETY PUBLICATIONS AND ARTICLES, BOTH IN PRINTED AND DOWNLOADABLE FORMATS. ALL OF THESE SAFETY PUBLICATIONS ARE AVAILABLE TO THE PUBLIC AT NO CHARGE. THEY INCLUDE:

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ATTACHMENT 2 (CONT'D)

\*SAFETY ADVISORS - FIND NEED-TO-KNOW INFORMATION AND A WEALTH OF PRACTICAL ADVICE IN THE AOPA FOUNDATION'S SAFETY ADVISORS. A VARIETY OF TOPICS ARE AVAILABLE, INCLUDING AIRSPACE, WEATHER, INSTRUMENT OPERATIONS, AND GPS.

\*SAFETY BRIEFS - SHORT (2-4 PAGE) PUBLICATIONS DESIGNED TO OFFER EXPERT GUIDANCE AND USEFUL TIPS FOR PILOTS.

\*JOSEPH T. NALL REPORT - THIS ACCLAIMED SAFETY REPORT PROVIDES ANALYSIS AND PERSPECTIVE TO THE PREVIOUS YEAR'S GENERAL AVIATION ACCIDENT STATISTICS.

\*ACCIDENTS DURING FLIGHT INSTRUCTION - THE AOPA FOUNDATION'S FIRST COMPREHENSIVE ANALYSIS OF INSTRUCTIONAL ACCIDENTS IN A DECADE FINDS SURPRISING DIFFERENCES BETWEEN DIFFERENT TYPES AND PHASES OF TRAINING IN BOTH AIRPLANES AND HELICOPTERS.

\*SPECIAL REPORTS - STRAIGHTFORWARD ANALYSIS, BASED ON ACCIDENT REPORTS IN THE AOPA FOUNDATION'S ACCIDENT DATABASE, OF CHALLENGES TO AVIATION SAFETY.

\*AIRSPACE AT-A-GLANCE CARD - KNOW AT A GLANCE WHAT THE WEATHER MINIMUMS AND COMMUNICATION REQUIREMENTS ARE FOR THE SURROUNDING AIRSPACE.

\*INTERCEPT PROCEDURES CARD - NOTAMS AND TFRS ARE MORE COMMON THAN EVER. THIS CARD REMINDS PILOTS OF WHAT TO DO IF AN F-16 POPS UP IN THEIR WINDOW.

\*FLIGHT PLANNER FORM - A GUIDE TO HELP WITH EFFICIENT AND COMPLETE FLIGHT PLANNING-READY FOR PILOTS TO PRINT AND USE.

\*RUNWAY FLASH CARDS - DESIGNED TO HELP PILOTS BETTER UNDERSTAND

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ATTACHMENT 2 (CONT'D)

RUNWAY SIGNAGE AND MARKINGS. THE FRONT OF EACH CARD DISPLAYS AN AIRPORT SIGN OR PAVEMENT MARKING, WHILE THE BACK PROVIDES A DESCRIPTION AND INFORMATION ON THE REQUIRED PILOT ACTION.

\*AIRSPACE FLASH CARDS - DESIGNED TO HELP PILOTS KEEP THE DIFFERENT TYPES OF AIRSPACE STRAIGHT. EACH CARD INCLUDES A COLOR DEPICTION OF THE AIRSPACE, A DESCRIPTION OF ITS CHARACTERISTICS, AND A DISCUSSION QUESTION.

\*AIRCRAFT FLASH CARDS - DESIGNED TO HELP NEW, SEASONED, AND TRANSITIONING PILOTS GAIN KNOWLEDGE OF AIRCRAFT SPEEDS, PROFILES, SYSTEMS, AND EMERGENCY PROCEDURES. EACH CARD INCLUDES A SUBJECT AREA ON THE FRONT, AND FILL-IN-THE-BLANK SPACES AND A HELPFUL TIP ON THE BACK.

\*FEATURED ACCIDENTS - AN ARCHIVE OF ACCIDENT REPORTS FEATURED IN AOPA EPILOT.

\*CFI TO CFI NEWSLETTERS - BOTH PILOTS AND INSTRUCTORS BENEFIT FROM THE AOPA FOUNDATION'S QUARTERLY NEWSLETTER TO INSTRUCTORS.

\*PILOT'S CHECKRIDE GUIDE - THIS BOOKLET IS DESIGNED TO PROVIDE PILOTS AND FLIGHT INSTRUCTORS WITH A COMPACT REFERENCE GUIDE TO FREQUENTLY USED PRACTICAL TEST STANDARDS AND LOGBOOK ENDORSEMENTS.

\*SPORT PILOT CHECKRIDE GUIDE - A COMPACT REFERENCE ON PRACTICAL TEST STANDARDS, ELIGIBILITY REQUIREMENTS, FLIGHT AND AERONAUTICAL EXPERIENCE REQUIREMENTS, AND REQUIRED ENDORSEMENT

\*ANNUAL REPORT - A REVIEW OF THE FOUNDATION'S PROGRESS AND ACCOMPLISHMENTS FOR THE YEAR.

Name of the organization

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ATTACHMENT 2 (CONT'D)

## FOUNDATION GRANTS

THE AOPA FOUNDATION RAISES FUNDS TO SUPPORT THE IMPORTANT WORK OF THE AIRCRAFT OWNERS AND PILOTS ASSOCIATION THAT DUES ALONE CANNOT SUPPORT. DURING 2014, THE AOPA FOUNDATION GRANTED \$1,605,000 TO VARIOUS PROJECTS AND ORGANIZATIONS IN SUPPORT OF ITS MISSION.

A WIDE VARIETY OF SAFETY EDUCATION IS PROVIDED COMPLETELY FREE OF CHARGE FOR PILOTS REGARDLESS OF WHETHER THEY ARE AOPA MEMBERS. THIS IS DONE WITH THE INTENT OF HELPING PILOTS EVERYWHERE FLY SAFELY.

IN 2014, THE AOPA FOUNDATION FUNDED THE POPULAR ONLINE BROADCAST OF AOPA LIVE THIS WEEK, PROVIDING \$190,000 TO PRODUCE AWARD-WINNING PROGRAMS FEATURING NEWS AND CURRENT EVENTS IN THE GENERAL AVIATION FIELD.

THE FOUNDATION ALSO PROVIDED MORE THAN \$400,000 TO SUPPORT POWERFUL PROGRAMS DESIGNED TO STRENGTHEN THE PILOT COMMUNITY. THIS INCLUDED RUSTY PILOTS, AN EDUCATIONAL WORKSHOP DESIGNED TO ENCOURAGE PILOTS TO RETURN TO FLYING; FLIGHT SCHOOL BUSINESS PROGRAM, WHICH STRENGTHENS FLIGHT SCHOOLS BY PROVIDING MARKETING AND NETWORKING TOOLS; AND FLIGHT TRAINING SCHOLARSHIPS AWARDED TO DESERVING STUDENT PILOTS.

THE AOPA AV8RS PROGRAM, DEVELOPED TO ENGAGE TEENS AND RAISE

Name of the organization

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ATTACHMENT 2 (CONT'D)

AWARENESS OF AVIATION AND AEROSPACE THROUGH EDUCATION, WAS SUPPORTED WITH A \$110,000 GRANT PROVIDED THROUGH THE AOPA FOUNDATION.

IN 2014, THE AOPA FOUNDATION HELPED SUPPORT NATIONAL EFFORTS TO PRESERVE AND PROTECT COMMUNITY AIRPORTS WITH A GRANT OF \$786,000. THE AOPA AIRPORTS TEAM WORKED ON ISSUES AFFECTING AIRPORTS AND OTHER LANDING FACILITIES, WHILE THE AIRPORT SUPPORT NETWORK VOLUNTEERS HELP KEEP AOPA INFORMED ABOUT THE ISSUES AFFECTING GENERAL AVIATION IN THEIR COMMUNITIES.

THE AOPA FOUNDATION'S GIVING BACK PROGRAM WAS ESTABLISHED TO SHINE A LIGHT ON THE GOOD WORK BEING DONE THROUGH GENERAL AVIATION AND TO PROVIDE SUPPORT TO THOSE INTERESTED IN AVIATION. TEN \$10,000 GRANTS WERE AWARDED TO NONPROFIT ORGANIZATIONS PERFORMING PUBLIC BENEFIT FLYING, AND HUMANITARIAN AND CHARITABLE WORK THROUGH GENERAL AVIATION.

ATTACHMENT 3FORM 990, PART V, LINE 4B - FOREIGN COUNTRIES

CAYMAN ISLANDS

BERMUDA

IRELAND

Name of the organization

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ATTACHMENT 4

FORM 990, PART VI, LINE 17 - STATES

AL, AK, AZ, AR, CA, CO, CT,

DC, FL, GA, HI, IL, KS, KY, ME, MD, MA, MI,

MN, MS, MO, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA,

RI, SC, TN, UT, VA, WA, WV, WI,

ATTACHMENT 5

990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
EU SERVICES PO BOX 5935 TROY, MI 48007	PRINT/PUBLICATIONS	167,699.
ALLEGIANCE CREATIVE 11250 WAPLES MILL ROAD FAIRFAX, VA 22030	FUNDRAISING COUNSEL	174,375.
IMMERSION ACTIVE INC 44 NORTH MARKET STREET FREDERICK, MD 21701	ONLINE COURSE	238,688.
HEIDRICK & STRUGGLES INC 1133 PAYSPHERE CIRCLE CHICAGO, IL 60674	RECRUITMENT	139,543.
REDMON GROUP INC 211 NORTH UNION ST ALEXANDRIA, VA 22314	HTML CONVERSION	145,450.

THE AOPA FOUNDATION, INC.

20-8817225

**SCHEDULE R  
(Form 990)**Department of the Treasury  
Internal Revenue Service

Name of the organization

THE AOPA FOUNDATION, INC.

OMB No. 1545-0047

**2014**Open to Public  
Inspection**Related Organizations and Unrelated Partnerships**

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

► Attach to Form 990.

► Information about Schedule R (Form 990) and its Instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).Employer identification number  
20-8817225**Part I Identification of Disregarded Entities** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) AIRCRAFT OWNERS & PILOTS ASSOCIATION 52-0636210 421 AVIATION WAY FREDERICK, MD 21701	MEMBERSHIP	NJ	501C4	N/A	N/A		X
(2) AOPA POLITICAL ACTION COMMITTEE 56-3014117 421 AVIATION WAY FREDERICK, MD 21701	PAC		527	N/A	N/A		X
(3)							
(4)							
(5)							
(6)							
(7)							

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

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

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) AOPA INSURANCE AGENCY 1995 MIDFIELD ROAD WICHITA, KS 67209 521813554	INSURANCE	MD	AOPA	C CORP					X
(2) AOPA FLIGHT TECHNOLOGIES INC 421 AVIATION WAY FREDERICK, MD 21701 454565150	AVIATION PROD	DE	AOPA	C CORP					X
(3) AOPA HOLDINGS CORPORATION 421 AVIATION WAY FREDERICK, MD 21701 461036265	HOLDINGS COMP	DE	AOPA	C CORP					X
(4)									
(5)									
(6)									
(7)									

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

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

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

- a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity . . . . .
- b Gift, grant, or capital contribution to related organization(s) . . . . .
- c Gift, grant, or capital contribution from related organization(s) . . . . .
- d Loans or loan guarantees to or for related organization(s) . . . . .
- e Loans or loan guarantees by related organization(s) . . . . .
- f Dividends from related organization(s) . . . . .
- g Sale of assets to related organization(s) . . . . .
- h Purchase of assets from related organization(s) . . . . .
- i Exchange of assets with related organization(s) . . . . .
- j Lease of facilities, equipment, or other assets to related organization(s) . . . . .
- k Lease of facilities, equipment, or other assets from related organization(s) . . . . .
- l Performance of services or membership or fundraising solicitations for related organization(s) . . . . .
- m Performance of services or membership or fundraising solicitations by related organization(s) . . . . .
- n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .
- o Sharing of paid employees with related organization(s) . . . . .
- p Reimbursement paid to related organization(s) for expenses . . . . .
- q Reimbursement paid by related organization(s) for expenses . . . . .
- r Other transfer of cash or property to related organization(s) . . . . .
- s Other transfer of cash or property from related organization(s) . . . . .

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

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)	AIRCRAFT OWNERS & PILOTS ASSOCIATION	B	1,505,000.	FMV
(2)	AIRCRAFT OWNERS & PILOTS ASSOCIATION	M, N, O, P	4,642,923.	FMV
(3)	AOPA INSURANCE AGENCY	C	390,000.	FMV
(4)	AIRCRAFT OWNERS & PILOTS ASSOCIATION	S	831,223.	FMV
(5)				
(6)				

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

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

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

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**Part VII Supplemental Information**

Complete this part to provide additional information for responses to questions on Schedule R (see instructions).

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