Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) ▶ Do not enter Social Security numbers on this form as it may be made public.

▶ Information about Form 990 and its instructions is at www.irs.gov/form990.

| _ | For the 2 | 013 calendar year, or tax year beginning 01/01 , 2013, and e | naing | 2/31 | , 20 13 | | | | | | | |
|----------------------------|---------------|---|-------------------|----------------------|--------------------------------|--|--|--|--|--|--|--|
| В | Check if a | oplicable: C Name of organization CFIDS ASSOCIATION OF AMERICA INC | | D Employ | er identification number | | | | | | | |
| • | Address cl | nange Doing Business As CFIDS ASSOCIATION INC | | 56-1683450 | | | | | | | | |
| | Name cha | Number and street (or P.O. box if mail is not delivered to street address) Roo | m/suite | E Telephor | ne number | | | | | | | |
| | Initial retur | 6827 Fairview Road Suite C | | | 704-364-0016 | | | | | | | |
| | Terminated | City or town, state or province, country, and ZIP or foreign postal code | | | | | | | | | | |
| $\overline{\Box}$ | Amended | | | | | | | | | | | |
| $\overline{\Box}$ | Application | | aroup return for | subordinates? Yes No | | | | | | | | |
| _ | , ppca | 6827 Fairview Road, Suite C, Charlotte, NC 28210 | I | | s included? Yes No | | | | | | | |
| $\overline{}$ | Tax-exem | | 16 "11 " | | see instructions) | | | | | | | |
| <u>.</u> | Website: | | | p exemption | number > | | | | | | | |
| _ | | anization: Corporation Trust Association ✓ Other ► Non-Profit L Year of fo | | | of legal domicile: NC | | | | | | | |
| _ | art I | Summary | 1707 | otato | or regar derinioner 100 | | | | | | | |
| | _ | riefly describe the organization's mission or most significant activities: The | no Association's | mission is | for ME/CES to be | | | | | | | |
| ø | | videly understood, diagnosable and treatable. | ic Association s | 11113310111 | S TOT INIE/OT 5 TO BC | | | | | | | |
| auc | | videly dilucistood, diagnosable and treatable. | | | | | | | | | | |
| Activities & Governance | 2 0 | : | ad of more the | n 25% of | ite not accets | | | | | | | |
| ove. | | | | 1 1 | 115 1161 055615. | | | | | | | |
| G | 1 | | | | 9 | | | | | | | |
| S | 1 | lumber of independent voting members of the governing body (Part VI, line | , | | 9 | | | | | | | |
| Ìŧ | 1 | otal number of individuals employed in calendar year 2013 (Part V, line 2a) | | . 5 | 8 | | | | | | | |
| ξį | | otal number of volunteers (estimate if necessary) | | . 6 | 20 | | | | | | | |
| ⋖ | | otal unrelated business revenue from Part VIII, column (C), line 12 | | . 7a | 0 | | | | | | | |
| | b N | let unrelated business taxable income from Form 990-T, line 34 | | . 7b | 0 | | | | | | | |
| | | | Prior Y | | Current Year | | | | | | | |
| <u>•</u> | | contributions and grants (Part VIII, line 1h) | | 1,088,346 | 2,261,366 | | | | | | | |
| en | 1 | rogram service revenue (Part VIII, line 2g) | | 12,357 | 18,091 | | | | | | | |
| Revenue | 1 | evestment income (Part VIII, column (A), lines 3, 4, and 7d) | | 2,615 | 2,432 | | | | | | | |
| - | | other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | | 851 | 0 | | | | | | | |
| | 12 T | otal revenue-add lines 8 through 11 (must equal Part VIII, column (A), line 12 | 2) | 1,104,169 | 2,281,889 | | | | | | | |
| | 13 (| rants and similar amounts paid (Part IX, column (A), lines 1-3) | | 235,121 | 208,700 | | | | | | | |
| | 14 E | enefits paid to or for members (Part IX, column (A), line 4) | | 0 | 0 | | | | | | | |
| S | 15 S | alaries, other compensation, employee benefits (Part IX, column (A), lines 5-10 |) | 578,245 | 598,922 | | | | | | | |
| nse | 16 a F | rofessional fundraising fees (Part IX, column (A), line 11e) | | 0 | 0 | | | | | | | |
| Expenses | b T | otal fundraising expenses (Part IX, column (D), line 25) > 236,808 | 3 | | | | | | | | | |
| ũ | 17 | other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | | 434,770 | 663,230 | | | | | | | |
| | 1 | otal expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) | | 1,248,136 | 1,470,852 | | | | | | | |
| | | levenue less expenses. Subtract line 18 from line 12 | | -143,967 | 811,037 | | | | | | | |
| or Ses | + | · · · · · · · · · · · · · · · · · · · | Beginning of C | | End of Year | | | | | | | |
| ets c | 20 T | otal assets (Part X, line 16) | | 1,036,291 | 1,803,772 | | | | | | | |
| Ass Ba | 21 T | otal liabilities (Part X, line 26) | | 100,368 | 58,780 | | | | | | | |
| Net Assets of Fund Balance | 22 N | let assets or fund balances. Subtract line 21 from line 20 | | 935,923 | 1,744,992 | | | | | | | |
| | art II | Signature Block | - | 700/720 | 1// 11///2 | | | | | | | |
| | | es of perjury, I declare that I have examined this return, including accompanying schedules and | statements and to | the hest of n | ny knowledge and belief it is | | | | | | | |
| | | and complete. Declaration of preparer (other than officer) is based on all information of which pre | | | ny knowicage and belief, it is | | | | | | | |
| | | | | | | | | | | | | |
| Sig | n | Signature of officer | | ate | | | | | | | | |
| He | | | | ato | | | | | | | | |
| 110 | ,,, | Kristina Hopkins, Chief Financial Officer Type or print name and title | | | | | | | | | | |
| | | Print/Type preparer's name Preparer's signature | Date | | PTIN | | | | | | | |
| Pa | nid | Time type preparer 5 maine Freparer 5 Signature | Date | Check [| If | | | | | | | |
| Pr | eparer | | 1 | self-emp | pioyed | | | | | | | |
| Us | se Only | Firm's name | Fir | m's EIN ▶ | | | | | | | | |
| <u> </u> | 150 | Firm's address > | Ph | one no. | | | | | | | | |
| Ma | y the IRS | discuss this return with the preparer shown above? (see instructions) . | | | Yes No | | | | | | | |

Form 990 (2013) Page **2**

| Part | <u> </u> |
|------|--|
| | Check if Schedule O contains a response or note to any line in this Part III |
| 1 | Briefly describe the organization's mission: |
| | The mission of the CFIDS Association of America is for ME/CFS to be widely understood, diagnosable and treatable by: Identifying |
| | safe and effective treatments for ME/CFS; Strengthening the ME/CFS community by empowering patients and engaging greater |
| | numbers in our cause; and Aggressively expanding funding for research that will lead to approved treatments and cures for |
| | ME/CFS. |
| 2 | Did the organization undertake any significant program services during the year which were not listed on the |
| | prior Form 990 or 990-EZ? |
| | 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? |
| | 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. |
| | the total expenses, and reventes, if any, for each program our vice reperted. |
| 40 | (Code:) (Expenses \$ 916,340 including grants of \$ 208,700) (Revenue \$ 18,091) |
| 4a | |
| | Research - The CFIDS Association has worked over the past 5 years to invest our constituents' donations in our Research Institute |
| | Without Walls (RIWW). Our innovative RIWW continues to provide early funding to the most promising researchers, using our |
| | SolveCFS BioBank to put patients at the center of that research; pairing patient samples and clinical information with the brightest |
| | investigators from the best medical institutions in the world. The Research Institute Without Walls focuses on: Identifying disease |
| | subtypes and biomarkers (45%), Developing disease-modifying treatments (25%), Defining ME/CFS (20%) and Software tools |
| | (10%). Identifying disease subtypes and biomarkers - ME/CFS is a multifaceted and complex disease. To discover the cause and |
| | effective treatments we must break down the complexity and identify groups of patients that are similar to one another. How is that |
| | done? With blood and clinical information. Blood is a 'molecular biopsy' that can provide clues to biology from all parts of the body. |
| | The SolveCFS BioBank harnesses the power of patient information and patient samples. The BioBank has attracted some of the |
| | brightest investigators from the best medical institutions including Harvard, Columbia, Johns Hopkins, University of Alberta, NYU |
| | Langone Medical Center and University of Toronto. Developing Disease-modifying treatment - While funding cutting edge research |
| | (Continued on Schedule O, Statement 1) |
| 4b | (Code:) (Expenses \$ 248,936 including grants of \$ 0) (Revenue \$ 0) |
| | Communications and Engagement - The Association knows that we can't achieve our goals without an informed and connected |
| | patient population. Patients are a key ingredient to making ME/CFS understood, diagnosable and treatable. To that end, we are |
| | working to empower patients with more information through our Catalyst Cafés, e-newsletters, the SolveCFS Chronicle publication |
| | and online. More than a quarter of a million people visited the CFIDS Association website last year, most searching for answers, |
| | looking for hope. The Association holds the most extensive library of patient information and resources, reports on the latest |
| | updates and research opportunities and helps patients feel less alone. In an effort to make this information easier to find, readily |
| | share-able and more deeply engaging we launched a new web presence which replaces the SolveCFS BioBank micro-site, CFIDS. |
| | org and the Research1st blog with one synthesized online presence. The synergy achieved through www.SolveCFS.org will reach |
| | more patients, engage more in the research process, and better involve all ME/CFS stakeholders in the important work of the |
| | |
| | Association. Early numbers tell us that people are staying on the site more than twice as long as they did on the old website - a |
| | key indicator that visitors are finding what they need in a more welcoming format. We continue to hold Catalyst Café events across |
| 4- | (Continued on Schedule O, Statement 2) |
| 4c | (Code:) (Expenses \$including grants of \$) (Revenue \$) |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| 4d | Other program services (Describe in Schedule O.) |
| - | (Expenses \$ 0 including grants of \$ 0) (Revenue \$ 0) |
| 4e | Total program service expenses ► 1,165,276 |
| | the state of the s |

| Part | V 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 | , | |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? | 2 | ~ | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If</i> "Yes," complete Schedule C, Part I | 3 | | , |
| 4 | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> | 4 | | , |
| 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 | | , |
| 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 | | , |
| 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 | | , |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III | 8 | | , |
| 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? <i>If</i> "Yes," <i>complete Schedule D, Part IV</i> | 9 | | , |
| 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 | ~ | |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VIII, IX, or X as applicable. | | | |
| а | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI | 11a | , | |
| 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 | | ~ |
| | 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? <i>If "Yes," complete Schedule D, Part VIII </i> | 11c | | ~ |
| 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? <i>If "Yes," complete Schedule D, Part IX</i> | 11d | | ~ |
| | Did the organization report an amount for other liabilities in Part X, line 25? <i>If</i> "Yes," <i>complete Schedule D, Part X</i> 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)? <i>If</i> "Yes," <i>complete Schedule D, Part X</i> . | 11e | V | |
| 12 a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII | 12a | ~ | |
| 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 | | ~ |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 13 | | ~ |
| 14 a | · · · · · · · · · · · · · · · · · · · | 14a | | ~ |
| D | 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 | ~ | |
| 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? <i>If "Yes," complete Schedule F, Parts II and IV</i> | 15 | / | |
| 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 | | , |
| 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? <i>If "Yes," complete Schedule G, Part I (see instructions)</i> | 17 | | ~ |
| 18 | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> | 18 | | ~ |
| 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 | | ~ |
| 20 a | Did the organization operate one or more hospital facilities? If "Yes." complete Schedule H | 20a | | ~ |

b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?

20b

| Part | 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 government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II | 21 | , | |
| 22 | Did the organization report more than \$5,000 of grants or other assistance to individuals in the United States on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III | 22 | | , |
| 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 | | , |
| 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 | | , |
| | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? | 24b 24c | | |
| d 25a | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If</i> "Yes," complete Schedule L, Part I | 24d 25a | | ~ |
| 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 | | , |
| 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 so, complete Schedule L, Part II | 26 | | , |
| 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 | | , |
| 28 | Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): | | | |
| a b | A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV </i> | 28a 28b | | <i>'</i> |
| С | 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? <i>If "Yes," complete Schedule L, Part IV</i> | 28c | | ~ |
| 29 30 | Did the organization receive more than \$25,000 in non-cash contributions? <i>If</i> "Yes," <i>complete Schedule M</i> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If</i> "Yes," <i>complete Schedule M</i> | 30 | V | , |
| 31 | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I | 31 | | , |
| 32 | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II | 32 | | , |
| 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? <i>If</i> "Yes," <i>complete Schedule R, Part I</i> | 33 | | , |
| 34 | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 | 34 | ~ | |
| 35a b | Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 35a 35b | | ' |
| 36 | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 | 36 | | ~ |
| 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? <i>If "Yes," complete Schedule R, Part VI </i> | | | , |
| 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 | 37 | ~ | |

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 | | | . [|
|---------|---|-----|-----|-----|
| | | | Yes | No |
| 1a | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable | - | | |
| b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable | 4 | | |
| С | Did the organization comply with backup withholding rules for reportable payments to vendors and | | | |
| _ | reportable gaming (gambling) winnings to prize winners? | 1c | ~ | |
| 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 8 | | | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? . | 2b | ~ | |
| _ | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) | | | |
| 3a | Did the organization have unrelated business gross income of \$1,000 or more during the year? | 3a | | ~ |
| b | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O | 3b | | |
| 4a | At any time during the calendar year, did the organization have an interest in, or a signature or other authority | | | |
| | over, a financial account in a foreign country (such as a bank account, securities account, or other financial | ١. | | _ |
| | account)? | 4a | | |
| b | If "Yes," enter the name of the foreign country: ► | | | |
| _ | See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts. | _ | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | 5a | | ~ |
| b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | 5b | | ~ |
| C | If "Yes" to line 5a or 5b, did the organization file Form 8886-T? | 5c | | |
| 6a | organization solicit any contributions that were not tax deductible as charitable contributions? | 6a | | _ |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or | Ua | | ļ • |
| | gifts were not tax deductible? | 6b | | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | OD | | |
| 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? | 7a | | ~ |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | 7b | | |
| С | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was | | | |
| | required to file Form 8282? | 7c | | ~ |
| d | If "Yes," indicate the number of Forms 8282 filed during the year | | | |
| е | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | 7e | | ~ |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . | 7f | | ~ |
| g | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? | 7g | | |
| h | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | 7h | | |
| 8 | Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting | | | |
| | organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring | | | |
| | organization, have excess business holdings at any time during the year? | 8 | | |
| 9 | Sponsoring organizations maintaining donor advised funds. | | | |
| а | Did the organization make any taxable distributions under section 4966? | 9a | | |
| b | Did the organization make a distribution to a donor, donor advisor, or related person? | 9b | | |
| 10 | Section 501(c)(7) organizations. Enter: | | | |
| a | Initiation fees and capital contributions included on Part VIII, line 12 | - | | |
| b 11 | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . 10b Section 501(c)(12) organizations. Enter: | - | | |
| 11 a | Gross income from members or shareholders | | | |
| b | Gross income from other sources (Do not net amounts due or paid to other sources | - | | |
| | against amounts due or received from them.) | | | |
| 12a | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? | 12a | | |
| u | 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. | | | |
| а | Is the organization licensed to issue qualified health plans in more than one state? | 13a | | |
| | Note. See the instructions for additional information the organization must report on Schedule O. | | | |
| b | Enter the amount of reserves the organization is required to maintain by the states in which | | | |
| | the organization is licensed to issue qualified health plans | | | |
| С | Enter the amount of reserves on hand | | | |
| 14a | Did the organization receive any payments for indoor tanning services during the tax year? | 14a | | ~ |
| b | If "Yes." has it filed a Form 720 to report these payments? If "No." provide an explanation in Schedule O. | 14b | | 1 |

Form 990 (2013) Page **6**

Part VI

Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a

response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions. Section A. Governing Body and Management Nο 1a Enter the number of voting members of the governing body at the end of the tax year . . . 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. Enter the number of voting members included in line 1a, above, who are independent . 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with 2 ~ 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 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? 4 4 Did the organization become aware during the year of a significant diversion of the organization's assets? . 5 5 6 6 Did the organization have members, stockholders, or other persons who had the power to elect or appoint 7a Are any governance decisions of the organization reserved to (or subject to approval by) members, 7b Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 8a ~ 8b 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 Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) Nο 10a Did the organization have local chapters, branches, or affiliates? 10a If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? 10b 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? 11a b Describe in Schedule O the process, if any, used by the organization to review this Form 990. **12a** Did the organization have a written conflict of interest policy? If "No," go to line 13 12a Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? 12b 1 Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," 1 12c 13 13 ~ 14 1 14 Did the organization have a written document retention and destruction policy? 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? The organization's CEO, Executive Director, or top management official 1 15a 15b 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 16a / 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 Section C. Disclosure List the states with which a copy of this Form 990 is required to be filed ▶ 17 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) 18 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) Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and 19 financial statements available to the public during the tax year. State the name, physical address, and telephone number of the person who possesses the books and records of the 20 organization: ► Kristina P Hopkins, (704)364-0016

| orm 990 (2013) | Page 7 |
|----------------|---------------|
|----------------|---------------|

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 n | or any relate | d org | aniz | | | ompe | ensa | ated any currer | t officer, director | r, or trustee. |
|--|--|------------------------|--|---------|--------------|------------------------------|--------|--|----------------------------------|--|
| | | | | | C) | | | | | |
| (A) | (B) | (do n | ot of | | ition | | ono | (D) | (E) | (F) |
| Name and Title | Average | ١, | (do not check more to box, unless person is | | | | | Reportable | Reportable | Estimated |
| | hours per week (list any | | er an | d a c | lirect | or/trus | | compensation from | compensation from related | amount of other |
| | hours for related organizations below dotted line) | ndividua or directo | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | the organization (W-2/1099-MISC) | organizations (W-2/1099-MISC) | compensation from the organization and related organizations |
| Maryam Aghamirzadeh | 20 | | | | | | | | | |
| Interim CEO | 0 | | | | | ~ | | 19,444 | 0 | 778 |
| Diane R Bean | 1 | | | | | | | | | |
| Director | 0 | ~ | | | | | | 0 | 0 | 0 |
| Victoria Boies PsyD | 8 | | | | | | | | | |
| Vice Chair | 0 | ~ | | ~ | | | | 0 | 0 | 0 |
| Kevin Frick | 5.00 | | | | | | | | | |
| Treasurer | 0 | ~ | | ~ | | | | 0 | 0 | 0 |
| K Kimberly McCleary | 40 | | | | | | | | | |
| President & CEO | 0 | ~ | | | | ~ | | 85,749 | 0 | 4,477 |
| Amy Squires | 8 | | | | | | | | | |
| Chair | 0 | ~ | | ~ | | | | 0 | 0 | 0 |
| Lynn Fuentes PhD | 1 | | | | | | | | | |
| Secretary | 0 | ~ | | ~ | | | | 0 | 0 | 0 |
| Beth Garfield | 1 | | | | | | | | | |
| Director | 0 | ~ | | | | | | 0 | 0 | 0 |
| Michael Greenwell | 1 | | | | | | | | | |
| Director | 0 | ~ | | | | | | 0 | 0 | 0 |
| Carol Head | 40 | | | | | | | | | |
| President & CEO | 0 | ~ | | | | ~ | | 23,377 | 0 | 1,847 |
| Pam Laird | 1 | | | | | | | | | |
| Director | 0 | ~ | | | | | | 0 | 0 | 0 |
| Terry Tyler MD | 1 | | | | | | | | | |
| Director | 0 | ~ | | | | | | 0 | 0 | 0 |
| Christine Williams | 1 | | | | | | | | | |
| Director | 0 | ~ | | | | | | 0 | 0 | 0 |
| Suzanne P Vernon | 40 | | | | | | | | | |
| Scientific Director | 0 | | | | | ~ | | 133,274 | 0 | 4,963 |

| Part | VII Section A. Officers, Directors, Trust | tees, Key E | mplo | yees | s, aı | nd F | lighe | st C | ompensated E | mployees (d | ontin | ued) | |
|---------|--|--|--------------------------------|-----------------------|---------------------|--------------|--------------------------------|-------------|--|---------------------------------------|------------|---|--------|
| | (A) Name and title | (B) Average hours per | box, | unles | Pos neck s pe | rson | e than o is both or/trus | n an | (D) Reportable compensation | (E) Reportabl compensation | | (F) Estimated amount of | |
| | | week (list any hours for related organizations below dotted line) | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | from the organization (W-2/1099-MISC) | related organizatio (W-2/1099-M | | other compensatio from the organizatior and related organization | n I |
| Kristi | na P Hopkins | 40 | | | | | | | | | | | |
| Chief | Financial Officer | 0 | | | | | ~ | | 84,695 | | 0 | | 8,346 |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| 1b c | Sub-total | VII, Sectio | n A | • | | | | > | 346,539 | | 0 | 2 | 0,411 |
| d | Total (add lines 1b and 1c) | | | | | | | | 346,539 | | 0 | 2 | 0,411 |
| 2 | Total number of individuals (including bureportable compensation from the organi | | | ose | list | ed | above | e) w | rho received m | ore than \$10 | 00,00 | O of | |
| | reportable compensation from the organi | ization v | | | | | | | | | | Yes | No |
| 3 | Did the organization list any former of employee on line 1a? <i>If</i> "Yes," complete of | | | | | | | - | oloyee, or high | | | | |
| 4 | For any individual listed on line 1a, is the | | | | | | | | | | | e 3 | · |
| _ | organization and related organizations | | | | | | | | | | | | |
| _ | individual | | | | | | | • | | | | 4 | ~ |
| 5 | Did any person listed on line 1a receive of for services rendered to the organization | | | | | | | | | ation or ind | iviaua | 5 | ~ |
| Section | on B. Independent Contractors | | | | | | | | i | | | | |
| 1 | Complete this table for your five highest compensation from the organization. Repyear. | | | | | | | | | | | | ax |
| | (A) Name and business add | Iress | | | | | | | (B) Description of s | ervices | | (C) Compensation | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | , | | | | | | Ĺ,. | ,, , , , | , , | | | |
| 2 | Total number of independent contractor received more than \$100,000 of compens | | | | | | | o th | ose listed abo | ove) who | | | |

| Form 990 (2 | 2013) |
|-------------|--|
| Part VI | Statement of Revenue |
| <u>-</u> | Charle if Cahadula O contains a vegenous av note to any line in this Dort VIII |

| | | Check if Schedule O contains a resp | oonse 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 |
| ts | 1a | Federated campaigns 1a | 19,670 | | | | |
| Contributions, Gifts, Grants and Other Similar Amounts | b | Membership dues 1b | 0 | | | | |
| | С | Fundraising events 1c | 0 | | | | |
| ar/ | d | Related organizations 1d | 0 | | | | |
| s, G | е | Government grants (contributions) 1e | 0 | | | | |
| io S | f | All other contributions, gifts, grants, | | | | | |
| but | | and similar amounts not included above 1f | 2,241,696 | | | | |
| ğ | g | Noncash contributions included in lines 1a-1f: \$ | 601,736 | | | | |
| a Co | h | Total. Add lines 1a-1f | | 2,261,366 | | | |
| | | | Business Code | | | | |
| Ju j | 2a | Research subcontracts | 541700 | 18,091 | 18,091 | 0 | 0 |
| Ве | b | | 011700 | 10,071 | .0/071 | | |
| Program Service Revenue | C | | | | | | |
| ē | d | | | | | | |
| E | e | | | | | | |
| gra | f | All other program service revenue. | | 0 | 0 | 0 | 0 |
| Pro | g | Total. Add lines 2a–2f | • | 18,091 | - | | |
| | 3 | Investment income (including divide | | 10,071 | | | |
| | | and other similar amounts) | | 2,432 | 2,432 | 0 | 0 |
| | 4 | Income from investment of tax-exempt bo | ⊢ | 0 | 0 | 0 | 0 |
| | 5 | Royalties | · · · | 0 | 0 | 0 | 0 |
| | | (i) Real | (ii) Personal | - | - | - | |
| | 6a | Gross rents | | | | | |
| | b | Less: rental expenses | | | | | |
| | С | Rental income or (loss) | 0 | | | | |
| | d | Net rental income or (loss) | ▶ | | | | |
| | 7a | Gross amount from sales of (i) Securities | (ii) Other | | | | |
| | | assets other than inventory | | | | | |
| | b | Less: cost or other basis and sales expenses . | | | | | |
| | С | Gain or (loss) 0 | 0 | | | | |
| | d | Net gain or (loss) | | | | | |
| ne | | Gross income from fundraising | | | | | |
| /en | | events (not including \$ 0 | | | | | |
| Other Reven | | of contributions reported on line 1c). See Part IV, line 18 a | | | | | |
| Ě | b | Less: direct expenses b | | | | | |
| O | С | Net income or (loss) from fundraising | events . ► | | | | |
| | | Gross income from gaming activities. | | | | | |
| | | See Part IV, line 19 a | | | | | |
| | b | Less: direct expenses b | | | | | |
| | С | Net income or (loss) from gaming acti | vities ▶ | | | | |
| | 10a | Gross sales of inventory, less | | | | | |
| | | returns and allowances a | | | | | |
| | b | Less: cost of goods sold b | | | | | |
| | С | Net income or (loss) from sales of inve | | | | | |
| | | Miscellaneous Revenue | Business Code | | | | |
| | 11a | | | | | | |
| | b | | | | | | |
| | С | | | | | | |
| | d | All other revenue | | | | | |
| | е | Total. Add lines 11a-11d | ▶ | 0 | | | |
| | 12 | Total revenue. See instructions | ▶ [| 2,281,889 | 20,523 | 0 | 0 |

Part IX Statement of Functional Expenses

following SOP 98-2 (ASC 958-720)

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A). Check if Schedule O contains a response or note to any line in this Part IX ~ Do not include amounts reported on lines 6b, 7b, (A) Total expenses (B) Program service **(D)** Fundraising Management and general expenses 8b, 9b, and 10b of Part VIII. expenses expenses Grants and other assistance to governments and organizations in the United States. See Part IV. line 21 163,825 163,825 2 Grants and other assistance to individuals in the United States. See Part IV, line 22 . . . 0 0 3 Grants and other assistance to governments, organizations, and individuals outside the United States, See Part IV, lines 15 and 16. 44,875 44,875 Benefits paid to or for members 0 0 5 Compensation of current officers, directors, trustees, and key employees 0 0 0 0 Compensation not included above, to disqualified 6 persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . 0 0 0 7 Other salaries and wages 535,509 414,957 36,100 84,452 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) 16,478 11,259 1,563 3,656 Other employee benefits 9 0 0 0 0 10 Payroll taxes 46,935 32,069 4,452 10,414 11 Fees for services (non-employees): Management 0 0 0 0 Legal 105,961 77.779 8,439 19,743 19,850 13,563 1.883 4,404 Lobbying 0 0 0 0 Professional fundraising services. See Part IV, line 17 Investment management fees f 0 0 0 0 Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . 196,134 153,999 3,652 38,483 12 Advertising and promotion 0 0 0 0 13 Office expenses 30,380 16,746 1,056 12,578 14 Information technology 15,729 10.747 1,492 3,490 15 Royalties 0 0 0 Occupancy 4,709 16 49,648 33,923 11,016 17 54,723 29,483 1,606 23,634 18 Payments of travel or entertainment expenses for any federal, state, or local public officials 0 0 0 0 19 Conferences, conventions, and meetings . 0 69,560 66,638 2,922 20 58 40 5 13 21 Payments to affiliates 0 0 0 0 22 Depreciation, depletion, and amortization . 8.847 6.045 839 1.963 23 8,115 770 5,544 1,801 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.) SolveCFS BioBank Costs 52,999 52,999 0 а 0 Printing and Postage 10,482 175 12,846 23,503 C Miscellaneous 27,723 20,303 2,027 5,393 d All other expenses е **Total functional expenses.** Add lines 1 through 24e 25 1,470,852 1.165.276 68.768 236,808 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here if

Part X Balance Sheet

| | | Check if Schedule O contains a response or | r note | to any line in this Pa | art X | | 🗆 |
|-----------------------------|-----|--|--------------------|---|--------------------------|-----|--------------------|
| | | · | | , | (A) Beginning of year | | (B) End of year |
| | 1 | Cash-non-interest-bearing | | | 0 | 1 | 0 |
| | 2 | Savings and temporary cash investments | | | 972,541 | 2 | 1,444,203 |
| | 3 | Pledges and grants receivable, net | | | 11,473 | 3 | 314,837 |
| | 4 | Accounts receivable, net | 937 | 4 | 1,198 | | |
| | 5 | Loans and other receivables from current and | | | | | |
| | | trustees, key employees, and highest co | | | | | |
| | | • | | | 0 | 5 | 0 |
| S | 6 | Loans and other receivables from other disqualified pers 4958(f)(1)), persons described in section 4958(c)(3)(B), ar sponsoring organizations of section 501(c)(9) volunorganizations (see instructions). Complete Part II of Sche | nd cont ntary e | ributing employers and employees' beneficiary | 0 | 6 | 0 |
| Assets | 7 | Notes and loans receivable, net | | | 0 | 7 | 0 |
| As | 8 | Inventories for sale or use | | | 515 | 8 | 359 |
| | 9 | Prepaid expenses and deferred charges | | | 8,012 | | 5,543 |
| | 10a | Land, buildings, and equipment: cost or | | | 5/1.2 | | 375.13 |
| | | other basis. Complete Part VI of Schedule D | 10a | 72,437 | | | |
| | b | Less: accumulated depreciation | 10b | 61,682 | 16,967 | 10c | 10,755 |
| | 11 | Investments—publicly traded securities | | | | 11 | |
| | 12 | Investments-other securities. See Part IV, line | 11 . | | | 12 | |
| | 13 | Investments-program-related. See Part IV, line | 11 . | | | 13 | |
| | 14 | Intangible assets | | | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | | 25,846 | 15 | 26,877 |
| | 16 | Total assets. Add lines 1 through 15 (must equa | al line | 34) | 1,036,291 | 16 | 1,803,772 |
| | 17 | Accounts payable and accrued expenses | | | 83,112 | 17 | 46,143 |
| | 18 | Grants payable | | | 0 | 18 | 0 |
| | 19 | Deferred revenue | | | 0 | 19 | 0 |
| | 20 | Tax-exempt bond liabilities | | | 0 | 20 | 0 |
| | 21 | Escrow or custodial account liability. Complete | | | 0 | 21 | 0 |
| Liabilities | 22 | Loans and other payables to current and for | | | | | |
| ij | | trustees, key employees, highest compen | | | | | |
| iak | 00 | disqualified persons. Complete Part II of Schedu | | | 0 | | 0 |
| _ | 23 | Secured mortgages and notes payable to unrela | | • | 0 | 23 | 0 |
| | 24 | Unsecured notes and loans payable to unrelated Other liabilities (including federal income tax, | | • | 0 | 24 | 0 |
| | 25 | parties, and other liabilities not included on lines | | | 17,256 | | 12,637 |
| | | of Schedule D | | | 17,230 | 25 | 12,037 |
| | 26 | Total liabilities. Add lines 17 through 25 | | | 100,368 | | 58,780 |
| | | Organizations that follow SFAS 117 (ASC 958 | | | | | 33,700 |
| sec | | complete lines 27 through 29, and lines 33 and | d 34. | _ | | | |
| anc | 27 | Unrestricted net assets | | | 806,536 | 27 | 1,418,067 |
| Bal | 28 | Temporarily restricted net assets | | | 123,987 | 28 | 321,525 |
| Ιþι | 29 | Permanently restricted net assets | | | 5,400 | 29 | 5,400 |
| Fur | | Organizations that do not follow SFAS 117 (ASC 95 | 58), ch | eck here ► 🗌 and | | | |
| Net Assets or Fund Balances | | complete lines 30 through 34. | | | | | |
| ts | 30 | Capital stock or trust principal, or current funds | | | | 30 | |
| SSE | 31 | Paid-in or capital surplus, or land, building, or ed | | | | 31 | |
| ţΑ | 32 | Retained earnings, endowment, accumulated in | | | | 32 | |
| Ne | 33 | Total net assets or fund balances | | | 935,923 | | 1,744,992 |
| | 34 | Total liabilities and net assets/fund balances . | | <u> </u> | 1,036,291 | 34 | 1,803,772 |

Form 990 (2013) Page **12**

| 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 | | | 1,889 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | | 1,47 | 0,852 |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | | 81 | 1,037 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | | 93 | 5,923 |
| 5 | Net unrealized gains (losses) on investments | 5 | | | 0 |
| 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 | | - | 1,968 |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line | | | | |
| | 33, column (B)) | 10 | | 1,74 | 4,992 |
| Part | XII Financial Statements and Reporting | | | | |
| | Check if Schedule O contains a response or note to any line in this Part XII | | | | \Box |
| | | | | Yes | No |
| 1 | Accounting method used to prepare the Form 990: Cash Accrual Other | | _ | | |
| | If the organization changed its method of accounting from a prior year or checked "Other," ex | olain i | n | | |
| | Schedule O. | | | | |
| 2a | | | | | ~ |
| | If "Yes," check a box below to indicate whether the financial statements for the year were comp | oiled c | or | | |
| | reviewed on a separate basis, consolidated basis, or both: | | | | |
| _ | Separate basis Consolidated basis Both consolidated and separate basis | | | | |
| b | Were the organization's financial statements audited by an independent accountant? | | . 2b | ~ | |
| | If "Yes," check a box below to indicate whether the financial statements for the year were audite | d on | a | | |
| | separate basis, consolidated basis, or both: | | | | |
| | ✓ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis | ! ! | | | |
| С | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for or of the audit, review, or compilation of its financial statements and selection of an independent account | _ | . | | |
| | | | | ~ | |
| | If the organization changed either its oversight process or selection process during the tax year, ex Schedule O. | piain i | n | | |
| 0- | As a result of a federal award, was the organization required to undergo an audit or audits as set | forth: | _ | | |
| 3a | the Single Audit Act and OMB Circular A-133? | | | | |
| b | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo | | | | <u> </u> |
| D | required audit or audits, explain why in Schedule O and describe any steps taken to undergo such a | | e 3b | | |
| | Toquilou addit of addito, explain why in concadio o and describe any steps taken to undergo such a | auro. | | QQA | (2013) |
| | | | го | 111 J J J | , (∠UIJ) |

SCHEDULE A (Form 990 or 990-EZ)

Public Charity Status and Public Support

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

2013

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

► Attach to Form 990 or Form 990-EZ.

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

Open to Public Inspection

| Name of the organization | | | | | | | ⊏mpioyer i | aenuncauo | n number | | |
|--|---------------------------------|--|-----------------------|---|-------------------------|--|-------------------------|---|-------------|------------|---------|
| CFIDS ASSOCIATION OF AI | MERICA INC | | | | | | | 56-16 | 83450 | | |
| Part I Reason for | Public Chai | rity Status (All orga | nizations | s must c | omplete | this pa | rt.) See | instructio | ons. | | |
| The organization is not a p | rivate founda | tion because it is: (Fo | or lines 1 t | through 1 | 1, check | only one | box.) | | | | |
| 1 A church, conven | tion of churcl | hes, or association of | churches | s describe | ed in sec | tion 170 | (b)(1)(A)(| i). | | | |
| 2 A school describe | ed in section | 170(b)(1)(A)(ii). (Attac | ch Schedi | ule E.) | | | | | | | |
| 3 A hospital or a co | operative hos | spital service organiza | ation desc | cribed in s | section [•] | 170(b)(1) | (A)(iii). | | | | |
| 4 A medical researd hospital's name, of | _ | on operated in conjunce: | | • | | | | | (iii). Ente | r the | |
| 5 An organization of section 170(b)(1) | | the benefit of a colle | ge or uni | versity ov | wned or | operated | I by a go | vernmen | tal unit o | lescrit | oed in |
| 7 An organization to | hat normally | nment or government receives a substantia (A)(vi). (Complete Par | al part of | | | | | nit or fror | n the ge | neral | public |
| 8 A community trus | t described in | n section 170(b)(1)(A |)(vi). (Con | nplete Pa | ırt II.) | | | | | | |
| receipts from act support from gro | ivities related oss investme | receives: (1) more that to its exempt funct nt income and unrefter June 30, 1975. Se | ions—sul lated bus | bject to d siness tax | certain ex xable ind | xceptions come (les | s, and (2 ss section |) no more | e than 3 | 3¹/₃% | of its |
| 10 An organization o | rganized and | operated exclusively | to test fo | or public s | safety. Se | ee sectio | n 509(a) | (4). | | | |
| 11 An organization of purposes of one | organized an or more pub | nd operated exclusive licly supported organ describes the type of | ely for th | ie benefit described | t of, to p | perform ion 509(a | the func a)(1) or s | tions of, ection 50 | 9(a)(2). S | | |
| a 🗌 Type I | b □ Type | II c ☐ Type II | I–Functio | nally integ | grated | d 🗌 . | Type III-I | Non-funct | tionally ir | ntegra | ted |
| e ☐ By checking this other than foundation or section 509(a)(a | ation manage | that the organization ers and other than one | | | | | | | | | |
| _ | | a written determination | on from t | the IRS t | hat it is | а Туре | I, Type | II, or Typ | oe III su | pporti | ng |
| organization, ched | | | | | | | | | | | . 🗆 |
| g Since August 17, following persons | | ne organization accep | pted any | gift or co | ontributio | n from a | any of the | Э | | | |
| | | ndirectly controls, eithody of the supported | | | | | | | | Yes | No |
| (ii) A family mem! | ber of a perso | on described in (i) abo | ove? | | | | | | | | |
| | | a person described in | | | | | | | 11g(ii | | |
| | | on about the support | | | | | | | | - | |
| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1–9 above or IRC section (see instructions)) | in col. (i) lis | organization sted in your document? | the orgai col. (i) | ou notify nization in of your port? | organiza (i) organ | Is the tion in col. ized in the .S.? | (vii) Amou | int of mou | onetary |
| | | , " | Yes | No | Yes | No | Yes | No | | | |
| (A) | | | | | | | | | | | |
| (B) | | | | | | | | | | | |
| (C) | | | | | | | | | | | |
| (D) | | | | | | | | | | | |
| (E) | | | | | | | | | | | |
| | | | | | | | | | | | |

18

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) 2009 **(b)** 2010 (c) 2011 (d) 2012 **(e)** 2013 (f) Total grants, contributions, 1 membership fees received. (Do not include any "unusual grants.") . . . 1,150,411 1,244,573 1,196,911 1,088,346 2,261,366 6,941,607 2 revenues levied organization's benefit and either paid to or expended on its behalf . . . The value of services or facilities furnished by a governmental unit to the organization without charge Total. Add lines 1 through 3. . . . 1,244,573 4 1,150,411 1,196,911 1,088,346 6,941,607 2,261,366 5 The portion of total contributions by each person (other than governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) **Public support.** Subtract line 5 from line 4. 6,941,607 Section B. Total Support Calendar year (or fiscal year beginning in) ▶ (a) 2009 **(b)** 2010 (c) 2011 (d) 2012 (e) 2013 (f) Total 7 Amounts from line 4 1,150,411 1,244,573 1,196,911 1,088,346 2,261,366 6,941,607 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources 5,934 3,053 1,275 2,615 15,309 Net income from unrelated business 9 activities, whether or not the business is regularly carried on 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) 9,950 5,246 2,404 851 1.449 **Total support.** Add lines 7 through 10 11 6,966,866 Gross receipts from related activities, etc. (see instructions) 12 18.091 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) 13 Section C. Computation of Public Support Percentage 14 Public support percentage for 2013 (line 6, column (f) divided by line 11, column (f)) 99.64 % Public support percentage from 2012 Schedule A, Part II, line 14 15 331/3% support test - 2013. If the organization did not check the box on line 13, and line 14 is 331/3% or more, check this ~ 331/3% support test-2012. If the organization did not check a box on line 13 or 16a, and line 15 is 331/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization 17a 10%-facts-and-circumstances test - 2013. 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 IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported 10%-facts-and-circumstances test - 2012. 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 IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly

Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see

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.)

| <u> </u> | if the organization rails to quality | under the te | ists listed beit | Jw, piease co | Jilipiele Fait | 11.) | |
|----------|---|---------------|------------------|---------------------|----------------|-----------------|-------------|
| | on A. Public Support | | T | | | | |
| | dar year (or fiscal year beginning in) ▶ | (a) 2009 | (b) 2010 | (c) 2011 | (d) 2012 | (e) 2013 | (f) Total |
| 1 | Gifts, grants, contributions, and membership fees | | | | | | |
| 2 | received. (Do not include any "unusual grants.") Gross receipts from admissions, merchandise | | | | | | |
| 2 | 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 | | | | | | |
| | Add lines 7a and 7b | | | | | | |
| 8 | Public support (Subtract line 7c from | | | | | | |
| | line 6.) | | | | | | |
| | on B. Total Support | | | T | 1 | Γ | |
| | dar year (or fiscal year beginning in) ▶ | (a) 2009 | (b) 2010 | (c) 2011 | (d) 2012 | (e) 2013 | (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 | | | | | | |
| _ | • | | | | | | |
| | 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 | | | | | | |
| | 9 , | | | | | | |
| 12 | Other income. Do not include gain or | | | | | | |
| | loss from the sale of capital assets (Explain in Part IV.) | | | | | | |
| 13 | Total support. (Add lines 9, 10c, 11, | | - | | | | |
| 10 | and 12.) | | | | | | |
| 14 | First five years. If the Form 990 is for the | e organizatio | ı's first secon | l d third fourth | or fifth tax v | | n 501(c)(3) |
| 17 | organization, check this box and stop he l | • | | | | | * , , , |
| Secti | on C. Computation of Public Suppor | | | | | | , _ |
| 15 | Public support percentage for 2013 (line 8 | | | 3 column (f)) | | 15 | % |
| 16 | Public support percentage from 2012 Sch | | | | | 16 | |
| | on D. Computation of Investment Inc | | | | <u></u> | 1 | 70 |
| 17 | Investment income percentage for 2013 (I | | | v line 13. colu | mn (f)) | 17 | % |
| 18 | Investment income percentage from 2012 | | | - | | 18 | |
| 19a | 33 ¹ / ₃ % support tests—2013. If the organi | | | | | | |
| | 17 is not more than 33 ¹ /3%, check this box | | | | | | |
| b | 33 ¹ / ₃ % support tests—2012. If the organiz | _ | = | - | | = | _ |
| ~ | line 18 is not more than 33 ¹ / ₃ %, check this b | | | | | | |
| 20 | Private foundation. If the organization di | | _ | | · · · · · · | | _ |

| Part IV | 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). |
|---------|--|
| | Part II, Line 10 - Revenue is generated from the sale of educational materials. |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

SCHEDULE D (Form 990)

Supplemental Financial Statements

► 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.

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service Name of the organization ► Attach to Form 990.

▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990. **Employer identification number**

| CFIDS | ASSOCIATION OF AMERICA INC | 56-1683450 |
|-------|--|--------------------------------------|
| Par | t I Organizations Maintaining Donor Advised Funds or Other Similar Fund | ls 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 contributions to (during year) . | |
| 3 | Aggregate 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 he | ld in donor advised |
| | funds are the organization's property, subject to the organization's exclusive legal control | |
| 6 | Did the organization inform all grantees, donors, and donor advisors in writing that grant | |
| U | only for charitable purposes and not for the benefit of the donor or donor advisor, or fo | |
| | conferring impermissible private benefit? | |
| Dow | | · · · · · · L Yes L No |
| Par | | |
| | 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). | |
| | ☐ Preservation of land for public use (e.g., recreation or education) ☐ Preservation of | • • |
| | ☐ Protection of natural habitat ☐ Preservation of | a certified historic structure |
| | ☐ Preservation of open space | |
| 2 | Complete lines 2a through 2d if the organization held a qualified conservation contribution | n in the form of a conservation |
| | easement on the last day of the tax year. | Held at the End of the Tax Year |
| а | Total number of conservation easements | . 2 a |
| b | Total acreage restricted by conservation easements | . 2b |
| c | Number of conservation easements on a certified historic structure included in (a) | |
| d | Number of conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements included in (c) acquired after 8/17/06, and not conservation easements ea | |
| - | historic structure listed in the National Register | I I |
| 3 | Number of conservation easements modified, transferred, released, extinguished, or term | |
| | tax year ► | mated by the organization daming the |
| 4 | Number of states where property subject to conservation easement is located ▶ | |
| 5 | Does the organization have a written policy regarding the periodic monitoring, insp | ection handling of |
| 3 | violations, and enforcement of the conservation easements it holds? | |
| | | |
| 6 | Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation e | easements during the year |
| _ | Annual of annual based to be a like the street of the stre | and a district of the control of |
| 7 | Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easer | nents during the year |
| _ | > \$ | 170(1)(4)(D) |
| 8 | Does each conservation easement reported on line 2(d) above satisfy the requirements of | |
| | (i) and section 170(h)(4)(B)(ii)? | |
| 9 | In Part XIII, describe how the organization reports conservation easements in its revenue | |
| | balance sheet, and include, if applicable, the text of the footnote to the organization's final | incial statements that describes the |
| | organization's accounting for conservation easements. | |
| Part | · · · · · · · · · · · · · · · · · · · | 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 | |
| | works of art, historical treasures, or other similar assets held for public exhibition, edu | |
| | 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 re- | evenue statement and balance sheet |
| | works of art, historical treasures, or other similar assets held for public exhibition, edu | |
| | public service, provide the following amounts relating to these items: | |
| | (i) Revenues 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 | · |
| - | following amounts required to be reported under SFAS 116 (ASC 958) relating to these ite | |
| _ | Revenues included in Form 990, Part VIII, line 1 | |
| a | | |
| b | Assets included in Form 990, Part X | 🟲 为 |

| chedu | le D (Form 990) 2013 | | | | | | | | | Page 2 |
|-------|--|----------------------|------------|-------------|----------------|------------|--------------------|------|-------------|---------------|
| Part | Organizations Maintaining | Collections of A | Art, Hist | orical T | reasures | , or Ot | her Similar A | SSE | ets (con | tinued) |
| 3 | Using the organization's acquisition, a collection items (check all that apply): | | | | | | | | | |
| а | ☐ Public exhibition | | d [| Loan | or exchang | ae prog | rams | | | |
| b | Scholarly research | | e [| Other | _ | | | | | |
| c | Preservation for future generations | • | | _ 0.1101 | | | | | | |
| 4 | Provide a description of the organizat XIII. | | nd explai | in how th | ney further | the org | anization's exe | emp | t purpos | e in Part |
| 5 | During the year, did the organization assets to be sold to raise funds rather | | | | | | | | ☐ Yes | ☐ No |
| Part | IV Escrow and Custodial Arra | ngements. | | | | | | | | |
| | Complete if the organization 990, Part X, line 21. | answered "Yes" | to Form | n 990, P | art IV, line | 9, or r | reported an a | moı | unt on F | orm |
| 1a | Is the organization an agent, trustee, | custodian or othe | er interm | ediary fo | r contribut | ions or | other assets | not | | |
| | included on Form 990, Part X? | | | | | | | | ☐ Yes | ☐ No |
| b | If "Yes," explain the arrangement in Pa | art XIII and comple | te the fol | lowing ta | able: | | | | | |
| | | | | | | | | Amo | ount | |
| С | Beginning balance | | | | | 1c | | | | |
| d | Additions during the year | | | | | 1d | | | | |
| e | Distributions during the year | | | | | 1e | | | | |
| | | | | | | 1f | | | | |
| f | Ending balance | | | | | | | | | |
| 2a | Did the organization include an amour | | | | | | | | ☐ Yes | ☐ No |
| | If "Yes," explain the arrangement in Pa | art XIII. Check here | if the ex | planatior | n has been | provide | ed in Part XIII | | | |
| Par | | | | | | | | | | |
| | Complete if the organization | | | | | | | | | |
| | | (a) Current year | (b) Prio | r year | (c) Two year | rs back | (d) Three years ba | ck | (e) Four ye | ars back |
| 1a | Beginning of year balance | 13,346 | | 12,031 | | 12,462 | 11,0 | 87 | | 9,518 |
| b | Contributions | 0 | | 0 | | 0 | | 0 | | 0 |
| С | Net investment earnings, gains, and | | | | | | | | | |
| | losses | 2,078 | | 1,478 | | -288 | 1,5 | 05 | | 2,145 |
| d | Grants or scholarships | 0 | | . 0 | | 0 | · | 0 | | 0 |
| e | Other expenditures for facilities and | | | | | _ | | | | |
| | programs | 0 | | 0 | | 0 | | 0 | | 464 |
| f | Administrative expenses | 159 | | 163 | | 143 | 1 | 30 | | 112 |
| | End of year balance | 15,265 | | 13,346 | | | 12,4 | _ | | |
| g | Provide the estimated percentage of t | | d balanaa | | a aluman /a | 12,031 | | 02 | | 11,087 |
| 2 | | | | e (iiile 1g | , coluitiii (a | i)) Heid a | a 5. | | | |
| а | Board designated or quasi-endowmer | | _% | | | | | | | |
| b | | 35 % | | | | | | | | |
| С | Temporarily restricted endowment | 0 % | | | | | | | | |
| _ | The percentages in lines 2a, 2b, and 2 | | | | | | | | | |
| 3a | Are there endowment funds not in the | possession of the | e organiz | ation tha | at are held | and ad | ministered for | the | _ | |
| | organization by: | | | | | | | | Y | es No |
| | (i) unrelated organizations | | | | | | | | 3a(i) | ' |
| | (ii) related organizations | | | | | | | | 3a(ii) | V |
| b | If "Yes" to 3a(ii), are the related organi | zations listed as re | quired or | n Schedi | ule R? . | | | | 3b | |
| 4 | Describe in Part XIII the intended uses | | | | | | | | | , |
| Part | | | | | | | | | | |
| | Complete if the organization | | to Form | 1990 P | art IV line | 11a S | See Form 990 | . Pa | art X line | e 10 |
| | Description of property | (a) Cost or oth | | | r other basis | | Accumulated | , | (d) Book v | |
| | Description of property | (investme | | ` ' | ther) | | epreciation | | (a) DOOK (| uiuc |
| 4- | Lond | | · - | | · | | | | | |
| 1a | Land | - | 0 | | 0 | | | | | 0 |
| b | Buildings | | 0 | | 0 | | 0 | | | 0 |
| С | Leasehold improvements | . | 0 | | 0 | | 0 | | | 0 |

10,755

0

61,682

. ▶

0

72,437

0

0

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).)

| 3 5 /5 | _ |
|----------------------------|--------|
| Schedule D (Form 990) 2013 | Page • |

| Part VII | Investments - Other Securities | i. | | | | |
|-------------------------|--|--------------------------|------------|--------------------|----------------------|--|
| | Complete if the organization ans | wered "Yes" to For | m 990, | Part IV, line | 11b. See Form | 990, Part X, line 12. |
| | (a) Description of security or category (including name of security) | У | (b) B | Book value | • • | hod of valuation: -of-year market value |
| (1) Financial | derivatives | | | | | |
| (2) Closely-h | neld equity interests | | | | | |
| (3) Other | | | | | | |
| (A) | | | | | | |
| (B) | | | | | | |
| (C) | | | | | | |
| (D) | | | | | | |
| (E) | | | | | | |
| (F) | | | | | | |
| (G) (H) | | | - | | | |
| | a) must agual Farm 000 Part V agu (P) lina 10) | | - | | | |
| Part VIII | b) must equal Form 990, Part X, col. (B) line 12.) ► Investments—Program Related | | | | | |
| Part VIII | Complete if the organization ans | | m 000 | Part IV line | 11c See Form | 000 Part Y line 13 |
| | (a) Description of investment | wered res toron | | Book value | | thod of valuation: |
| | (a) Description of investment | | (5) | SOOK Value | | of-year market value |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| (5) | | | | | | |
| (6) | | | | | | |
| (7) | | | | | | |
| (8) | | | | | | |
| (9) | | | | | | |
| | b) must equal Form 990, Part X, col. (B) line 13.) | | | | | |
| Part IX | Other Assets. | | | | _ | |
| | Complete if the organization ans | | m 990, | Part IV, line | 11d. See Form | |
| | (5 | a) Description | | | | (b) Book value |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| (5) | | | | | | |
| (6) | | | | | | |
| <u>(7)</u> | | | | | | |
| <u>(8)</u> (9) | | | | | | |
| | mn (b) must equal Form 990, Part X, c | ol. (B) line 15.) | | | | |
| Part X | Other Liabilities. | , , | | | | |
| | Complete if the organization ans | wered "Yes" to For | m 990. | Part IV, line | 11e or 11f. See | Form 990, Part X, |
| | line 25. | | , | • | | , , |
| 1. | (a) Description of liability | (b) Book value | | | | |
| (1) Federal in | come taxes | | 0 | | | |
| (2) Obligation | on under capital lease less current | | 12,637 | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| (5) | | | | | | |
| (6) | | | | | | |
| (7) | | | | | | |
| (8) | | | | | | |
| (9) Table (Oateman (| N | | | | | |
| | b) must equal Form 990, Part X, col. (B) line 25.) | | 12,637 | | 1- 6 11-1-1-1 | and a March area and a M |
| | uncertain tax positions. In Part XIII, prov s liability for uncertain tax positions under | | | | | |
| organization | s hability for unicertain tax positions unde | 1 1111 40 (ASC 140). CHE | SUN HEIR I | וו נוופ נפגנ טו נו | ie iootiiote nas bee | en provided in Part XIII |

Schedule D (Form 990) 2013 Page 4 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. Total revenue, gains, and other support per audited financial statements . . . 2,281,889 Amounts included on line 1 but not on Form 990. Part VIII, line 12: 2 0 Donated services and use of facilities 0 Recoveries of prior year grants 0 0 Add lines **2a** through **2d** 2e 3 3 Subtract line **2e** from line **1** 2,281,889 Amounts included on Form 990. Part VIII. line 12, but not on line 1: Investment expenses not included on Form 990. Part VIII, line 7b **4**a 0 0 Add lines 4a and 4b . . . 4c 0 Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.) 5 2,281,889 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. Total expenses and losses per audited financial statements 1 1,470,852 2 Amounts included on line 1 but not on Form 990. Part IX. line 25: 0 Prior year adjustments 2b 0 2c 0 Other (Describe in Part XIII.) 0 Add lines 2a through 2d 2е 0 3 Subtract line **2e** from line **1** 3 1,470,852 Amounts included on Form 990. Part IX. line 25, but not on line 1: Investment expenses not included on Form 990, Part VIII, line 7b 4a 0 Other (Describe in Part XIII.) 4h 0 Add lines **4a** and **4b** 4c 0 Total expenses. Add lines 3 and 4c. (This must equal Form 990. Part I. line 18.) 5 1,470,852 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. Schedule D, Part V, Line 4 - The CFIDS Association of America's Endowment Fund is held at the Foundation for the Carolinas. It is a permanent fund created to ensure the future stability of the Association. The principal of the endowment is never touched, however income generated can be used to support Association programs, if needed. Spendable income has historically been reinvested in the Endowment Fund to increase its balance. Schedule D, Part X, Line 2 - The Association follows the Financial Accounting Standards Board ("FASB") guidance on accounting for uncertainty in income taxes. The Association's policy is to record a liability for any tax position taken that is beneficial to the Association, including any related interest and penalties, when it is more likely than not the position taken by management with respect to a transaction or class of transactions will be overturned by a taxing authority upon examination. Management believes there are no such positions as of December 31, 2013 and, accordingly, no liability has been accrued. Income tax returns filed prior to the year ended December 31, 2010, are no longer subject to audit by the taxing authority.

SCHEDULE F (Form 990)

Statement of Activities Outside the United States

OMB No. 1545-0047

2013

Open to Public Inspection

Department of the Treasury Internal Revenue Service

(2)

(3)

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16. ► Attach to Form 990. ► See separate instructions. ▶ Information about Schedule F (Form 990) and its instructions is at www.irs.gov/form990.

Name of the organization

Employer identification number

| CFIDS | S ASSOCIATION OF AMERICA II | NC | | | | 56-1683450 |
|--------------|---|-------------------------------------|---|---|--|-------------------|
| Part | General Information | on Activiti | es Outside t | the United States. Comp | lete if the organization | answered "Yes" on |
| | Form 990, Part IV, line | 14b. | | | | |
| 1 | For grantmakers. Does the assistance, the grantees' eligrants or assistance? | gibility for the | e grants or as | sistance, and the selection | J | |
| 2 | For grantmakers. Describe assistance outside the Unite Activities per Region. (The fo | ed States. | J | · | | grants and other |
| | (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) a program service, describe specific type of service(s) in region | expenditures for |
| (1) | Sch F, Stmt 1 | | | | | |
| (2) | | | | | | |

| Par | 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. | | | | | | | | | |
|------|---|--|---------------|---|--------------------------|---------------------------------------|---|--|---|--|
| 1 | (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) | |
| (1) | | | Sch F, Stmt 2 | | | | | | | |
| (2) | | | | | | | | | | |
| (3) | | | | | | | | | | |
| (4) | | | | | | | | | | |
| (5) | | | | | | | | | | |
| (6) | | | | | | | | | | |
| (7) | | | | | | | | | | |
| (8) | | | | | | | | | | |
| (9) | | | | | | | | | | |
| (10) | | | | | | | | | | |
| (11) | | | | | | | | | | |
| (12) | | | | | | | | | | |
| (13) | | | | | | | | | | |
| (14) | | | | | | | | | | |
| (15) | | | | | | | | | | |
| (16) | | | | | | | | | | |
| 2 | by the IRS, or | for which the | | ed above that are rectas provided a section | 501(c)(3) equivale | | | • | 1 0 | |

Schedule F (Form 990) 2013

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) 2013 Page 4

Part IV

Foreign Forms

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 ✓ No ☐ Yes 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 Yes ✓ No 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 ✓ No Yes 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 ☐ Yes ✓ No 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)

Schedule F (Form 990) 2013

✓ No

✓ No

Yes

Yes

Schedule F (Form 990) 2013 Page **5**

Part V Supplemental Information

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 F, Part I, Line 2 - The Association awards grants for medical research projects in the field of ME/CFS. To ensure the most worthy |
|---|
| and promising research projects are funded, the Association periodically engages volunteer peer reviewers with direct experience in the |
| disciplines and fields specific to each funding application. Their reviews for scientific and strategic merit are weighed heavily by the |
| Executive Committee of the Board of Directors when making final funding decisions. Applicants and their sponsoring organizations must |
| agree and adhere to the Policies Governing the Award of Research Grants when completing the application form. Grantees approved for |
| |
| funding are required to submit written quarterly reports of the study's progress to the Association's Scientific Director according to the |
| schedule outline in the final letter of award. Grantee organizations are also required to submit interim financial reports to the Association's |
| Chief Financial Officer. Failure to submit required reports by stated deadlines will result in suspension of future quarterly grant |
| disbursements until all outstanding reports are received. Repeated or prolonged delinquency in reporting may result in suspension or |
| withdrawal of support. The Association's Scientific Director may request a site visit or conference call to discuss information contained in |
| interim progress reports and general progress toward stated project milestones. A Research Advisory Council comprised of researchers, |
| physicians and regulatory experts provides guidance on the Association's research strategy to the staff and Board of Directors. It convenes |
| periodically throughout the year. |
| periodicany unoughout the year. |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |

Schedule F, Part V, Statement 1

Form: Schedule F

Page: 1

Line Number: Part I Line 3

CFIDS ASSOCIATION OF AMERICA INC 56-1683450

Accounts and Activities Outside the United States

| | | Offices | Employees | Total | | | |
|------------|--|---------|-----------|--------|--|--|--|
| Region | North America (including Canada and | 0 | 0 | 44,875 | | | |
| | Mexico, but not the United States) | | | | | | |
| Activities | Grantmaking | | | | | | |
| Services | Patrick McGowan, PhD, at the Universi | ty | | | | | |
| | of Toronto Scarborough performs | | | | | | |
| | research building on evidence of | | | | | | |
| | environmental influences that affect the | | | | | | |
| | function of the immune system in ME/C | FS | | | | | |
| | patients. Using samples collected throu | ıgh | | | | | |
| | the SolveCFS BioBank, McGowan look | S | | | | | |
| | for genome-wide epigenetic changes a | nd | | | | | |
| | asses whether these alter the immune | | | | | | |
| | response. This study may uncover nove | el | | | | | |
| | diagnostic and therapeutic biomarkers. | | | | | | |
| | Total: | 0 | 0 | 44,875 | | | |

Schedule F, Part V, Statement 2

Form: Schedule F

Page: 2

Line Number: Part II Line 1

CFIDS ASSOCIATION OF AMERICA INC 56-1683450

Grants To Organization Outside US

| | | Cash Grant | Non-Cash Assistance |
|-----------------------|--|------------|---------------------|
| Region | North America (including Canada and Mexico, but not the United | 44,875 | 0 |
| | States) | | |
| Grant | Patrick McGowan, PhD, at the University of Toronto Scarborough | | |
| | performs research building on evidence of environmental | | |
| | influences that affect the function of the immune system in | | |
| | ME/CFS patients. Using samples collected through the SolveCFS | | |
| | BioBank, McGowan looks for genome-wide epigenetic changes | | |
| | and asses whether these alter the immune response. This study | | |
| | may uncover novel diagnostic and therapeutic biomarkers. | | |
| Cash Disbursement | Check | | |
| Desc. of Non-Cash Ass | st. | | |
| Valuation | | | |

SCHEDULE I (Form 990)

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

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

Department of the Treasury Internal Revenue Service Name of the organization

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22. ► Attach to Form 990. ▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

| CFIDS ASSOCIATION OF AMERICA INC | | | | | | | 56-1683450 |
|---|-----------------|-------------------------------|--------------------------|---------------------------------------|---|--|------------------------------------|
| Part I General Information of | n Grants and | Assistance | | | | · | |
| Does the organization maintain the selection criteria used to av | ward the grants | or assistance? | | | | or the grants or assista | |
| 2 Describe in Part IV the organizaPart II Grants and Other AssPart IV, line 21, for any | istance to Go | vernments and | l Organizations | in the United S | tates. Complete if | | nswered "Yes" to Form 990 |
| 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) Sch I, Stmt 1 | | | | | | | |
| (2) | | | | | | | |
| (3) | | | | | | | |
| (4) | | | | | | | |
| (5) | | | | | | | |
| (6) | | | | | | | |
| (7) | | | | | | | |
| (8) | | | | | | | |
| (9) | | | | | | | |
| (10) | | | | | | | |
| (11) | | | | | | | |
| (12) | | | | | | | |
| 2 Enter total number of section 53 Enter total number of other org | | | | | | | |
| | · | | | | | | <u> </u> |

| Schedule I | (Form 990) (2013) | | | | | Page |
|------------|--|--------------------------|---------------------------|-----------------------------------|---|--|
| Part III | Grants and Other Assistance to In | dividuals in the l | United States. Con | nplete if the organiz | ation answered "Yes" to | Form 990, Part IV, line 22. |
| | Part III can be duplicated if additiona | al space is neede | d. | | | |
| | (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of non-cash assistance |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |
| Part IV | Supplemental Information. Provide | the information r | equired in Part I, lir | ne 2, Part III, columi | n (b), and any other additi | onal information. |
| | e I, Part I, Line 2 - The Association awards gran | | | | | |
| | ciation periodically engages volunteer peer re | | | | | |
| | merit are weighed heavily by the Executive Co | | | | | |
| | ere to the Policies Governing the Award of Res | | | | ~ | |
| | udy's progress to the Association's Scientific I reports to the Association's Chief Financial Of | - | | | | |
| | ing reports are received. Repeated or prolonge | | | | | |
| | or conference call to discuss information conf | | | | | |
| | ers, physicians and regulatory experts provide | | | | | |
| | o o, p | 9 | | on alogy to allo olali all | <u> </u> | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

CFIDS ASSOCIATION OF AMERICA INC 56-1683450

Form: Schedule I

Page: 1

Line Number: Part II

Description of Grants and Other Assistance to Governments and Organizations in the United States

| | | Recipient EIN | Amt. of cash grant | Amt. of non- cash asst. |
|--|---|---------------|--------------------|----------------------------|
| Name and address | University of Wisconsin - Madison Dane Cook PhD 2000 Observatory Dr Gymnatorium Natatorium Madison, WI 53706 | 39-6006492 | 66,667 | 0 |
| IRC code section Method of valuation Desc. of Non-Cash Asst. | 501(c)(3) | | | |
| Purpose of grant | Dane Cook, PhD, at the University of Wisconsin - Madison has teamed with Alan Light of the University of Utah and Gordon Broderick of the University of Alberta to link information gathered from exercise testing, brain imaging and gene expression markers in the blood to understand post-exertional relapse, a hallmark feature of ME/CFS. This project will attempt to validate blood and brain markers independently identified by these investigators in earlier studies. | | | |
| Name and address | New York Medical College Marvin Medow PhD 19 Bradhurst Ave Suite 1600 South Hawthorne, NY 10532 | 11-3109942 | 50,000 | 0 |
| IRC code section Method of valuation | 501(c)(3) | | | |
| Desc. of Non-Cash Asst. Purpose of grant | Marvin S. Medow, PhD, at New York Medical College in Valhalla, NY, continues his work that shows orthostatic challenge, such as prolonged upright posture, leads to problems with memory, concentration and information processing in ME/CFS patients. After measuring brain blood flow during a head upright tilt test while testing cognitive ability, he will test three interventions to identify mechanisms to improve neurocognitive impairment. | | | |
| Name and address | The Johns Hopkins University Peter Rowe MD 200 N Wolfe St Room 2077 David Rubenstein Child Health Bldg Baltimore, MD 21287 | 52-0595110 | 47,158 | 0 |
| IRC code section Method of valuation Desc. of Non-Cash Asst. | 501(c)(3) | | | |
| Purpose of grant | Peter Rowe, MD, at Johns Hopkins Children's Center observed that simple movements like a straight leg lift can trigger fatigue and brain fog in ME/CFS patients. Dr. Rowe's group hypothesizes that the underlying mechanism is similar to fibromyalgia pain, where nerves become extra sensitive to stimulation, a process known as central sensitization. His work will be among the first to explore the possible link between fatigue, cognition and central sensitization. The results are expected to identify a subset of patients who will benefit from a different therapeutic approach. | | | |

SCHEDULE M (Form 990)

Noncash Contributions

OMB No. 1545-0047

Open To Public

Department of the Treasury Internal Revenue Service

► Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

▶ Information about Schedule M (Form 990) and its instructions is at www.irs.gov/form990.

Inspection

Name of the organization **Employer identification number** CFIDS ASSOCIATION OF AMERICA INC 56-1683450

| Part | 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 | Method o | | | _ |
| 1 | Art—Works of art | | | r onn 330, r art viii, iine 1g | | | | |
| 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 | | | | | | | |
| 8 | Intellectual property | | | | | | | |
| 9 | Securities—Publicly traded | V | 8 | 601,736 | FMV | | | |
| 10 | Securities—Closely held stock . | | | 33.17.00 | | | | |
| 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 ► () | | | | | | | |
| 26 | Other ► (| | | | | | | |
| 27 | Other ► () | | | | | | | |
| 28 | Other ► (| less Alexandra | | fau aantuibutiana fau | | | | |
| 29 | Number of Forms 8283 received which the organization completed | | | | 00 | | | |
| | which the organization completed | 1 01111 0200 | o, i ait iv, bonce / toknowiet | agement | 29 | | Yes | No |
| 30a | During the year, did the organizat | ion rocciuo | by contribution any proper | ty reported in Dort Lilings | 1 20 that | | 103 | |
| Sua | it must hold for at least three year | | | | | | | |
| | used for exempt purposes for the | | | | | 30a | | ~ |
| b | If "Yes," describe the arrangemen | | 3 P | | · | Jua | | - |
| 31 | Does the organization have a | | stance policy that require | s the review of any no | n-standard | | | |
| ٠. | | | | | | 31 | | ~ |
| 32a | Does the organization hire or use | | | | ell noncash | | | |
| | | - | | • | | 32a | | ~ |
| b | If "Yes," describe in Part II. | | | | | J_U | | |
| 33 | If the organization did not report a | n amount in | column (c) for a type of pro | perty for which column (a) i | s checked. | | | |
| - | describe in Part II. | | () | , , , | , | | | |

Schedule M (Form 990) (2013) Supplemental Information. 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.

SCHEDULE 0 (Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

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

OMB No. 1545-0047

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

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

Open to Public Inspection

| CFIDS ASSOCIATION OF AMERICA INC | 56-1683450 |
|--|--------------------------------------|
| Form 990, Part III, Line 4a - The Association received in-kind legal services related to its research prog | ram, board governance and |
| employment counsel totaling \$105,961. | |
| | |
| | |
| Form 990, Part VI, Section B, Line 11b - The Financial Oversight Committee (FOC) is responsible for re | |
| and providing comments prior to it being submitted to the IRS. The FOC consists of the Board Chair, I | |
| President & CEO and Chief Financial Officer. All members of the Board of Directors receive a copy of | the reviewed tax return prior to |
| submission to the IRS but are not required to provide comments. | |
| | |
| Form 990, Part VI, Section B, Line 12c - Each Director, Officer and committee member with governing I | Board delegated powers annually |
| sign a statement which affirms such person has: received a copy of the Conflict of Interest policy, reactions. | |
| to comply with the policy; and understands the Association is a charitable organization and in order to | |
| status, must engage primarily in activities which accomplish one or more of its tax-exempt purposes. | |
| | |
| | |
| Form 990, Part VI, Section B, Line 15 - Employees of the Association undergo periodic performance ar | |
| Compensation level is determined upon performance, market and the financial position of the Associa | |
| increases follow a 4-6% trend. The President & CEO and the Chief Financial Officer perform all reviews | |
| President & CEO which is done by members of the Professional Staff Recruiting and Compensation C | |
| is comprised of the Executive Committee of the Board of Directors. To ensure salary compensation is | |
| the committee consults with published salary surveys, including but not limited to GuideStar and the | |
| reviews include a written document which is discussed in person with the employee. Employees also | |
| an evaluation of their immediate supervisor. Written reviews and self-assessments are kept in each en | nployee's personnel file in a locked |
| cabinet in the Chief Financial Officer's office. | |
| | |
| Form 990, Part VI, Section C, Line 19 - The Association's tax return and Annual Report are available or | its website - www.SolveCFS.org. |
| These reports are also available on Guidestar's website for visitors to that organization. Upon request | |
| copies of its audited Financial Statements, Form 1023, governing By-Laws and Conflict of Interest Poli | |
| | |
| | |
| Form 990, Part IX, Line 11g - Engagement and Communications expenses - Total \$157,630; Program \$ | |
| \$29,940. Executive Search for new President & CEO - Total \$38,504; Program \$26,308, Management an | d General \$3,652 and Fundraising |
| expenses \$8,543. | |
| | |
| Form 990, Part XI, Line 9 - The Association incurred a loss of \$1,968 on disposal of assets. | |
| FOITH 770, Part XI, Line 7 - The Association incurred a loss of \$1,700 off disposal of assets. | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Schedule O, Statement 1

CFIDS ASSOCIATION OF AMERICA INC Form: 990 56-1683450 Page: 2

Line Number: Part III Line 4a

First Program Service Accomplishments Description

Description

to identify a cause, we are also identifying treatments that can help restore function and alleviate symptoms of ME/CFS. While we work towards a cure we must develop disease-modifying treatments. Defining ME/CFS - Diseases must be clearly and unambiguously defined so that causes, and the cures can be discovered. We partnered with Lenny Jason of DePaul University to use the data from the SolveCFS BioBank to help refine how ME/CFS is defined. This research will help identify the "core signs and symptoms" of ME/CFS so that the disease can be measured the same way by all investigators. The CFIDS Association of America is working on a partnership with a real-time online platform where people can connect with fellow patients and expand our capacity for patient centered outcomes research through their shared data. The data can help researchers better understand the nature of the illness, detect patterns, and develop more effective therapies. Partnering, combining,g and growing our community, we will create a big data set of "well-defined and reliable" patient-reported outcome measures to provide evidence of treatment benefit. Managing, understanding and using this kind of big ME/CFS data will be key to innovating the effective treatment for ME/CFS patients. Software tools - We have partnered with a biotech company to build a digital library - one centralized knowledge base - of all the ME/CFS medical literature and all open source biological data sets. This digital library brings the information to one place and translates it into a standard form. Software is under development to integrate this knowledge in order to generate theories that can lead to therapies.

Page: 1

Schedule O, Statement 2

CFIDS ASSOCIATION OF AMERICA INC 56-1683450

Form: 990 Page: 2

Line Number: Part III Line 4b

Second Program Service Accomplishments Description

Description

the US. Meeting in homes and offices, restaurants and community rooms, Association staff members are bringing details about our research program and its impact to people who are most affected by ME/CFS.

SCHEDULE R (Form 990)

Part I

Related Organizations and Unrelated Partnerships ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37. OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

▶ Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

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

Open to Public Inspection Employer identification number

CFIDS ASSOCIATION OF AMERICA INC

56-1683450

| | Name, address, and EIN (if applicable) of disregarded entity | | Primary activity | Legal domicile (state or foreign country) | Total income | End-of-year assets | Direct con entit | |
|---------|--|--|---------------------------|---|--------------------------|---------------------------|---------------------|---------------------------------------|
| (1) | | | | | | | | |
| (2) | | | | | | | | |
| (3) | | | | | | | | |
| (4) | | | | | | | | |
| (5) | | | | | | | | |
| (6) | | | | | | | | |
| Part II | Identification of Related Tax-Exempt Organiza | ations Complete | if the organization | anawarad "Vaa" a | a Form 000 Day | t IV line 24 bees | use it be | |
| | one or more related tax-exempt organizations du | iring the tax year | ii iile organization | answered res o | ii Foriii 990, Fai | t iv, line 34 beca | iuse ii na | a |
| | Identification of Related Tax-Exempt Organizations one or more related tax-exempt organizations du (a) Name, address, and EIN of related organization | ring the tax year (b) Primary activity | | (d) ate Exempt Code sectio | | (f) us Direct controlling | g Section cont | (g) 512(b)(13) trolled tity? |
| | (a) | (b) | (c) Legal domicile (st | (d) ate Exempt Code sectio | (e) Public charity stat | (f) us Direct controlling | g Section cont | (g) 512(b)(13) trolled |
| (1) | (a) | (b) | (c) Legal domicile (st | (d) ate Exempt Code sectio | (e) Public charity stat | (f) us Direct controlling | g Section cont | (g) 512(b)(13) trolled tity? |
| (1) | (a) | (b) | (c) Legal domicile (st | (d) ate Exempt Code sectio | (e) Public charity stat | (f) us Direct controlling | g Section cont | (g) 512(b)(13) trolled tity? |
| (1) | (a) Name, address, and EIN of related organization | (b) | (c) Legal domicile (st | (d) ate Exempt Code sectio | (e) Public charity stat | (f) us Direct controlling | g Section cont | (g) 512(b)(13) trolled tity? |
| (1) | (a) Name, address, and EIN of related organization | (b) | (c) Legal domicile (st | (d) ate Exempt Code sectio | (e) Public charity stat | (f) us Direct controlling | g Section cont | (g) 512(b)(13) trolled tity? |

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 | Disprop | h) ortionate ations? | (i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065) | managing partner? | | (k) Percentage ownership |
|--|----------------------|---|-------------------------------|---|---------------------------------|--|---------|----------------------------|---|-------------------|----|--------------------------------|
| | | | | | | | Yes | No | | 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) | (e) Type of entity (C corp, S corp, or trust) | (f) | (g) Share of end-of-year assets | (h) Percentage ownership | (i) Section 512(b)(13 controlled entity? | |
|--|-------------------------|---|-----|---|-----|---------------------------------------|--------------------------------|---|----|
| | | | | | | | | Yes | No |
| (1) See Schedule R, Part VII, Statement 1 | | | | | | | | | |
| (2) | | | | | | | | | |
| (3) | | | | | | | | | |
| (4) | | | | | | | | | |
| (5) | | | | | | | | | |
| (6) | | | | | | | | | |
| (7) | | | | | | | | | |

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

| Not | ote. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule. | | | | Yes | No |
|--------|--|----------------------|------------------|--------------------|-----------|----------|
| 1 | During the tax year, did the organization engage in any of the following transactions with one or more related organizations | listed in Parts | s II–IV? | | | |
| а | a Receipt of (i) interest (ii) annuities (iii) royalties or (iv) rent from a controlled entity | | | 1a | | ~ |
| b | b Gift, grant, or capital contribution to related organization(s) | | | 1b | | ~ |
| С | c Gift, grant, or capital contribution from related organization(s) | | | 1c | | ~ |
| d | | | | | | ~ |
| е | | | | | | ~ |
| | | | | | | |
| f | f Dividends from related organization(s) | | | 1f | | / |
| g | | | | | | ~ |
| h | | | | | | ~ |
| i | i Exchange of assets with related organization(s) | | | | | ~ |
| ÷ | j Lease of facilities, equipment, or other assets to related organization(s) | | | | | ~ |
| , | | | | ., | | |
| k | k Lease of facilities, equipment, or other assets from related organization(s) | | | 1k | | ~ |
| ı | Performance of services or membership or fundraising solicitations for related organization(s) | | | | | |
| ı m | m Performance of services or membership or fundraising solicitations by related organization(s) | | | | | ~ |
| | | | | | | ~ |
| n | o Sharing of paid employees with related organization(s) | | | | | ~ |
| O | 5 Sharing of paid employees with related organization(s) | | | 10 | | _ |
| _ | Pointhursement noid to related expeniantion(a) for expenses | | | 1 | | |
| p | r | | | | | <u> </u> |
| q | q Reimbursement paid by related organization(s) for expenses | | | 1q | | |
| _ | Management of analysis are an appropriate and a second associated association (a) | | | 4 | | |
| S | Contract of the contract of the c | | | | | <u> </u> |
| | | | | | | |
| 2 | , | | isnips and trans | | esnoid | ds. |
| | (a) Name of related organization (b) Transaction Amon type (a-s) | (c) ount involved | Method of deterr | (d) mining amou | ınt invol | ved |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| , | | | | | | |
| (4) | | | | | | |
| (5) | | | | | | |
| | | | | | | |
| (6) | | | | | | |
| | | | | | | |

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

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

| | (a) Name, address, and EIN of entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Predominant income (related, unrelated, excluded from tax under | Are all sec 501 | partners ction (c)(3) zations? | (f) Share of total income | (g) Share of end-of-year assets | Disprop | h) ortionate ttions? | (i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065) | Gene mana parti | ral or aging | (k) Percentage ownership |
|------|--------------------------------------|-------------------------|--|---|-----------------------|---|---------------------------------|--|---------|----------------------------|---|-----------------------|-----------------|--------------------------------|
| | | | | sections 512-514) | Yes | No | | | Yes | No | | Yes | No | |
| (1) | | | | | | | | | | | | | | |
| (2) | | | | | | | | | | | | | | |
| (3) | | | | | | | | | | | | | | |
| (4) | | | | | | | | | | | | | | |
| (5) | | | | | | | | | | | | | | |
| (6) | | | | | | | | | | | | | | |
| (7) | | | | | | | | | | | | | | |
| (8) | | | | | | | | | | | | | | |
| (9) | | | | | | | | | | | | | | |
| (10) | | | | | | | | | | | | | | |
| (11) | | | | | | | | | | | | | | |
| (12) | | | | | | | | | | | | | | |
| (13) | | | | | | | | | | | | | | |
| (14) | | | | | | | | | | | | | | |
| (15) | | | | | | | | | | | | | | |
| (16) | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | 000) 0010 |

| Schedule R (F | orm 990) 2013 Pa | | | | | | | |
|---------------|--|---|--|--|--|--|--|--|
| Part VII | Supplemental Information Provide additional information for responses to questions on Schedule R (see instructions). | _ | | | | | | |
| - | Trovide additional information for responses to questions on senedule in (see instructions). | _ | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Schedule R, Part VII, Statement 1

CFIDS ASSOCIATION OF AMERICA INC 56-1683450

Form: Schedule R

Page: 2

Line Number: Part IV

Description of Related Organizations Taxable as a Corporation or Trust

| | | Share of total Share of end- | | PercentageControlled |
|---------------------------|--|------------------------------|-------------------|----------------------|
| | | income | of-year assets | ownershipOrg |
| Name and EIN | Innovative Research Company (46-3580047) | 0 | 0 | 100%Yes |
| Address | 6827 Fairview Road Suite C | | | |
| | Charlotte, NC 28210 | | | |
| Primary activity | Holding company | | | |
| State or foreign country | DE | | | |
| Direct controlling entity | CFIDS Association of America Inc | | | |
| Type of entity | С | | | |