

## Texas - Severe Winter Storms

## Return of Organization Exempt From Income Tax

OMB No 1545-0047

2019

Open to Public Inspection

Form 990

(Rev. January 2020)

Department of the Treasury  
Internal Revenue Service

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

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

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

A For the 2019 calendar year, or tax year beginning 07/01, 2019, and ending 06/30, 2020

## B Check if applicable

|                          |                         |
|--------------------------|-------------------------|
| <input type="checkbox"/> | Address change          |
| <input type="checkbox"/> | Name change             |
| <input type="checkbox"/> | Initial return          |
| <input type="checkbox"/> | Final return/terminated |
| <input type="checkbox"/> | Amended return          |
| <input type="checkbox"/> | Application pending     |

C Name of organization ALLIED PILOTS ASSOCIATION

HANK COFIELD

Doing business as

Number and street (or P.O. box if mail is not delivered to street address)

14600 TRINITY BOULEVARD, STE 500

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

FORT WORTH, TX 76155-2512

F Name and address of principal officer ERIC FERGUSON

14600 TRINITY BLVD, STE 500, FORT WORTH, TX 76155

D Employer identification number

13-1982245

E Telephone number

(817) 302-2272

G Gross receipts \$ 85,414,798.

H(a) Is this a group return for subordinates? Yes ☐ No ☒H(b) Are all subordinates included? Yes ☐ No ☐

If "No," attach a list (see instructions)

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

J Website WWW.ALLIEDPILOTS.ORG

H(c) Group exemption number

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

L Year of formation 1963

M State of legal domicile TX

## Part I Summary

|                             |                                                                |                                                                                                                                                                                  |                           |              |
|-----------------------------|----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------|
| Activities & Governance     | 1                                                              | Briefly describe the organization's mission or most significant activities TO OPERATE A NON-PROFIT EMPLOYEE REPRESENTING ASSOCIATION, A LABOR UNION SEE SCHEDULE O, ATTACHMENT 1 |                           |              |
|                             | 2                                                              | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets                                           |                           |              |
|                             | 3                                                              | Number of voting members of the governing body (Part VI, line 1a)                                                                                                                | 3                         | 20.          |
|                             | 4                                                              | Number of independent voting members of the governing body (Part VI, line 1b)                                                                                                    | 4                         | 20.          |
|                             | 5                                                              | Total number of individuals employed in calendar year 2019 (Part V, line 2a)                                                                                                     | 5                         | 89.          |
|                             | 6                                                              | Total number of volunteers (estimate if necessary)                                                                                                                               | 6                         | 414.         |
|                             | 7a                                                             | Total unrelated business revenue from Part VIII, column (C), line 12                                                                                                             | 7a                        | 0.           |
| b                           | Net unrelated business taxable income from Form 990-T, line 39 | 7b                                                                                                                                                                               | 0.                        |              |
| Revenue                     | 8                                                              | Contributions and grants (Part VIII, line 1h)                                                                                                                                    | Prior Year                | Current Year |
|                             | 9                                                              | Program service revenue (Part VIII, line 2g)                                                                                                                                     | 41,776,637.               | 47,475,171.  |
|                             | 10                                                             | Investment income (Part VIII, column (A), lines 3, 4, and 7d)                                                                                                                    | 7,426,936.                | 9,163,925.   |
|                             | 11                                                             | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)                                                                                                         | 1,648,177.                | 2,736,354.   |
|                             | 12                                                             | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)                                                                                               | 665,371.                  | 607,682.     |
|                             | 13                                                             | Grants and similar amounts paid (Part IX, column (A), lines 1-3)                                                                                                                 | 51,517,121.               | 59,983,132.  |
|                             | 14                                                             | Benefits paid to or for members (Part IX, column (A), line 4)                                                                                                                    | 63,997.                   | 61,000.      |
| Expenses                    | 15                                                             | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)                                                                                                | 0.                        | 0.           |
|                             | 16a                                                            | Professional fundraising fees (Part IX, column (A), line 11e)                                                                                                                    | 35,553,633.               | 41,717,097.  |
|                             | b                                                              | Total fundraising expenses (Part IX, column (D), line 25)                                                                                                                        | 0.                        | 0.           |
|                             | 17                                                             | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)                                                                                                                     | 0.                        | 0.           |
|                             | 18                                                             | Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)                                                                                                         | 8,609,140.                | 11,806,185.  |
|                             | 19                                                             | Revenue less expenses Subtract line 18 from line 12                                                                                                                              | 44,226,770.               | 53,584,282.  |
|                             | 20                                                             | Total assets (Part X, line 16)                                                                                                                                                   | 7,290,351.                | 6,398,850.   |
| Net Assets or Fund Balances | 21                                                             | Total liabilities (Part X, line 26)                                                                                                                                              | Beginning of Current Year | End of Year  |
|                             | 22                                                             | Net assets or fund balances Subtract line 21 from line 20                                                                                                                        | 68,440,633.               | 75,113,015.  |
|                             |                                                                |                                                                                                                                                                                  | 16,577,103.               | 20,154,837.  |

## Part II Signature Block

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

|           |                      |                     |
|-----------|----------------------|---------------------|
| Sign Here | Signature of officer | 06/11/2021          |
|           | PATRICK D. CLARK     | SECRETARY/TREASURER |

|                        |                            |                       |                                                                     |                                                 |           |
|------------------------|----------------------------|-----------------------|---------------------------------------------------------------------|-------------------------------------------------|-----------|
| Paid Preparer Use Only | Print/Type preparer's name | Preparer's signature  | Date                                                                | Check <input type="checkbox"/> if self-employed | PTIN      |
|                        | JAMIE EVERSELE             |                       | 06/11/2021                                                          |                                                 | P00839244 |
|                        | Firm's name BDO USA, LLP   | Firm's EIN 13-5381590 | Firm's address 301 COMMERCE STREET, SUITE 2000 FORT WORTH, TX 76102 | Phone no 817-738-2400                           |           |

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

For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2019)

**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☐ Yes ☒ No**1** Briefly describe the organization's mission

ATTACHMENT 1

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

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

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

If "Yes," describe these changes on Schedule O

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )PROTECTION OF THE INDIVIDUAL AND COLLECTIVE RIGHTS OF THE MEMBERS  
OF APA AND PROMOTION OF THEIR PROFESSIONAL INTEREST. COLLECTIVE  
BARGAINING AND NEGOTIATION ON BEHALF OF THE PILOTS OF AMERICAN  
AIRLINES. INCLUDING, BUT NOT LIMITED TO, AGREEMENTS COVERING RATES  
OF PAY, RULES & WORKING CONDITIONS.**4b** (Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

PROVISION OF MUTUAL AID PLANS FOR THE PILOTS OF AMERICAN AIRLINES.

**4c** (Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )SPONSOR AND SUPPORT OF LEGISLATION AND APPROPRIATE REGULATIONS  
AFFECTING THE PILOTS OF AMERICAN AIRLINES AND THE INDUSTRY WHICH  
MAY BE BENEFICIAL TO THE PROFESSION AND/OR INDUSTRY AND THE  
DISSEMINATION OF INFORMATION TO ENHANCE THE PROFESSIONAL STATUS OF  
THE MEMBERSHIP.**4d** Other program services (Describe on Schedule O )

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

**4e** Total program service expenses ▶

**Part IV Checklist of Required Schedules**

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

**Part IV Checklist of Required Schedules (continued)**

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

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

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

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

|                                                                                                                                                                                                                                                                | Yes         | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|----|
| <b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. . . . . <b>2a</b> 89                                                  |             |    |
| <b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?<br><b>Note:</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions). . . . .           | <b>2b</b> X |    |
| <b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .                                                                                                                                              | <b>3a</b>   | X  |
| <b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O . . . . .                                                                                                                                 | <b>3b</b>   |    |
| <b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . . . | <b>4a</b>   | X  |
| <b>b</b> If "Yes," enter the name of the foreign country ▶<br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)                                                                               |             |    |
| <b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .                                                                                                                                      | <b>5a</b>   | X  |
| <b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?                                                                                                                                      | <b>5b</b>   | X  |
| <b>c</b> If "Yes" to line 5a or 5b, did the organization file Form 8886-T? . . . . .                                                                                                                                                                           | <b>5c</b>   |    |
| <b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .                                    | <b>6a</b> X |    |
| <b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .                                                                                               | <b>6b</b> X |    |
| <b>7 Organizations that may receive deductible contributions under section 170(c).</b>                                                                                                                                                                         |             |    |
| <b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .                                                                                             | <b>7a</b>   |    |
| <b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .                                                                                                                                             | <b>7b</b>   |    |
| <b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .                                                                                                        | <b>7c</b>   |    |
| <b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year . . . . . <b>7d</b>                                                                                                                                                                 |             |    |
| <b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?                                                                                                                                       | <b>7e</b>   |    |
| <b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .                                                                                                                                | <b>7f</b>   |    |
| <b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?                                                                                                                      | <b>7g</b>   |    |
| <b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .                                                                                                          | <b>7h</b>   |    |
| <b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .                                                     | <b>8</b>    |    |
| <b>9 Sponsoring organizations maintaining donor advised funds.</b>                                                                                                                                                                                             |             |    |
| <b>a</b> Did the sponsoring organization make any taxable distributions under section 4966? . . . . .                                                                                                                                                          | <b>9a</b>   |    |
| <b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .                                                                                                                                           | <b>9b</b>   |    |
| <b>10 Section 501(c)(7) organizations.</b> Enter                                                                                                                                                                                                               |             |    |
| <b>a</b> Initiation fees and capital contributions included on Part VIII, line 12 . . . . . <b>10a</b>                                                                                                                                                         |             |    |
| <b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . . . . . <b>10b</b>                                                                                                                                      |             |    |
| <b>11 Section 501(c)(12) organizations.</b> Enter                                                                                                                                                                                                              |             |    |
| <b>a</b> Gross income from members or shareholders . . . . . <b>11a</b>                                                                                                                                                                                        |             |    |
| <b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them) . . . . . <b>11b</b>                                                                                                      |             |    |
| <b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?                                                                                                                                          | <b>12a</b>  |    |
| <b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year . . . . . <b>12b</b>                                                                                                                                            |             |    |
| <b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>                                                                                                                                                                                     |             |    |
| <b>a</b> Is the organization licensed to issue qualified health plans in more than one state? . . . . . <b>13a</b>                                                                                                                                             |             |    |
| <b>Note:</b> See the instructions for additional information the organization must report on Schedule O                                                                                                                                                        |             |    |
| <b>b</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 . . . . . <b>13b</b>                                                                        |             |    |
| <b>c</b> Enter the amount of reserves on hand . . . . . <b>13c</b>                                                                                                                                                                                             |             |    |
| <b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? . . . . .                                                                                                                                                | <b>14a</b>  | X  |
| <b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O . . . . .                                                                                                                                   | <b>14b</b>  |    |
| <b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? . . . . .                                                                                 | <b>15</b>   |    |
| If "Yes," see instructions and file Form 4720, Schedule N                                                                                                                                                                                                      |             |    |
| <b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? . . . . .                                                                                                                            | <b>16</b>   |    |
| If "Yes," complete Form 4720, Schedule O                                                                                                                                                                                                                       |             |    |

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

### Section A. Governing Body and Management

|                                                                                                                                                                                                                               | Yes | No |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a Enter the number of voting members of the governing body at the end of the tax year . . . . .                                                                                                                              | 20  |    |
| If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O              |     |    |
| b Enter the number of voting members included on line 1a, above, who are independent . . . . .                                                                                                                                | 20  |    |
| 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .                                             | X   |    |
| 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? . . . . . |     | X  |
| 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .                                                                                                  |     | X  |
| 5 Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .                                                                                                        |     | X  |
| 6 Did the organization have members or stockholders? . . . . .                                                                                                                                                                | X   |    |
| 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .                                                               | X   |    |
| b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .                                                         |     | X  |
| 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following                                                                                            |     |    |
| a The governing body? . . . . .                                                                                                                                                                                               | X   |    |
| b Each committee with authority to act on behalf of the governing body? . . . . .                                                                                                                                             | X   |    |
| 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O. . . . .       |     | X  |

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

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

### Section C. Disclosure

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

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

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records ►  
 HANK COFIELD 14600 TRINITY BLVD, STE 500 FORT WORTH, TX 76155-2512 817-302-2222

**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 ☒ X**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.

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

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

| (A)<br>Name and title                              | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|----------------------------------------------------|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                    |                                                                                            | Individual trustee or director                                                                               | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| (1) JIM CLARK<br>SR. DIRECTOR OF LEGAL AFFAIRS     | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 495,213.                                                             | 0.                                                                        | 0.                                                                                            |
| (2) RAY DUKE<br>DIRECTOR-SAFETY & TRAINING         | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 231,093.                                                             | 0.                                                                        | 50,155.                                                                                       |
| (3) GREGG OVERMAN<br>DIRECTOR-COMMUNICATIONS       | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 224,782.                                                             | 0.                                                                        | 49,839.                                                                                       |
| (4) MARK MYERS<br>DIRECTOR-PILOT NEGOTIATIONS      | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 222,372.                                                             | 0.                                                                        | 49,719.                                                                                       |
| (5) ANDREA DUFF<br>EXECUTIVE DIRECTOR              | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 229,800.                                                             | 0.                                                                        | 42,073.                                                                                       |
| (6) TRICIA KENNEDY<br>DIRECTOR-DISPUTES RESOLUTION | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 216,484.                                                             | 0.                                                                        | 26,660.                                                                                       |
| (7) HENRY COFIELD<br>DIRECTOR-FINANCE & ACCOUNTING | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 200,058.                                                             | 0.                                                                        | 25,839.                                                                                       |
| (8) SCOTT HECKENBERGER<br>VICE CHAIRMAN NEW YORK   | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 185,049.                                                             | 0.                                                                        | 29,608.                                                                                       |
| (9) JOSE LOPEZ<br>DIRECTOR OF IT                   | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 157,038.                                                             | 0.                                                                        | 44,139.                                                                                       |
| (10) DON IORIO<br>CHAIRMAN CHARLOTTE               | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 167,004.                                                             | 0.                                                                        | 26,721.                                                                                       |
| (11) MARK BURDICK<br>FORMER CHAIRMAN PHOENIX       | 16.00<br>0.                                                                                |                                                                                                              |                       |         |              |                              | X      | 165,230.                                                             | 0.                                                                        | 26,437.                                                                                       |
| (12) JM JOSEY WALES<br>VICE CHAIRMAN DALLAS        | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 163,603.                                                             | 0.                                                                        | 26,177.                                                                                       |
| (13) MARCY SCOTT<br>DIRECTOR-BENEFITS              | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 163,648.                                                             | 0.                                                                        | 21,302.                                                                                       |
| (14) WELDON RATLIFF<br>APPLICATION DEVELOP MANAGER | 40.00<br>0.                                                                                |                                                                                                              |                       |         |              | X                            |        | 136,709.                                                             | 0.                                                                        | 45,435.                                                                                       |

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

| (A)<br>Name and title                                          | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|----------------------------------------------------------------|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                |                                                                                            | Individual trustee or director                                                                               | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| (15) JONATHAN ELIFSON<br>DIRECTOR-LEGAL AFFAIRS                | 40.00<br>0.                                                                                |                                                                                                              |                       |         | X            |                              |        | 166,667.                                                             | 0.                                                                        | 8,513.                                                                                        |
| (16) PAUL MUSIC<br>FORMER VICE CHAIRMAN PHL                    | 16.00<br>0.                                                                                |                                                                                                              |                       |         |              |                              | X      | 150,885.                                                             | 0.                                                                        | 24,142.                                                                                       |
| (17) BILLY RAY READ<br>CHAIRMAN MIAMI                          | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 145,628.                                                             | 0.                                                                        | 23,300.                                                                                       |
| (18) PAUL DIORIO<br>CHAIRMAN PHILADELPHIA                      | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 143,067.                                                             | 0.                                                                        | 22,891.                                                                                       |
| (19) DAVID RINTEL<br>VICE CHAIRMAN MIAMI                       | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 138,816.                                                             | 0.                                                                        | 22,211.                                                                                       |
| (20) RUSSELL THOMPSON<br>LEAD APPLICATION DEVELOPER            | 40.00<br>0.                                                                                |                                                                                                              |                       |         |              | X                            |        | 136,789.                                                             | 0.                                                                        | 22,610.                                                                                       |
| (21) CHRISTINA PAPADOPOULOS<br>PILOT NEGOTIATIONS ATTORNEY     | 40.00<br>0.                                                                                |                                                                                                              |                       |         |              | X                            |        | 136,178.                                                             | 0.                                                                        | 22,512.                                                                                       |
| (22) DANIEL CAREY<br>FORMER PRESIDENT                          | 39.00<br>1.00                                                                              |                                                                                                              |                       |         |              |                              | X      | 134,989.                                                             | 0.                                                                        | 21,598.                                                                                       |
| (23) HUGH FENWICK<br>CHAIRMAN LOS ANGELES                      | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 127,612.                                                             | 0.                                                                        | 20,418.                                                                                       |
| (24) DAVID POWELL<br>VICE CHAIRMAN CHICAGO                     | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 126,809.                                                             | 0.                                                                        | 20,289.                                                                                       |
| (25) VICKI DILLIVAN<br>SCHEDULING & CONTRACT SUPPORT           | 40.00<br>0.                                                                                |                                                                                                              |                       |         |              | X                            |        | 124,539.                                                             | 0.                                                                        | 21,724.                                                                                       |
| <b>1b Sub-total</b>                                            |                                                                                            |                                                                                                              |                       |         |              |                              |        | 4,490,062.                                                           | 0.                                                                        | 694,312.                                                                                      |
| <b>c Total from continuation sheets to Part VII, Section A</b> |                                                                                            |                                                                                                              |                       |         |              |                              |        | 1,530,104.                                                           | 0.                                                                        | 246,799.                                                                                      |
| <b>d Total (add lines 1b and 1c)</b>                           |                                                                                            |                                                                                                              |                       |         |              |                              |        | 6,020,166.                                                           | 0.                                                                        | 941,111.                                                                                      |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **31**

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

|          | Yes | No |
|----------|-----|----|
| <b>3</b> | X   |    |
| <b>4</b> | X   |    |
| <b>5</b> |     | X  |

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

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

**Section B. Independent Contractors**

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

| (A)<br>Name and business address | (B)<br>Description of services | (C)<br>Compensation |
|----------------------------------|--------------------------------|---------------------|
| ATTACHMENT 2                     |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |

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

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

| (A)<br>Name and title                                          | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|----------------------------------------------------------------|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                |                                                                                            | Individual trustee or director                                                                               | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| (26) KIM PINAROC<br>LEGAL ADMINISTRATOR                        | 40.00<br>0.                                                                                |                                                                                                              |                       |         |              | X                            |        | 122,759.                                                             | 0.                                                                        | 21,624.                                                                                       |
| (27) PETER GAMBLE<br>CHAIRMAN BOSTON                           | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 116,164.                                                             | 0.                                                                        | 18,586.                                                                                       |
| (28) MICHAEL BURR<br>CHAIRMAN NEW YORK                         | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 116,122.                                                             | 0.                                                                        | 18,580.                                                                                       |
| (29) CALVIN DILKS<br>VICE CHAIRMAN WASHINGTON DC               | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 107,520.                                                             | 0.                                                                        | 17,203.                                                                                       |
| (30) PAM TORELL<br>FORMER SECRETARY/TREASURER                  | 37.00<br>3.00                                                                              |                                                                                                              |                       |         |              |                              | X      | 106,473.                                                             | 0.                                                                        | 17,035.                                                                                       |
| (31) EARLE ATTLEE<br>FORMER VICE CHAIRMAN PHOENIX              | 16.00<br>0.                                                                                |                                                                                                              |                       |         |              |                              | X      | 104,749.                                                             | 0.                                                                        | 16,760.                                                                                       |
| (32) PAUL JANKA<br>VICE CHAIRMAN LOS ANGELES                   | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 99,211.                                                              | 0.                                                                        | 15,874.                                                                                       |
| (33) ERIC FERGUSON<br>PRESIDENT                                | 39.00<br>1.00                                                                              | X                                                                                                            |                       | X       |              |                              |        | 97,642.                                                              | 0.                                                                        | 15,623.                                                                                       |
| (34) CASEY GRANGER<br>VICE CHAIRMAN CHARLOTTE                  | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 86,393.                                                              | 0.                                                                        | 13,823.                                                                                       |
| (35) CURTIS DETZER<br>VICE CHAIRMAN BOSTON                     | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 78,922.                                                              | 0.                                                                        | 12,627.                                                                                       |
| (36) TIM DAUDELIN<br>CHAIRMAN CHICAGO                          | 16.00<br>0.                                                                                | X                                                                                                            |                       | X       |              |                              |        | 77,655.                                                              | 0.                                                                        | 12,425.                                                                                       |
| <b>1b Sub-total</b>                                            |                                                                                            |                                                                                                              |                       |         |              |                              |        | 1,113,610.                                                           | 0.                                                                        | 180,160.                                                                                      |
| <b>c Total from continuation sheets to Part VII, Section A</b> |                                                                                            |                                                                                                              |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
| <b>d Total (add lines 1b and 1c)</b>                           |                                                                                            |                                                                                                              |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **31**

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

**Section B. Independent Contractors**

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

| (A)<br>Name and business address | (B)<br>Description of services | (C)<br>Compensation |
|----------------------------------|--------------------------------|---------------------|
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |

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

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

| (A)<br>Name and title                                          | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|----------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                |                                                                                            | Individual trustee or director                                                                            | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| (37) ROBERT BAKER<br>CHAIRMAN DALLAS                           | 16.00<br>0.                                                                                | X                                                                                                         |                       | X       |              |                              |        | 75,507.                                                              | 0.                                                                        | 12,081.                                                                                       |
| (38) PAT CLARK<br>SECRETARY/TREASURER                          | 37.00<br>3.00                                                                              |                                                                                                           |                       | X       |              |                              |        | 74,465.                                                              | 0.                                                                        | 11,914.                                                                                       |
| (39) PATRICK O'ROURKE<br>VICE PRESIDENT                        | 40.00<br>0.                                                                                |                                                                                                           |                       | X       |              |                              |        | 64,298.                                                              | 0.                                                                        | 10,288.                                                                                       |
| (40) SCOTT ABBOTT<br>FORMER CHAIRMAN CHICAGO                   | 16.00<br>0.                                                                                |                                                                                                           |                       |         |              |                              | X      | 63,310.                                                              | 0.                                                                        | 10,130.                                                                                       |
| (41) JOSEPH COLLINS<br>CHAIRMAN WASHINGTON DC                  | 16.00<br>0.                                                                                | X                                                                                                         |                       | X       |              |                              |        | 63,193.                                                              | 0.                                                                        | 10,111.                                                                                       |
| (42) MARK PERCY<br>FORMER VICE CHAIRMAN BOSTON                 | 16.00<br>0.                                                                                |                                                                                                           |                       |         |              |                              | X      | 30,050.                                                              | 0.                                                                        | 4,808.                                                                                        |
| (43) KEVIN WILKES<br>VICE CHAIRMAN PHILADELPHIA                | 16.00<br>0.                                                                                | X                                                                                                         |                       | X       |              |                              |        | 23,152.                                                              | 0.                                                                        | 3,704.                                                                                        |
| (44) DAVID DUNCAN<br>CHAIRMAN PHOENIX                          | 16.00<br>0.                                                                                | X                                                                                                         |                       | X       |              |                              |        | 14,148.                                                              | 0.                                                                        | 2,264.                                                                                        |
| (45) BRIAN ELLIS<br>VICE CHAIRMAN PHOENIX                      | 16.00<br>0.                                                                                | X                                                                                                         |                       | X       |              |                              |        | 8,371.                                                               | 0.                                                                        | 1,339.                                                                                        |
|                                                                |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
|                                                                |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
| <b>1b Sub-total</b>                                            |                                                                                            |                                                                                                           |                       |         |              |                              |        | 416,494.                                                             | 0.                                                                        | 66,639.                                                                                       |
| <b>c Total from continuation sheets to Part VII, Section A</b> |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |
| <b>d Total (add lines 1b and 1c)</b>                           |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                      |                                                                           |                                                                                               |

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **31**

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

**Section B. Independent Contractors**

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

| (A)<br>Name and business address                                                                                                                                          | (B)<br>Description of services | (C)<br>Compensation |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|---------------------|
|                                                                                                                                                                           |                                |                     |
|                                                                                                                                                                           |                                |                     |
|                                                                                                                                                                           |                                |                     |
|                                                                                                                                                                           |                                |                     |
|                                                                                                                                                                           |                                |                     |
| <b>2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization</b> |                                |                     |

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

|                                                                   |                                                                    |                                                                                                                                            |                | (A)<br>Total revenue | (B)<br>Related or exempt<br>function revenue | (C)<br>Unrelated<br>business revenue | (D)<br>Revenue excluded<br>from tax under<br>sections 512-514 |
|-------------------------------------------------------------------|--------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|----------------|----------------------|----------------------------------------------|--------------------------------------|---------------------------------------------------------------|
| <b>Contributions, Gifts, Grants<br/>and Other Similar Amounts</b> | 1a                                                                 | Federated campaigns . . . . .                                                                                                              | 1a             |                      |                                              |                                      |                                                               |
|                                                                   | b                                                                  | Membership dues . . . . .                                                                                                                  | 1b             | 47,475,171           |                                              |                                      |                                                               |
|                                                                   | c                                                                  | Fundraising events . . . . .                                                                                                               | 1c             |                      |                                              |                                      |                                                               |
|                                                                   | d                                                                  | Related organizations . . . . .                                                                                                            | 1d             |                      |                                              |                                      |                                                               |
|                                                                   | e                                                                  | Government grants (contributions) . . . . .                                                                                                | 1e             |                      |                                              |                                      |                                                               |
|                                                                   | f                                                                  | All other contributions, gifts, grants,<br>and similar amounts not included above . . . . .                                                | 1f             |                      |                                              |                                      |                                                               |
|                                                                   | g                                                                  | Noncash contributions included in<br>lines 1a-1f. . . . .                                                                                  | 1g             | \$                   |                                              |                                      |                                                               |
|                                                                   | h                                                                  | <b>Total.</b> Add lines 1a-1f . . . . .                                                                                                    |                | 47,475,171           |                                              |                                      |                                                               |
| <b>Program Service<br/>Revenue</b>                                |                                                                    |                                                                                                                                            |                | Business Code        |                                              |                                      |                                                               |
|                                                                   | 2a                                                                 | FPL RECOVERY                                                                                                                               | 900099         | 9,044,918            | 9,044,918                                    |                                      |                                                               |
|                                                                   | b                                                                  | EXHIBITOR REVENUE                                                                                                                          | 900099         | 30,000               | 30,000                                       |                                      |                                                               |
|                                                                   | c                                                                  | EXPENSE RECOVERY INCOME                                                                                                                    | 900099         | 89,007               | 89,007                                       |                                      |                                                               |
|                                                                   | d                                                                  |                                                                                                                                            |                |                      |                                              |                                      |                                                               |
|                                                                   | e                                                                  |                                                                                                                                            |                |                      |                                              |                                      |                                                               |
|                                                                   | f                                                                  | All other program service revenue . . . . .                                                                                                |                |                      |                                              |                                      |                                                               |
|                                                                   | g                                                                  | <b>Total.</b> Add lines 2a-2f . . . . .                                                                                                    |                | 9,163,925            |                                              |                                      |                                                               |
| <b>Other Revenue</b>                                              | 3                                                                  | Investment income (including dividends, interest, and<br>other similar amounts). . . . .                                                   |                | 1,197,129            |                                              |                                      | 1,197,129                                                     |
|                                                                   | 4                                                                  | Income from investment of tax-exempt bond proceeds . . . . .                                                                               |                | 0                    |                                              |                                      |                                                               |
|                                                                   | 5                                                                  | Royalties . . . . .                                                                                                                        |                | 0                    |                                              |                                      |                                                               |
|                                                                   |                                                                    |                                                                                                                                            | (i) Real       | (ii) Personal        |                                              |                                      |                                                               |
|                                                                   | 6a                                                                 | Gross rents . . . . .                                                                                                                      | 6a             |                      |                                              |                                      |                                                               |
|                                                                   | b                                                                  | Less rental expenses                                                                                                                       | 6b             |                      |                                              |                                      |                                                               |
|                                                                   | c                                                                  | Rental income or (loss)                                                                                                                    | 6c             |                      |                                              |                                      |                                                               |
|                                                                   | d                                                                  | Net rental income or (loss). . . . .                                                                                                       |                | 0                    |                                              |                                      |                                                               |
|                                                                   | 7a                                                                 | Gross amount from<br>sales of assets<br>other than inventory                                                                               | (i) Securities | (ii) Other           |                                              |                                      |                                                               |
|                                                                   |                                                                    | 7a                                                                                                                                         | 26,970,891     |                      |                                              |                                      |                                                               |
|                                                                   | b                                                                  | Less cost or other basis<br>and sales expenses . . . . .                                                                                   | 7b             | 25,431,666           |                                              |                                      |                                                               |
|                                                                   | c                                                                  | Gain or (loss) . . . . .                                                                                                                   | 7c             | 1,539,225            |                                              |                                      |                                                               |
|                                                                   | d                                                                  | Net gain or (loss) . . . . .                                                                                                               |                | 1,539,225            |                                              |                                      | 1,539,225                                                     |
|                                                                   | 8a                                                                 | Gross income from fundraising<br>events (not including \$ _____<br>of contributions reported on line<br>1c) See Part IV, line 18 . . . . . | 8a             | 0                    |                                              |                                      |                                                               |
|                                                                   | b                                                                  | Less direct expenses . . . . .                                                                                                             | 8b             | 0                    |                                              |                                      |                                                               |
|                                                                   | c                                                                  | Net income or (loss) from fundraising events. . . . .                                                                                      |                | 0                    |                                              |                                      |                                                               |
|                                                                   | 9a                                                                 | Gross income from gaming<br>activities See Part IV, line 19 . . . . .                                                                      | 9a             | 0                    |                                              |                                      |                                                               |
|                                                                   | b                                                                  | Less direct expenses . . . . .                                                                                                             | 9b             | 0                    |                                              |                                      |                                                               |
| c                                                                 | Net income or (loss) from gaming activities. . . . .               |                                                                                                                                            | 0              |                      |                                              |                                      |                                                               |
| 10a                                                               | Gross sales of inventory, less<br>returns and allowances . . . . . | 10a                                                                                                                                        | 0              |                      |                                              |                                      |                                                               |
| b                                                                 | Less cost of goods sold . . . . .                                  | 10b                                                                                                                                        | 0              |                      |                                              |                                      |                                                               |
| c                                                                 | Net income or (loss) from sales of inventory. . . . .              |                                                                                                                                            | 0              |                      |                                              |                                      |                                                               |
| <b>Miscellaneous<br/>Revenue</b>                                  |                                                                    |                                                                                                                                            |                | Business Code        |                                              |                                      |                                                               |
|                                                                   | 11a                                                                | OTHER INCOME                                                                                                                               | 900099         | 607,682              |                                              |                                      | 607,682                                                       |
|                                                                   | b                                                                  |                                                                                                                                            |                |                      |                                              |                                      |                                                               |
|                                                                   | c                                                                  |                                                                                                                                            |                |                      |                                              |                                      |                                                               |
|                                                                   | d                                                                  | All other revenue . . . . .                                                                                                                |                |                      |                                              |                                      |                                                               |
| e                                                                 | <b>Total.</b> Add lines 11a-11d . . . . .                          |                                                                                                                                            | 607,682        |                      |                                              |                                      |                                                               |
| 12                                                                | <b>Total revenue.</b> See instructions . . . . .                   |                                                                                                                                            | 59,983,132     | 9,163,925            |                                              | 3,344,036                            |                                                               |

**Part IX Statement of Functional Expenses**

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

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

|                                                                                                                                                                                                                                                     | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| 1 Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21 . . . . .                                                                                                                                     | 61,000.               |                                 |                                        |                             |
| 2 Grants and other assistance to domestic individuals See Part IV, line 22 . . . . .                                                                                                                                                                | 0.                    |                                 |                                        |                             |
| 3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, lines 15 and 16 . . . . .                                                                                                         | 0.                    |                                 |                                        |                             |
| 4 Benefits paid to or for members . . . . .                                                                                                                                                                                                         | 0.                    |                                 |                                        |                             |
| 5 Compensation of current officers, directors, trustees, and key employees . . . . .                                                                                                                                                                | 3,719,469.            |                                 |                                        |                             |
| 6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .                                                                                            | 0.                    |                                 |                                        |                             |
| 7 Other salaries and wages . . . . .                                                                                                                                                                                                                | 30,493,355.           |                                 |                                        |                             |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)                                                                                                                                                | 3,599,935.            |                                 |                                        |                             |
| 9 Other employee benefits . . . . .                                                                                                                                                                                                                 | 3,044,780.            |                                 |                                        |                             |
| 10 Payroll taxes . . . . .                                                                                                                                                                                                                          | 859,558.              |                                 |                                        |                             |
| 11 Fees for services (nonemployees)                                                                                                                                                                                                                 | 0.                    |                                 |                                        |                             |
| a Management . . . . .                                                                                                                                                                                                                              | 2,268,635.            |                                 |                                        |                             |
| b Legal . . . . .                                                                                                                                                                                                                                   | 70,542.               |                                 |                                        |                             |
| c Accounting . . . . .                                                                                                                                                                                                                              | 0.                    |                                 |                                        |                             |
| d Lobbying . . . . .                                                                                                                                                                                                                                | 0.                    |                                 |                                        |                             |
| e Professional fundraising services See Part IV, line 17.                                                                                                                                                                                           | 103,524.              |                                 |                                        |                             |
| f Investment management fees . . . . .                                                                                                                                                                                                              | 2,593,713.            |                                 |                                        |                             |
| g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O) . . . . .                                                                                                                              | 0.                    |                                 |                                        |                             |
| 12 Advertising and promotion . . . . .                                                                                                                                                                                                              | 241,691.              |                                 |                                        |                             |
| 13 Office expenses . . . . .                                                                                                                                                                                                                        | 373,383.              |                                 |                                        |                             |
| 14 Information technology . . . . .                                                                                                                                                                                                                 | 0.                    |                                 |                                        |                             |
| 15 Royalties . . . . .                                                                                                                                                                                                                              | 2,344,119.            |                                 |                                        |                             |
| 16 Occupancy . . . . .                                                                                                                                                                                                                              | 0.                    |                                 |                                        |                             |
| 17 Travel . . . . .                                                                                                                                                                                                                                 | 0.                    |                                 |                                        |                             |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials                                                                                                                                                   | 0.                    |                                 |                                        |                             |
| 19 Conferences, conventions, and meetings . . . . .                                                                                                                                                                                                 | 33,542.               |                                 |                                        |                             |
| 20 Interest . . . . .                                                                                                                                                                                                                               | 0.                    |                                 |                                        |                             |
| 21 Payments to affiliates . . . . .                                                                                                                                                                                                                 | 0.                    |                                 |                                        |                             |
| 22 Depreciation, depletion, and amortization . . . . .                                                                                                                                                                                              | 1,446,799.            |                                 |                                        |                             |
| 23 Insurance . . . . .                                                                                                                                                                                                                              | 0.                    |                                 |                                        |                             |
| 24 Other expenses Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)                                                  |                       |                                 |                                        |                             |
| a OTHER ADMIN SUPPORT                                                                                                                                                                                                                               | 1,754,902.            |                                 |                                        |                             |
| b OUTSIDE SERVICES                                                                                                                                                                                                                                  | 575,335.              |                                 |                                        |                             |
| c                                                                                                                                                                                                                                                   |                       |                                 |                                        |                             |
| d                                                                                                                                                                                                                                                   |                       |                                 |                                        |                             |
| e All other expenses                                                                                                                                                                                                                                |                       |                                 |                                        |                             |
| 25 Total functional expenses Add lines 1 through 24e                                                                                                                                                                                                | 53,584,282.           |                                 |                                        |                             |
| 26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . . | 0.                    |                                 |                                        |                             |

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

|                                                                               |                                                                                                                                                                                                                             | (A)<br>Beginning of year |             | (B)<br>End of year |
|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|-------------|--------------------|
| <b>Assets</b>                                                                 | 1 Cash - non-interest-bearing . . . . .                                                                                                                                                                                     | 0.                       | 1           | 0.                 |
|                                                                               | 2 Savings and temporary cash investments. . . . .                                                                                                                                                                           | 10,931,082.              | 2           | 7,596,383.         |
|                                                                               | 3 Pledges and grants receivable, net . . . . .                                                                                                                                                                              | 0.                       | 3           | 0.                 |
|                                                                               | 4 Accounts receivable, net. . . . .                                                                                                                                                                                         | 0.                       | 4           | 0.                 |
|                                                                               | 5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . . | 0.                       | 5           | 0.                 |
|                                                                               | 6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B). . . . .                                                                | 0.                       | 6           | 0.                 |
|                                                                               | 7 Notes and loans receivable, net . . . . .                                                                                                                                                                                 | 41,870.                  | 7           | 28,280.            |
|                                                                               | 8 Inventories for sale or use . . . . .                                                                                                                                                                                     | 0.                       | 8           | 0.                 |
|                                                                               | 9 Prepaid expenses and deferred charges . . . . .                                                                                                                                                                           | 0.                       | 9           | 0.                 |
|                                                                               | 10a Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D . . . . .                                                                                                                             | 10a 18,307,247.          |             |                    |
|                                                                               | b Less accumulated depreciation. . . . .                                                                                                                                                                                    | 10b 11,978,403.          |             |                    |
|                                                                               | 11 Investments - publicly traded securities. . . . .                                                                                                                                                                        | 43,296,776.              | 11          | 51,016,874.        |
|                                                                               | 12 Investments - other securities See Part IV, line 11. . . . .                                                                                                                                                             | 4,846,731.               | 12          | 5,442,289.         |
|                                                                               | 13 Investments - program-related See Part IV, line 11. . . . .                                                                                                                                                              | 0.                       | 13          | 0.                 |
|                                                                               | 14 Intangible assets . . . . .                                                                                                                                                                                              | 0.                       | 14          | 0.                 |
|                                                                               | 15 Other assets See Part IV, line 11 . . . . .                                                                                                                                                                              | 4,255,599.               | 15          | 4,700,345.         |
| 16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) . . . . . | 68,440,633.                                                                                                                                                                                                                 | 16                       | 75,113,015. |                    |
| <b>Liabilities</b>                                                            | 17 Accounts payable and accrued expenses. . . . .                                                                                                                                                                           | 5,652,411.               | 17          | 4,363,801.         |
|                                                                               | 18 Grants payable . . . . .                                                                                                                                                                                                 | 0.                       | 18          | 0.                 |
|                                                                               | 19 Deferred revenue. . . . .                                                                                                                                                                                                | 8,773,652.               | 19          | 12,146,589.        |
|                                                                               | 20 Tax-exempt bond liabilities. . . . .                                                                                                                                                                                     | 0.                       | 20          | 0.                 |
|                                                                               | 21 Escrow or custodial account liability Complete Part IV of Schedule D. . . . .                                                                                                                                            | 0.                       | 21          | 0.                 |
|                                                                               | 22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . .     | 0.                       | 22          | 0.                 |
|                                                                               | 23 Secured mortgages and notes payable to unrelated third parties . . . . .                                                                                                                                                 | 0.                       | 23          | 0.                 |
|                                                                               | 24 Unsecured notes and loans payable to unrelated third parties. . . . .                                                                                                                                                    | 0.                       | 24          | 0.                 |
|                                                                               | 25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D . . . . .                                           | 2,151,040.               | 25          | 3,644,447.         |
|                                                                               | 26 <b>Total liabilities.</b> Add lines 17 through 25. . . . .                                                                                                                                                               | 16,577,103.              | 26          | 20,154,837.        |
| <b>Net Assets or Fund Balances</b>                                            | Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.                                                                                               |                          |             |                    |
|                                                                               | 27 Net assets without donor restrictions. . . . .                                                                                                                                                                           | 51,856,321.              | 27          | 55,007,506.        |
|                                                                               | 28 Net assets with donor restrictions. . . . .                                                                                                                                                                              | 7,209.                   | 28          | -49,328.           |
|                                                                               | Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.                                                                                                        |                          |             |                    |
|                                                                               | 29 Capital stock or trust principal, or current funds . . . . .                                                                                                                                                             |                          | 29          |                    |
|                                                                               | 30 Paid-in or capital surplus, or land, building, or equipment fund. . . . .                                                                                                                                                |                          | 30          |                    |
|                                                                               | 31 Retained earnings, endowment, accumulated income, or other funds. . . . .                                                                                                                                                |                          | 31          |                    |
|                                                                               | 32 <b>Total net assets or fund balances</b> . . . . .                                                                                                                                                                       | 51,863,530.              | 32          | 54,958,178.        |
| 33 <b>Total liabilities and net assets/fund balances.</b> . . . . .           | 68,440,633.                                                                                                                                                                                                                 | 33                       | 75,113,015. |                    |

Form **990** (2019)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☒

|           |                                                                                                                         |           |             |
|-----------|-------------------------------------------------------------------------------------------------------------------------|-----------|-------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12) . . . . .                                                     | <b>1</b>  | 59,983,132. |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25) . . . . .                                                      | <b>2</b>  | 53,584,282. |
| <b>3</b>  | Revenue less expenses Subtract line 2 from line 1 . . . . .                                                             | <b>3</b>  | 6,398,850.  |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) . . . . .                     | <b>4</b>  | 51,863,530. |
| <b>5</b>  | Net unrealized gains (losses) on investments . . . . .                                                                  | <b>5</b>  | -2,265,948. |
| <b>6</b>  | Donated services and use of facilities . . . . .                                                                        | <b>6</b>  | 0.          |
| <b>7</b>  | Investment expenses . . . . .                                                                                           | <b>7</b>  | 0.          |
| <b>8</b>  | Prior period adjustments . . . . .                                                                                      | <b>8</b>  | 0.          |
| <b>9</b>  | Other changes in net assets or fund balances (explain on Schedule O). . . . .                                           | <b>9</b>  | -1,038,254. |
| <b>10</b> | Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 32, column (B)) . . . . . | <b>10</b> | 54,958,178. |

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII. ☐

|                                                                                                                                                                                                                                                                                                                                                                                                                                              | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1</b> Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O                                                                                                                                                   |     |    |
| <b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .<br>If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |     | X  |
| <b>b</b> Were the organization's financial statements audited by an independent accountant? . . . . .<br>If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both<br><input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                 | X   |    |
| <b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . . .<br>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O                                                                        | X   |    |
| <b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .                                                                                                                                                                                                                                                                 |     | X  |
| <b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits . . .                                                                                                                                                                                                          |     |    |

Form **990** (2019)

**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

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

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No 1545-0047

**2019**

**Open to Public  
Inspection**

Name of the organization **ALLIED PILOTS ASSOCIATION**  
% **HANK COFIELD**

Employer identification number  
**13-1982245**

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

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

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

**Part II Conservation Easements.**

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

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

|                                                                                                     |                                                                             |
|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| <input type="checkbox"/> Preservation of land for public use (for example, recreation or education) | <input type="checkbox"/> Preservation of a historically important land area |
| <input type="checkbox"/> Protection of natural habitat                                              | <input type="checkbox"/> Preservation of a certified historic structure     |
| <input type="checkbox"/> Preservation of open space                                                 |                                                                             |

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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Schedule D (Form 990) 2019

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

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

**Part IV Escrow and Custodial Arrangements.**

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

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

**Part V Endowment Funds.**

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

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

**Part VI Land, Buildings, and Equipment.**

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

- | Description of property                                                                                        | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|----------------------------------------------------------------------------------------------------------------|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land . . . . .                                                                                              |                                      |                                 |                              |                |
| b Buildings . . . . .                                                                                          |                                      |                                 |                              |                |
| c Leasehold improvements . . . . .                                                                             |                                      | 1,030,910.                      | 336,707.                     | 694,203.       |
| d Equipment . . . . .                                                                                          |                                      | 15,861,807.                     | 11,641,696.                  | 4,220,111.     |
| e Other . . . . .                                                                                              |                                      | 1,414,530.                      |                              | 1,414,530.     |
| <b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10c) . . . . . |                                      |                                 |                              | 6,328,844.     |

Schedule D (Form 990) 2019

**Part VII Investments - Other Securities.**

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

| (a) Description of security or category<br>(including name of security)           | (b) Book value | (c) Method of valuation<br>Cost or end-of-year market value |
|-----------------------------------------------------------------------------------|----------------|-------------------------------------------------------------|
| (1) Financial derivatives . . . . .                                               |                |                                                             |
| (2) Closely held equity interests . . . . .                                       |                |                                                             |
| (3) Other                                                                         |                |                                                             |
| (A) APA HOLDING CORPORATION                                                       | 5,442,289.     | FMV                                                         |
| (B)                                                                               |                |                                                             |
| (C)                                                                               |                |                                                             |
| (D)                                                                               |                |                                                             |
| (E)                                                                               |                |                                                             |
| (F)                                                                               |                |                                                             |
| (G)                                                                               |                |                                                             |
| (H)                                                                               |                |                                                             |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 12) . . . . . | 5,442,289.     |                                                             |

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

| (a) Description                                                                   | (b) Book value |
|-----------------------------------------------------------------------------------|----------------|
| (1) ACCRUED INTEREST RECEIVABLE                                                   | 186,714.       |
| (2) DUES RECEIVABLE                                                               | 3,510,742.     |
| (3) AAL REIMBURSEMENT RECEIVABLE                                                  | 3,590.         |
| (4) FLIGHT PAY LOSS RECEIVABLE                                                    | 167,038.       |
| (5) OTHER ASSETS                                                                  | 832,261.       |
| (6)                                                                               |                |
| (7)                                                                               |                |
| (8)                                                                               |                |
| (9)                                                                               |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 15) . . . . . | 4,700,345.     |

**Part X Other Liabilities.**

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

| 1. (a) Description of liability                                                   | (b) Book value |
|-----------------------------------------------------------------------------------|----------------|
| (1) Federal income taxes                                                          |                |
| (2) FURLOUGHED PILOT LOAN FUND                                                    |                |
| (3) RETIREMENT CONTRIBUTION PAYABL                                                | 75,253.        |
| (4) POST RETIREMENT BENEFITS PAYAB                                                | 3,569,194.     |
| (5)                                                                               |                |
| (6)                                                                               |                |
| (7)                                                                               |                |
| (8)                                                                               |                |
| (9)                                                                               |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 25) . . . . . | 3,644,447.     |

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

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

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

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

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

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

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

**Part XIII Supplemental Information.**

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

SEE PAGE 5

**Part XIII** Supplemental Information (continued)

SCH D, PART X, LINE 2

ASC 740 FOOTNOTE:

THE FINANCIAL ACCOUNTING STANDARDS BOARD (FASB) ACCOUNTING STANDARDS  
CODIFICATION TOPIC 740, INCOME TAXES (ASC 740), PRESCRIBES A RECOGNITION  
THRESHOLD AND MEASUREMENT REQUIREMENTS FOR FINANCIAL STATEMENT  
RECOGNITION AND MEASUREMENT OF A TAX POSITION TAKEN OR EXPECTED TO BE  
TAKEN IN A TAX RETURN. IN ADDITION, ASC 740 PROVIDES GUIDANCE ON  
RECOGNITION, CLASSIFICATION, ACCOUNTING IN INTERIM PERIODS AND DISCLOSURE  
REQUIREMENTS FOR UNCERTAIN TAX PROVISIONS. APA AND ITS SUBSIDIARIES HAVE  
NO FINANCIAL REPORTING REQUIREMENTS PURSUANT TO ASC 740 IN FISCAL YEAR  
2020 AND 2019.

**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

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

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

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2019**

**Open to Public  
Inspection**

Name of the organization **ALLIED PILOTS ASSOCIATION**

§ **HANK COFIELD**

Employer identification number

**13-1982245**

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

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

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

| 1 (a) Name and address of organization or government                                   | (b) EIN    | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
|----------------------------------------------------------------------------------------|------------|---------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|---------------------------------------|------------------------------------|
| (1) APA EMERGENCY RELIEF AND SCHOLARSHIP FUND<br>14600 TRINITY BLVD FT WORTH, TX 76155 | 81-4427466 | 501 (C) (3)                     | 61,000.                  |                                   | FMV                                                   |                                       | SCHOLARSHIPS RECIPIE               |
| (2)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (3)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (4)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (5)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (6)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (7)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (8)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (9)                                                                                    |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (10)                                                                                   |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (11)                                                                                   |            |                                 |                          |                                   |                                                       |                                       |                                    |
| (12)                                                                                   |            |                                 |                          |                                   |                                                       |                                       |                                    |

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

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Schedule I (Form 990) (2019)

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

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

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

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

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

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No 1545-0047

**2019**

**Open to Public  
Inspection**

Name of the organization **ALLIED PILOTS ASSOCIATION**  
% **HANK COFIELD**

Employer identification number  
**13-1982245**

**Part I Questions Regarding Compensation**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

|    | Yes | No |
|----|-----|----|
| 1a |     |    |
| 1b | X   |    |
| 2  | X   |    |
| 3  |     |    |
| 4a |     | X  |
| 4b |     | X  |
| 4c |     | X  |
| 5a |     |    |
| 5b |     |    |
| 6a |     |    |
| 6b |     |    |
| 7  |     |    |
| 8  |     |    |
| 9  |     |    |

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Schedule J (Form 990) 2019

Schedule J (Form 990) 2019

Page **2****Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed

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

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

| (A) Name and Title                                |      | (B) Breakdown of W-2 and/or 1099-MISC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|---------------------------------------------------|------|----------------------------------------------------|-------------------------------------|-------------------------------------|------------------------------------------------|-------------------------|---------------------------------|-----------------------------------------------------------------------|
|                                                   |      | (i) Base compensation                              | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |                                                |                         |                                 |                                                                       |
| 1 DANIEL CAREY<br>FORMER PRESIDENT                | (i)  | 134,989.                                           | 0.                                  | 0.                                  | 21,598.                                        |                         | 156,587.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 2 PAM TORELL<br>FORMER SECRETARY/TREASURER        | (i)  | 106,473.                                           | 0.                                  | 0.                                  | 17,035.                                        |                         | 123,508.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 3 SCOTT ABBOTT<br>FORMER CHAIRMAN CHICAGO         | (i)  | 63,310.                                            | 0.                                  | 0.                                  | 10,130.                                        |                         | 73,440.                         |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 4 BILLY RAY READ<br>CHAIRMAN MIAMI                | (i)  | 145,628.                                           | 0.                                  | 0.                                  | 23,300.                                        |                         | 168,928.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 5 DAVID RINTEL<br>VICE CHAIRMAN MIAMI             | (i)  | 138,816.                                           | 0.                                  | 0.                                  | 22,211.                                        |                         | 161,027.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 6 JM JOSEY WALES<br>VICE CHAIRMAN DALLAS          | (i)  | 163,603.                                           | 0.                                  | 0.                                  | 26,177.                                        |                         | 189,780.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 7 DON IORIO<br>CHAIRMAN CHARLOTTE                 | (i)  | 167,004.                                           | 0.                                  | 0.                                  | 26,721.                                        |                         | 193,725.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 8 SCOTT HECKENBERGER<br>VICE CHAIRMAN NEW YORK    | (i)  | 185,049.                                           | 0.                                  | 0.                                  | 29,608.                                        |                         | 214,657.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 9 PAUL DIORIO<br>CHAIRMAN PHILADELPHIA            | (i)  | 143,067.                                           | 0.                                  | 0.                                  | 22,891.                                        |                         | 165,958.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 10 PAUL MUSIC<br>FORMER VICE CHAIRMAN PHL         | (i)  | 150,885.                                           | 0.                                  | 0.                                  | 24,142.                                        |                         | 175,027.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 11 MARK BURDICK<br>FORMER CHAIRMAN PHOENIX        | (i)  | 165,230.                                           | 0.                                  | 0.                                  | 26,437.                                        |                         | 191,667.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 12 EARLE ATTLEE<br>FORMER VICE CHAIRMAN PHOENIX   | (i)  | 104,749.                                           | 0.                                  | 0.                                  | 16,760.                                        |                         | 121,509.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 13 ANDREA DUFF<br>EXECUTIVE DIRECTOR              | (i)  | 229,800.                                           | 0.                                  | 0.                                  | 10,400.                                        | 31,673.                 | 271,873.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 14 HENRY COFIELD<br>DIRECTOR-FINANCE & ACCOUNTING | (i)  | 200,058.                                           | 0.                                  | 0.                                  | 10,003.                                        | 15,836.                 | 225,897.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 15 JOSE LOPEZ<br>DIRECTOR OF IT                   | (i)  | 157,038.                                           | 0.                                  | 0.                                  | 5,539.                                         | 38,600.                 | 201,177.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 16 RAY DUKE<br>DIRECTOR-SAFETY & TRAINING         | (i)  | 231,093.                                           | 0.                                  | 0.                                  | 11,555.                                        | 38,600.                 | 281,248.                        |                                                                       |
|                                                   | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |

Schedule J (Form 990) 2019

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Schedule J (Form 990) 2019

Page **2****Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed

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

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

| (A) Name and Title                                      |      | (B) Breakdown of W-2 and/or 1099-MISC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|---------------------------------------------------------|------|----------------------------------------------------|-------------------------------------|-------------------------------------|------------------------------------------------|-------------------------|---------------------------------|-----------------------------------------------------------------------|
|                                                         |      | (i) Base compensation                              | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |                                                |                         |                                 |                                                                       |
| 1 JONATHAN ELIFSON<br>DIRECTOR-LEGAL AFFAIRS            | (i)  | 166,667.                                           | 0.                                  | 0.                                  | 8,333.                                         | 180.                    | 175,180.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 2 TRICIA KENNEDY<br>DIRECTOR-DISPUTES RESOLUTION        | (i)  | 216,484.                                           | 0.                                  | 0.                                  | 10,824.                                        | 15,836.                 | 243,144.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 3 MARCY SCOTT<br>DIRECTOR-BENEFITS                      | (i)  | 163,648.                                           | 0.                                  | 0.                                  | 8,182.                                         | 13,120.                 | 184,950.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 4 MARK MYERS<br>DIRECTOR-PILOT NEGOTIATIONS             | (i)  | 222,372.                                           | 0.                                  | 0.                                  | 11,119.                                        | 38,600.                 | 272,091.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 5 GREGG OVERMAN<br>DIRECTOR-COMMUNICATIONS              | (i)  | 224,782.                                           | 0.                                  | 0.                                  | 11,239.                                        | 38,600.                 | 274,621.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 6 WELDON RATLIFF<br>APPLICATION DEVELOP MANAGER         | (i)  | 136,709.                                           | 0.                                  | 0.                                  | 6,835.                                         | 38,600.                 | 182,144.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 7 RUSSELL THOMPSON<br>LEAD APPLICATION DEVELOPER        | (i)  | 136,789.                                           | 0.                                  | 0.                                  | 6,840.                                         | 15,770.                 | 159,399.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 8 MARK PERCY<br>FORMER VICE CHAIRMAN BOSTON             | (i)  | 30,050.                                            | 0.                                  | 0.                                  | 4,808.                                         |                         | 34,858.                         |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 9 CHRISTINA PAPADOPOULOS<br>PILOT NEGOTIATIONS ATTORNEY | (i)  | 136,178.                                           | 0.                                  | 0.                                  | 6,676.                                         | 15,836.                 | 158,690.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 10 JIM CLARK<br>SR DIRECTOR OF LEGAL AFFAIRS            | (i)  | 495,213.                                           | 0.                                  | 0.                                  |                                                |                         | 495,213.                        |                                                                       |
|                                                         | (ii) | 0.                                                 | 0.                                  | 0.                                  |                                                |                         |                                 |                                                                       |
| 11                                                      | (i)  |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
| 12                                                      | (i)  |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
| 13                                                      | (i)  |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
| 14                                                      | (i)  |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
| 15                                                      | (i)  |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
| 16                                                      | (i)  |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                       |

Schedule J (Form 990) 2019

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**Part III Supplemental Information**

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

SCH J, PART I, LINE 1A

TRAVEL FOR COMPANIONS IS PROVIDED TO OFFICERS, DIRECTORS, AND KEY EMPLOYEES ON A LIMITED BASIS. THESE INDIVIDUALS ARE PROVIDED ONE ROUND-TRIP AIRFARE PER YEAR FOR A COMPANION. THIS ITEM DOES NOT REPRESENT TAXABLE COMPENSATION TO THESE INDIVIDUALS. FOR 2019, THE FOLLOWING RECEIVED THIS BENEFIT: JONATHAN ELIFSON AND JOSE LOPEZ. WITH RESPECT TO DOMICILE OFFICERS LISTED IN PART VII, SUCH OFFICERS ARE PROVIDED WITH DISCRETIONARY FUNDS. HOWEVER, ALL EXPENDITURES MUST BE FOR BUSINESS USE. HOUSING ALLOWANCE OR RESIDENCE FOR PERSONAL USE AND PERSONAL SERVICES (CLEANING SERVICES) WERE PROVIDED TO TWO OFFICERS. THE HOUSING AND CLEANING SERVICES WERE PROVIDED BECAUSE THE INDIVIDUALS ARE NATIONAL OFFICERS AND MUST BE ON-SITE AT APA'S NATIONAL HEADQUARTERS. HOWEVER, THEY ARE NOT LOCAL RESIDENTS. THESE ITEMS DO NOT REPRESENT TAXABLE COMPENSATION TO THESE INDIVIDUALS: DANIEL CAREY AND TIM HAMEL.

Schedule J (Form 990) 2019

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

Department of the Treasury  
Internal Revenue Service

**Transactions With Interested Persons**

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

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No 1545-0047

**2019**

Open To Public  
Inspection

Name of the organization  
% HANK COFIELD ALLIED PILOTS ASSOCIATION

Employer identification number  
13-1982245

**Part I Excess Benefit Transactions** (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only)  
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

| 1   | (a) Name of disqualified person | (b) Relationship between disqualified person and organization | (c) Description of transaction | (d) Corrected? |    |
|-----|---------------------------------|---------------------------------------------------------------|--------------------------------|----------------|----|
|     |                                 |                                                               |                                | Yes            | No |
| (1) |                                 |                                                               |                                |                |    |
| (2) |                                 |                                                               |                                |                |    |
| (3) |                                 |                                                               |                                |                |    |
| (4) |                                 |                                                               |                                |                |    |
| (5) |                                 |                                                               |                                |                |    |
| (6) |                                 |                                                               |                                |                |    |

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958 . . . . . ▶ \$ \_\_\_\_\_

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization. . . . . ▶ \$ \_\_\_\_\_

**Part II Loans to and/or From Interested Persons.**  
Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26, or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

| (a) Name of interested person | (b) Relationship with organization | (c) Purpose of loan | (d) Loan to or from the organization? |      | (e) Original principal amount | (f) Balance due | (g) In default? |    | (h) Approved by board or committee? |    | (i) Written agreement? |    |
|-------------------------------|------------------------------------|---------------------|---------------------------------------|------|-------------------------------|-----------------|-----------------|----|-------------------------------------|----|------------------------|----|
|                               |                                    |                     | To                                    | From |                               |                 | Yes             | No | Yes                                 | No | Yes                    | No |
| (1)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (2)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (3)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (4)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (5)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (6)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (7)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (8)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (9)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (10)                          |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| Total . . . . . ▶             |                                    |                     |                                       |      |                               | \$              |                 |    |                                     |    |                        |    |

**Part III Grants or Assistance Benefiting Interested Persons.**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 27

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of assistance | (d) Type of assistance | (e) Purpose of assistance |
|-------------------------------|-----------------------------------------------------------------|--------------------------|------------------------|---------------------------|
| (1)                           |                                                                 |                          |                        |                           |
| (2)                           |                                                                 |                          |                        |                           |
| (3)                           |                                                                 |                          |                        |                           |
| (4)                           |                                                                 |                          |                        |                           |
| (5)                           |                                                                 |                          |                        |                           |
| (6)                           |                                                                 |                          |                        |                           |
| (7)                           |                                                                 |                          |                        |                           |
| (8)                           |                                                                 |                          |                        |                           |
| (9)                           |                                                                 |                          |                        |                           |
| (10)                          |                                                                 |                          |                        |                           |

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

Schedule L (Form 990 or 990-EZ) 2019

**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sharing of organization's revenues? |    |
|-------------------------------|-----------------------------------------------------------------|---------------------------|--------------------------------|-----------------------------------------|----|
|                               |                                                                 |                           |                                | Yes                                     | No |
| (1) APA HOLDING CORPORATION   | SUBIDIARY                                                       | 873,615                   | RENTAL PAYMENTS MADE           |                                         | X  |
| (2)                           |                                                                 |                           |                                |                                         |    |
| (3)                           |                                                                 |                           |                                |                                         |    |
| (4)                           |                                                                 |                           |                                |                                         |    |
| (5)                           |                                                                 |                           |                                |                                         |    |
| (6)                           |                                                                 |                           |                                |                                         |    |
| (7)                           |                                                                 |                           |                                |                                         |    |
| (8)                           |                                                                 |                           |                                |                                         |    |
| (9)                           |                                                                 |                           |                                |                                         |    |
| (10)                          |                                                                 |                           |                                |                                         |    |

**Part V Supplemental Information**

Provide additional information for responses to questions on Schedule L (see instructions)

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

Department of the Treasury  
Internal Revenue Service

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

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

▶ Attach to Form 990 or 990-EZ.

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

OMB No 1545-0047

**2019**

**Open to Public  
Inspection**

Name of the organization **ALLIED PILOTS ASSOCIATION**  
§ **HANK COFIELD**

Employer identification number  
**13-1982245**

FORM 990, PART VI, SECTION A, QUESTION 2

THE FOLLOWING OFFICERS AND DIRECTORS OF THE FILING ORGANIZATION HAVE A  
BUSINESS RELATIONSHIP WITH ONE ANOTHER BY VIRTUE OF THEIR POSITIONS AS  
OFFICERS AND DIRECTORS OF APA HOLDING CORPORATION:  
ERIC FERGUSON, PATRICK O'ROURKE, AND PAT CLARK

FORM 990, PART VI, SECTION A, QUESTIONS 6 & 7A

ALLIED PILOTS ASSOCIATION IS A LABOR UNION REPRESENTING, AS ITS MEMBERS,  
THE PILOTS OF AMERICAN AIRLINES. THE MEMBERS ELECT THE ORGANIZATION'S  
BOARD OF DIRECTORS, WHICH IS MADE UP OF MEMBERS OF THE ORGANIZATION.  
THERE ARE FOUR CLASSES OF MEMBERSHIP, INCLUDING APPRENTICE MEMBERS,  
ACTIVE MEMBERS, INACTIVE MEMBERS, AND HONORARY MEMBERS. ONLY ACTIVE  
MEMBERS ARE ELIGIBLE TO VOTE OR HOLD OFFICE.

FORM 990, PART VI, SECTION B, QUESTION 11B

THE ORGANIZATION ENGAGES A PAID PREPARER EXPERIENCED IN THE PREPARATION  
OF THE FORM 990 TO PREPARE THE FORM. THE DIRECTOR OF FINANCE AND  
ACCOUNTING WILL CONDUCT A DETAILED REVIEW OF THE RETURN AS PREPARED BY  
THE PREPARER. AN ELECTRONIC COPY OF THE FINAL FORM 990 WILL BE PROVIDED  
TO ALL MEMBERS OF THE BOARD OF DIRECTORS ON APA'S INTERNAL WEBSITE PRIOR  
TO FILING THE RETURN.

FORM 990, PART VI, SECTION B, QUESTION 12C

ALLIED PILOTS ASSOCIATION'S OFFICERS, BOARD MEMBERS, COMMITTEE MEMBERS

Name of the organization ALLIED PILOTS ASSOCIATION  
% HANK COFIELD

Employer identification number  
13-1982245

AND STAFF SHALL DISCLOSE CONFLICTS OF INTEREST BY SUBMITTING A "CONFLICT OF INTEREST DISCLOSURE" FORM. DISCLOSURES ARE HANDLED BY THE SECRETARY-TREASURER AND MAINTAINED IN A FILE. IF A POTENTIAL CONFLICT OF INTEREST ARISES, SUBSEQUENT TO THE SUBMISSION OF THE ORIGINAL FORM, A REVISED FORM SHALL BE SUBMITTED WITHIN FIVE BUSINESS DAYS OF BECOMING AWARE OF THE CONFLICT.

FORM 990, PART VI, SECTION B, QUESTIONS 15A & 15B  
THE COMPENSATION FOR ALL OFFICERS AND KEY EMPLOYEES OF ALLIED PILOTS ASSOCIATION (APA) IS FIXED BY THE PRESIDENT, SUBJECT TO THE APPROVAL OF THE BOARD OF DIRECTORS. THE ORGANIZATION HIRES AN OUTSIDE CONSULTANT TO REVIEW THE COMPENSATION OF OFFICERS AND KEY EMPLOYEES. THE CONSULTANT MATCHES APA'S POSITIONS TO SALARY SURVEYS FROM MULTIPLE SOURCES. EACH EMPLOYEE'S POSITION IS PLACED WITHIN A PAY GRADE. POSITIONS THAT UNDERGO A SIGNIFICANT CHANGE IN DUTIES ARE REEVALUATED FOR GRADE AND PLACEMENT WITHIN THEIR GRADE. COMPENSATION ADJUSTMENTS ARE MADE BY THE PRESIDENT AND APPROVED BY THE BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION C, QUESTION 19  
THE ORGANIZATION'S FINANCIAL STATEMENT ARE AVAILABLE TO THE PUBLIC AS PART OF ITS FILINGS WITH THE DEPARTMENT OF LABOR, AT THE DEPARTMENT OF LABOR'S WEBSITE (WWW.DOL.GOV/OLMS). THE ORGANIZATION DOES NOT MAKE ITS GOVERNING DOCUMENTS OR CONFLICTS OF INTEREST POLICY AVAILABLE TO THE PUBLIC. THIS INFORMATION IS AVAILABLE TO MEMBERS ONLY, UPON REQUEST.

FORM 990, PART VII, SECTION A  
COMPENSATION IN ADDITION TO COMPENSATION REPORTED BY ALLIED PILOTS

Name of the organization ALLIED PILOTS ASSOCIATION  
% HANK COFIELD

Employer identification number  
13-1982245

ASSOCIATION (APA) ON FORM W-2, APA ALSO REIMBURSES AMERICAN AIRLINES (AAL) FOR FLIGHT PAY LOSS (FPL) COMPENSATION. PILOTS, OTHER THAN APA OFFICERS, RECEIVED COMPENSATION OF \$13,578,398 FOR THE YEAR ENDED JUNE 30, 2020 WHILE ON LEAVE FROM AAL FOR APA BUSINESS. GENERALLY, AAL BILLS APA FOR SUCH COMPENSATION. APA REMITTED FPL REIMBURSEMENT PAYMENTS TO AAL LESS THE RECOVERY OF \$9,044,918 FOR THE YEAR ENDED JUNE 30, 2020 FOR THE PORTION OF SERVICES RENDERED BY THE PILOTS RELATED TO MATTERS INCLUDING SAFETY, SECURITY AND TRAINING PROGRAMS THAT BENEFITED AAL. THE REIMBURSED COMPENSATION IS REPORTED ON THE FORM 941 EMPLOYER'S QUARTERLY FEDERAL TAX RETURN OF AAL AND IS REPORTED TO THE RECIPIENTS ON THEIR FORMS W-2 RECEIVED FROM AAL. IN ADDITION TO THE LOST FLIGHT PAY, APA MAKES CONTRIBUTIONS TO THE AMERICAN AIRLINES CAPITAL ACCUMULATION PLAN. A RETIREMENT PLAN WHICH IS ADMINISTERED BY AAL CONSISTING OF THE DEFINED CONTRIBUTION OF 16% OF PAY FOR EMPLOYEES OF AAL CORPORATION AND PARTICIPATING SUBSIDIARIES. FOR PERIODS OF UNION LEAVE ON AND AFTER JANUARY 1, 2014, APA WILL MAKE THE COMPANY'S CONTRIBUTIONS. APA'S CONTRIBUTIONS TO THE PLAN TOTALED \$\_, \_\_\_, \_\_\_ FOR THE YEAR ENDED JUNE 30, 2020.

FORM 990, PART XI, LINE 9

OTHER CHANGES IN NET ASSETS OR FUND BALANCES

POST RETIREMENT CHANGES < 1,031,045 >

ELIMINATION OF ALLIED PILOTS ASSOC

EMPLOYEE RELIEF FUND < 7,209 >

TOTAL < 1,038,254 >

Name of the organization ALLIED PILOTS ASSOCIATION  
% HANK COFIELD

Employer identification number  
13-1982245

ATTACHMENT 1

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

TO SUPPORT THE MEMBERS OF THE ALLIED PILOTS ASSOCIATION AS FOLLOWS:

\*TO OPERATE A NON-PROFIT EMPLOYEE-REPRESENTING ASSOCIATION, A LABOR UNION

\*TO PROTECT THE INDIVIDUAL AND COLLECTIVE RIGHTS OF THE MEMBERS OF THE APA AND TO PROMOTE THEIR PROFESSIONAL INTERESTS, INCLUDING TIMELY PROSECUTION OF INDIVIDUAL AND COLLECTIVE GRIEVANCES

\*TO ESTABLISH AND TO EXERCISE THE RIGHT OF COLLECTIVE BARGAINING FOR THE PURPOSE OF MAKING AND MAINTAINING EMPLOYMENT AGREEMENTS COVERING RATES OF PAY, RULES, AND WORKING CONDITIONS FOR THE MEMBERS OF THE APA AND TO SETTLE PROMPTLY DISPUTES AND GRIEVANCES WHICH MAY ARISE BETWEEN SUCH MEMBERS AND THEIR EMPLOYER. APA MAINTAINS THE RIGHT TO RESOLVE INSTITUTIONAL AND INDIVIDUAL GRIEVANCES IN ITS SOLE DISCRETION AS THE COLLECTIVE BARGAINING REPRESENTATIVE OF THE PILOTS.

\*TO DETERMINE AND NEGOTIATE AND TO CONTINUE TO IMPROVE THE RATES OF COMPENSATION, BENEFITS, PENSIONS, HOURS OF EMPLOYMENT AND WORKING CONDITIONS, AND TO MAINTAIN UNIFORM PRINCIPLES OF SENIORITY AND THE PERPETUATION THEREOF.

\*TO ACHIEVE FULL RETROACTIVITY AND FULL PENSIONABILITY FOR ALL IMPROVEMENTS IN PAY FROM THE AMENDABLE DATE OF THE PREVIOUS AGREEMENT THROUGH THE DATE OF SIGNING OF A NEW AGREEMENT.

\*TO SPONSOR AND SUPPORT THE PASSAGE OF LEGISLATION AND APPROPRIATE REGULATIONS AFFECTING THE MEMBERSHIP AND THE INDUSTRY WHICH MAY BE BENEFICIAL TO THE PROFESSION OR TO THE INDUSTRY.

\*TO SAFEGUARD WITH CEASELESS VIGILANCE, THE SAFETY OF SCHEDULED AIR TRANSPORTATION IN RECOGNITION OF THE HIGH DEGREE OF PUBLIC TRUST, CONFIDENCE AND RESPONSIBILITY PLACED ON THE MEMBERS.

Name of the organization ALLIED PILOTS ASSOCIATION  
 % HANK COFIELD

Employer identification number  
 13-1982245

ATTACHMENT 1 (CONT'D)

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

\*TO FURTHER SCHEDULING WITH SAFETY IN ANY PRACTICAL MANNER.

\*TO DISSEMINATE INFORMATION IN ANY MANNER TO ENHANCE THE PROFESSIONAL STATUS OF THE MEMBERSHIP AND TO ENSURE A FULLY INFORMED MEMBERSHIP. A FUNDAMENTAL PRINCIPLE OF APA'S ABILITY TO EFFECTIVELY REPRESENT THE INTERESTS OF ITS MEMBERSHIP IS PROTECTING APA'S RIGHT TO COMMUNICATE WITH THE MEMBERSHIP WITHOUT RESTRICTION OR OUTSIDE APPROVALS.

THEREFORE, NO APA OFFICER, COMMITTEE MEMBER OR STAFF EMPLOYEE SHALL AGREE TO OR PARTICIPATE IN A COMMUNICATIONS "BLACKOUTOTHER" RESTRICTION OF THE FLOW OF INFORMATION FROM APA TO THE MEMBERSHIP INCLUDING PROPOSALS PRESENTED BY APA OF MANAGEMENT DURING NEGOTIATIONS.

\*TO LEVY DUES AND ASSESSMENTS UPON THE MEMBERSHIP WITH WHICH TO PROVIDE THE FUNDS NECESSARY TO CARRY ON THE BUSINESS AND OBJECTS OF THE ASSOCIATION.

\*TO PURCHASE, HOLD, ACQUIRE, LEASE, MORTGAGE, AND CONVEY REAL ESTATE AND PERSONAL PROPERTY OF EVERY KIND, NATURE, AND DESCRIPTION, IN ANY STATE, THE DISTRICT OF COLUMBIA, AND ANY TERRITORY OR POSSESSION OF THE UNITED STATES, FOR THE CONVENIENT CONDUCT AND EXECUTION OF THE ASSOCIATION'S BUSINESS, INCLUDING THE PURCHASING, LEASING, AND MAINTAINING OF EQUIPMENT, BUILDINGS, AND IMPROVEMENTS WHICH MAY BE NECESSARY, DIRECTLY OR INDIRECTLY, IN CONNECTION WITH ANY OF THE BUSINESS AND OBJECTS OF THE ASSOCIATION.

\*TO MAINTAIN MUTUAL AID PLANS.

\*TO EXCHANGE VIEWS AND INFORMATION WITH OTHER U.S. AND INTERNATIONAL PILOT ORGANIZATIONS AND TO COOPERATE ON ISSUES WHERE A MUTUAL BENEFIT IS POSSIBLE, SUCH AS SAFETY, COLLECTIVE BARGAINING, LEGISLATIVE AND

Name of the organization ALLIED PILOTS ASSOCIATION  
 % HANK COFIELD

Employer identification number  
13-1982245

ATTACHMENT 1 (CONT'D)

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

REGULATORY MATTERS.

\*TO DO ANY AND ALL OTHER ACTS CONSISTENT WITH AND IN FURTHERANCE OF  
 THE OBJECTIVES AND PURPOSES SET FORTH IN THE CONSTITUTION AND BYLAWS,  
 INCLUDING THE ESTABLISHMENT OF SUCH LEGAL ENTITIES AS NECESSARY TO  
 CARRY OUT THE LEGITIMATE OBJECTIVES AND PURPOSES OF THE ASSOCIATION.

ATTACHMENT 2

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

| <u>NAME AND ADDRESS</u>                                                          | <u>DESCRIPTION OF SERVICES</u> | <u>COMPENSATION</u> |
|----------------------------------------------------------------------------------|--------------------------------|---------------------|
| AMERINCA AIRLINES, INC.<br>4000 E. SKY HARBOR SERVICES<br>PHOENIX, AZ 85034      | PILOT/MEMBER                   | 14,758,761.         |
| APA HOLDING COMPANY C/O LINCOLN PROPERTY<br>2000 MCKINNEY<br>DALLAS, TX 75201    | PROPERTY                       | 1,081,872.          |
| DAVIS-DYER-MAX INSURANCE<br>3200 BROADWAY BLVD #400<br>GARLAND, TX 75043         | INSURANCE                      | 843,900.            |
| LAW OFFICES OF JAMES P. CLARK, PC<br>256 MAIN ST, STE 202<br>NORTHPORT, NY 11768 | LEGAL SERVICES                 | 743,804.            |
| SOGETI USA, LLC<br>PO BOX 633470<br>CINCINNATI, OH 45263                         | IT SERVICES                    | 1,597,360.          |

ATTACHMENT 3

Name of the organization ALLIED PILOTS ASSOCIATION  
% HANK COFIELDEmployer identification number  
13-1982245

ATTACHMENT 3 (CONT'D)

FORM 990, PART X - INVESTMENTS - PUBLICLY TRADED SECURITIES

| <u>DESCRIPTION</u>         | <u>ENDING<br/>BOOK VALUE</u> | <u>COST<br/>OR FMV</u> |
|----------------------------|------------------------------|------------------------|
| PUBLICLY TRADED SECURITIES | 51,016,874.                  | FMV                    |
| TOTALS                     | <u>51,016,874.</u>           |                        |

ATTACHMENT 4

FORM 990, PART X - DEFERRED REVENUE

| <u>DESCRIPTION</u> | <u>ENDING<br/>BOOK VALUE</u> |
|--------------------|------------------------------|
| DEFERRED REVENUE   | 12,146,589.                  |
| TOTALS             | <u>12,146,589.</u>           |

**SCHEDULE R  
(Form 990)****Related Organizations and Unrelated Partnerships**

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

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No 1545-0047

**2019**Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue ServiceName of the organization **ALLIED PILOTS ASSOCIATION**

Employer identification number

§ **HANK COFIELD****13-1982245****Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

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

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

|     | (a)<br>Name, address, and EIN of related organization                                                 | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Exempt Code section | (e)<br>Public charity status (if section 501(c)(3)) | (f)<br>Direct controlling entity | (g)<br>Section 512(b)(13) controlled entity? |    |
|-----|-------------------------------------------------------------------------------------------------------|-------------------------|--------------------------------------------------|----------------------------|-----------------------------------------------------|----------------------------------|----------------------------------------------|----|
|     |                                                                                                       |                         |                                                  |                            |                                                     |                                  | Yes                                          | No |
| (1) | APA HOLDING CORPORATION 75-2785182<br>14600 TRINITY BLVD STE 500 FORT WORTH, TX 76155                 | HOLDING CO              | TX                                               | 501 (C) (2)                |                                                     | APA                              | X                                            |    |
| (2) | ALLIED PILOT ASSOC SCHOLARSHIP FUND 75-2759329<br>14600 TRINITY BLVD STE 500 FORT WORTH, TX 76155     | SCH GRANTS              | TX                                               | 501 (C) (3)                | LINE 7                                              | APA                              | X                                            |    |
| (3) | APA POLITICAL ACTION COMMITTEE 75-2779340<br>14600 TRINITY BLVD STE 500 FORT WORTH, TX 76155          | POLITICAL               | TX                                               | 527                        |                                                     | APA                              | X                                            |    |
| (4) | APA EMERGENCY RELIEF & SCHOLARSHIP FUND 81-4427466<br>14600 TRINITY BLVD STE 500 FORT WORTH, TX 76155 | GRANTMAKING             | TX                                               | 501 (C) (3)                | PF                                                  | APA                              | X                                            |    |
| (5) | APA WELFARE BENEFITS PLAN MASTER TRUST 75-2589033<br>14600 TRINITY BLVD STE 500 FORT WORTH, TX 76155  | MBR BENEFITS            | TX                                               | 501 (C) (9)                |                                                     | APA                              | X                                            |    |
| (6) |                                                                                                       |                         |                                                  |                            |                                                     |                                  |                                              |    |
| (7) |                                                                                                       |                         |                                                  |                            |                                                     |                                  |                                              |    |

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

Schedule R (Form 990) 2019

**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)<br>Name, address, and EIN of<br>related organization | (b)<br>Primary activity | (c)<br>Legal<br>domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Predominant<br>income (related,<br>unrelated,<br>excluded from<br>tax under<br>sections 512 - 514) | (f)<br>Share of total<br>income | (g)<br>Share of end-of-<br>year assets | (h)<br>Disproportionate<br>allocations? |    | (i)<br>Code V - UBI<br>amount in box 20<br>of Schedule K-1<br>(Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>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)<br>Name, address, and EIN of related organization | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Type of entity<br>(C corp, S corp, or trust) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year assets | (h)<br>Percentage<br>ownership | (i)<br>Section<br>512(b)(13)<br>controlled<br>entity? |    |
|-------------------------------------------------------|-------------------------|--------------------------------------------------------|-------------------------------------|-----------------------------------------------------|---------------------------------|---------------------------------------|--------------------------------|-------------------------------------------------------|----|
|                                                       |                         |                                                        |                                     |                                                     |                                 |                                       |                                | Yes                                                   | No |
| (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

Note: 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 II-IV? |     |    |
| a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity . . . . .                                           | 1a  | X  |
| b Gift, grant, or capital contribution to related organization(s) . . . . .                                                                           | 1b  | X  |
| c Gift, grant, or capital contribution from related organization(s) . . . . .                                                                         | 1c  | X  |
| d Loans or loan guarantees to or for related organization(s) . . . . .                                                                                | 1d  | X  |
| e Loans or loan guarantees by related organization(s) . . . . .                                                                                       | 1e  | X  |
| f Dividends from related organization(s) . . . . .                                                                                                    | 1f  |    |
| g Sale of assets to related organization(s) . . . . .                                                                                                 | 1g  | X  |
| h Purchase of assets from related organization(s) . . . . .                                                                                           | 1h  | X  |
| i Exchange of assets with related organization(s) . . . . .                                                                                           | 1i  | X  |
| j Lease of facilities, equipment, or other assets to related organization(s) . . . . .                                                                | 1j  | X  |
| k Lease of facilities, equipment, or other assets from related organization(s) . . . . .                                                              | 1k  | X  |
| l Performance of services or membership or fundraising solicitations for related organization(s) . . . . .                                            | 1l  | X  |
| m Performance of services or membership or fundraising solicitations by related organization(s) . . . . .                                             | 1m  | X  |
| n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .                                             | 1n  | X  |
| o Sharing of paid employees with related organization(s) . . . . .                                                                                    | 1o  | X  |
| p Reimbursement paid to related organization(s) for expenses . . . . .                                                                                | 1p  | X  |
| q Reimbursement paid by related organization(s) for expenses . . . . .                                                                                | 1q  | X  |
| r Other transfer of cash or property to related organization(s) . . . . .                                                                             | 1r  | X  |
| s Other transfer of cash or property from related organization(s) . . . . .                                                                           | 1s  | X  |

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

| (a)<br>Name of related organization           | (b)<br>Transaction<br>type (a-s) | (c)<br>Amount involved | (d)<br>Method of determining<br>amount involved |
|-----------------------------------------------|----------------------------------|------------------------|-------------------------------------------------|
| (1) APA HOLDING CORPORATION                   | K                                | 873,615.               | CASH                                            |
| (2) APA EMERGENCY RELIEF AND SCHOLARSHIP FUND | B                                | 61,000.                | CASH                                            |
| (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)<br>Name, address, and EIN of entity | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or foreign<br>country) | (d)<br>Predominant<br>income (related,<br>unrelated, excluded<br>from tax under<br>sections 512-514) | (e)<br>Are all partners<br>section<br>501(c)(3)<br>organizations? |    | (f)<br>Share of<br>total income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Disproportionate<br>allocations? |    | (i)<br>Code V - UBI<br>amount in box 20<br>of Schedule K-1<br>(Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>ownership |
|-----------------------------------------|-------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|----|---------------------------------|------------------------------------------|-----------------------------------------|----|---------------------------------------------------------------------------|-------------------------------------------|----|--------------------------------|
|                                         |                         |                                                        |                                                                                                      | Yes                                                               | No |                                 |                                          | Yes                                     | No |                                                                           | Yes                                       | No |                                |
| (1)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (2)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (3)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (4)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (5)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (6)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (7)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (8)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (9)                                     |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (10)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (11)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (12)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (13)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (14)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (15)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |
| (16)                                    |                         |                                                        |                                                                                                      |                                                                   |    |                                 |                                          |                                         |    |                                                                           |                                           |    |                                |

**Part VII** Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions