Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

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

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

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

OMB No. 1545-0047

2021

Open to Public Inspection

A For the 2021 calendar year, or tax year beginning 10-01-2021 , and ending 09-30-2022

B Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
SOURCEAMERICA

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) 8401 OLD COURTHOUSE RD

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
VIENNA, VA 221823820

D Employer identification number
52-1007153

E Telephone number
(571) 226-4655

G Gross receipts $ 176,485,645

F Name and address of principal officer:
RICHARD BELDEN
8401 OLD COURTHOUSE RD
VIENNA,VA 221823820

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.

H(c) Group exemption number ▶

I Tax-exempt status: ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW.SOURCEAMERICA.ORG

K Form of organization: ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation: 1974

M State of legal domicile: DC

Part I Summary

1 Briefly describe the organization's mission or most significant activities:
CREATE EMPLOYMENT OPPORTUNITIES AND CHOICES FOR PEOPLE WITH SIGNIFICANT DISABILITIES.

Activities & Governance

2	Check this box ▶ ☐ 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**	22
4	Number of independent voting members of the governing body (Part VI, line 1b)	**4**	22
5	Total number of individuals employed in calendar year 2021 (Part V, line 2a)	**5**	460
6	Total number of volunteers (estimate if necessary)	**6**	25
7a	Total unrelated business revenue from Part VIII, column (C), line 12	**7a**	0
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	**7b**	0

		Prior Year	Current Year
Revenue			
8	Contributions and grants (Part VIII, line 1h)	0	0
9	Program service revenue (Part VIII, line 2g)	184,833,481	174,468,917
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	2,933,708	2,012,331
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	860,694	4,397
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	188,627,883	176,485,645
Expenses			
13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	2,428,456	1,978,395
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	63,184,518	66,819,734
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b	Total fundraising expenses (Part IX, column (D), line 25) ▶0		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	102,898,989	94,014,274
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	168,511,963	162,812,403
19	Revenue less expenses. Subtract line 18 from line 12	20,115,920	13,673,242

		Beginning of Current Year	End of Year
Net Assets or Fund Balances			
20	Total assets (Part X, line 16)	137,455,803	134,198,819
21	Total liabilities (Part X, line 26)	18,483,618	16,035,072
22	Net assets or fund balances. Subtract line 21 from line 20	118,972,185	118,163,747

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 — Date: 2023-02-08

JEFFREY W MCCAW CFO
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
		2023-02-08		P00397829

Firm's name ▶ RSM US LLP — Firm's EIN ▶ 42-0714325

Firm's address ▶ 1250 H STREET SUITE 700
WASHINGTON, DC 20005

Phone no. (202) 293-2200

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

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

PROVIDE EMPLOYMENT CHOICES FOR INDIVIDUALS WITH DISABILITIES THROUGH THE NONPROFIT AGENCY COMMUNITY.

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 $ 153,065,422 including grants of $ 1,978,395) (Revenue $ 174,468,917)

SOURCEAMERICA CONNECTS GOVERNMENT CUSTOMERS AND OTHER ORGANIZATIONS TO A NATIONAL NETWORK OF ABILITYONE(R) AUTHORIZED PROVIDERS THAT HIRE A TALENTED SEGMENT OF THE WORKFORCE-PEOPLE WITH DISABILITIES. ESTABLISHED IN 1974, SOURCEAMERICA IS COMMITTED TO INCREASING ECONOMIC AND SOCIAL INCLUSION AND ADVOCATING FOR A MORE ACCESSIBLE FUTURE OF WORK FOR PEOPLE WITH DISABILITIES. SOURCEAMERICA, AN ABILITYONE(R) AUTHORIZED ENTERPRISE, HARNESSES THE MOMENTUM AND BOOSTS THE CAPABILITY OF ITS NETWORK AND CUSTOMERS AS A LEADING JOB CONNECTOR FOR THE DISABILITY COMMUNITY. IT'S OUR VISION THAT EVERY AMERICAN WITH A DISABILITY HAS CAREER PATH AND EMPLOYMENT CHOICES. IN FY2021, THERE WERE MORE THAN 575 NONPROFIT AGENCIES IN THE SOURCEAMERICA NETWORK, EMPLOYING MORE THAN 65,000 PEOPLE WITH DISABILITIES. TO LEARN MORE, VISIT SOURCEAMERICA.ORG AND FOLLOW @SOURCEAMERICA ON FACEBOOK, TWITTER, INSTAGRAM, AND LINKEDIN.

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

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

4d Other program services (Describe in Schedule O.)
(Expenses $ including grants of $) (Revenue $)

4e **Total program service expenses** ▶ 153,065,422

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules *(continued)*

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

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	1a	101		
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c		Yes	

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

2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	**2a**	460		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.			**2b**	Yes
3a	Did the organization have unrelated business gross income of $1,000 or more during the year? . . .			**3a**	No
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation in Schedule O* . . .			**3b**	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			**4a**	No
b	If "Yes," enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . .			**5a**	No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			**5b**	No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			**5c**	
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . .			**6a**	No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			**6b**	
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			**7a**	No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			**7b**	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			**7c**	No
d	If "Yes," indicate the number of Forms 8282 filed during the year	**7d**			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			**7e**	No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			**7f**	No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			**7g**	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			**7h**	
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?			**8**	
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?			**9a**	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . .			**9b**	
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12 . . .	**10a**			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . . .	**10b**			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	**11a**			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	**11b**			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			**12a**	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	**12b**			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? . . . . . **Note.** See the instructions for additional information the organization must report on Schedule O.			**13a**	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	**13b**			
c	Enter the amount of reserves on hand	**13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year?			**14a**	No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O* . .			**14b**	
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?			**15**	No
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? . . If "Yes," complete Form 4720, Schedule O.			**16**	No
17	**Section 501(c)(21) organizations.** Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? . . If "Yes," complete Form 6069.			**17**	

Part VI **Governance, Management, and Disclosure.** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.*

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

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. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.	**1a**	22		
b	Enter the number of voting members included in line 1a, above, who are independent	**1b**	22		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		**2**		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		**3**		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		**4**	Yes	
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		**5**		No
6	Did the organization have members or stockholders?		**6**		No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		**7a**		No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		**7b**		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a	The governing body?		**8a**	Yes	
b	Each committee with authority to act on behalf of the governing body?		**8b**	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*		**9**		No

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

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

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 Form 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 in Schedule O)

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records:
▶THOMAS MURPHY 8401 OLD COURTHOUSE RD VIENNA,VA 221823820 (571) 226-4655

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

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

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or 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 the 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) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) 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) RICHARD BELDEN CEO (INTERIM CEO 9/20-10/21)	50.00			X				433,963	0	47,758
(2) HOWARD COOKE INTERIM COO	50.00			X				283,294	0	62,539
(3) CATHY COOKE SVP- ABILITYONE PROGRAMS	50.00				X			283,794	0	41,295
(4) JEFFREY MCCAW CFO	50.00			X				273,877	0	44,500
(5) MICHAEL CALDRONE VP - IT	50.00					X		236,854	0	61,922
(6) THOMAS HARTIGAN VP - ACCOUNT SERVICES	50.00					X		215,249	0	67,138
(7) JILL JOHNSON VP - PRODUCTS	50.00					X		221,323	0	52,643
(8) RICHARD GAZAWAY SR DIR - RGLTRY, OVRSGHT, MONITORING	50.00					X		212,776	0	52,544
(9) CHRIS STREAM VP - NPA NTWRK SRVCS (THRU 10/21)	50.00					X		210,403	0	47,853
(10) ANGELO GRIMA SVP AND GENERAL COUNSEL	50.00			X				205,466	0	18,243
(11) WES TYLER BOD THRU 12/21, COO AS OF 3/22	50.00	X		X				0	0	0
(12) NORM LORENTZ CHAIR	5.00	X		X				0	0	0
(13) BOB DANIELS INTERIM VICE CHAIR (AS OF 2/22)	5.00	X		X				0	0	0
(14) BRIAN BEHLER SECRETARY	5.00	X		X				0	0	0
(15) WILLIAM OGLETREE TREASURER	5.00	X		X				0	0	0
(16) PHYLLIS BARRETT DIRECTOR	1.50	X						0	0	0
(17) PETER BERNS DIRECTOR	1.50	X						0	0	0

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(18) JOHN BOGASKY DIRECTOR	1.50	X						0	0	0
(19) ARMANDO CONTRERAS DIRECTOR	1.50	X						0	0	0
(20) STEVE KATSURNIS VICE CHAIR (THRU 2/22)	1.50	X						0	0	0
(21) DAVID EAGLES DIRECTOR	1.50	X						0	0	0
(22) TERRY FARMER DIRECTOR (THRU 12/21)	1.50	X						0	0	0
(23) GREG GIDDENS DIRECTOR	1.50	X						0	0	0
(24) REGGIE HUGHES DIRECTOR	1.50	X						0	0	0
(25) BARBARA LEDUC DIRECTOR	1.50	X						0	0	0
(26) MARK LEZOTTE DIRECTOR	1.50	X						0	0	0
(27) CATHERINE MELOY DIRECTOR	1.50	X						0	0	0
(28) REUBEN ROTMAN DIRECTOR	1.50	X						0	0	0
(29) SHARON SMITH DIRECTOR	1.50	X						0	0	0
(30) CHARLOTTE HAMMOND DIRECTOR (THRU 7/22)	1.50	X						0	0	0
(31) ALLEN CONNELY DIRECTOR (FROM 7/22)	1.50	X						0	0	0
(32) DEBORAH COPELAND DIRECTOR (FROM 4/22)	1.50	X						0	0	0
(33) MARK HECHINGER DIRECTOR (FROM 4/22)	1.50	X						0	0	0
(34) KATE MCSWEENY DIRECTOR (FROM 4/22)	1.50	X						0	0	0
(35) LISA RAE WEBB SHARPE DIRECTOR (FROM 4/22)	1.50	X						0	0	0
1b Sub-Total . . . . . ▶										
c Total from continuation sheets to Part VII, Section A . . . . ▶										
d Total (add lines 1b and 1c) . . . . . ▶								2,576,999	0	496,435

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 ▶ 245

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

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
THE GINN GROUP 200 WESTPARK DRIVE SUITE 100 PEACHTREE, GA 30269	SUB-CONTRACTED BUILDING MAINTENANCE SERV	27,794,908
GOODWILL IND OF SOUTH FLORIDA 2121 NW 21ST ST MIAMI, FL 33142	MANUFACTURING OF M&D PRODUCTS	17,653,232
GLOBAL CONNECTIONS TO EMPLOYMENT 1221 WEST LAKEVIEW DR PENSACOLA, FL 32501	SUB-CONTRACTED BUILDING MAINTENANCE SERV	6,950,028
PICCOLA MANUFACTURING CO PO BOX 705 SHEPHERSVILLE, KY 40165	SUB-CONTRACTED BUILDING MAINTENANCE SERV	6,855,547
UD CONTRACTING INC 3049 LILAC RD LEITCHFIELD, KY 42754	SUB-CONTRACTED BUILDING MAINTENANCE SERV	4,779,524

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 58

Part VIII Statement of Revenue

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

	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants, and OtherAmt Similar Amounts				
1a Federated campaigns . . **1a**				
b Membership dues . . **1b**				
c Fundraising events . . **1c**				
d Related organizations **1d**				
e Government grants (contributions) **1e**				
f All other contributions, gifts, grants, and similar amounts not included above **1f**				
g Noncash contributions included in lines 1a - 1f:$ **1g**				
h Total. Add lines 1a-1f . . . . . ▶				
Program Service Revenue	Business Code			
2a FEES	900099	98,318,935	98,318,935	
b GOVERNMENT CONTRACTS	900099	75,983,340	75,983,340	
c NATIONAL CONFERENCE	900099	166,642	166,642	
d				
e				
f All other program service revenue.				
g Total. Add lines 2a–2f. . . . . ▶	174,468,917			
3 Investment income (including dividends, interest, and other similar amounts)		2,012,331		2,012,331
4 Income from investment of tax-exempt bond proceeds ▶				
5 Royalties . . . . . ▶				
	(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) . . . . . ▶				
	(i) Securities	(ii) Other		
7a Gross amount from sales of assets other than inventory **7a**				
b Less: cost or other basis and sales expenses **7b**				
c Gain or (loss) **7c**				
d Net gain or (loss) . . . . . ▶				
8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . **8a**				
b Less: direct expenses **8b**				
c Net income or (loss) from fundraising events . . ▶				
9a Gross income from gaming activities. See Part IV, line 19 . . . **9a**				
b Less: direct expenses **9b**				
c Net income or (loss) from gaming activities . . ▶				
10a Gross sales of inventory, less returns and allowances . . **10a**				
b Less: cost of goods sold . . **10b**				
c Net income or (loss) from sales of inventory . . ▶				
Other Revenue Miscellaneous Revenue	Business Code			
11a REIMBURSEMENTS AND OTHER	900099	4,397		4,397
b				
c				
d All other revenue				
e Total. Add lines 11a–11d . . . . . ▶		4,397		
12 Total revenue. See instructions . . . . ▶		176,485,645	174,468,917	0	2,016,728

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) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	1,978,395	1,978,395		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	925,531	813,048	112,483	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	47,969,763	44,251,093	3,718,670	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	4,240,613	3,908,343	332,270	
9 Other employee benefits	9,065,901	8,355,549	710,352	
10 Payroll taxes	4,617,926	4,256,092	361,834	
11 Fees for services (non-employees):				
a Management				
b Legal	413,348		413,348	
c Accounting	118,330		118,330	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	89,914		89,914	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	3,836,378	666,359	3,170,019	
12 Advertising and promotion	1,994,658	1,994,113	545	
13 Office expenses	1,254,711	1,151,526	103,185	
14 Information technology	6,165,183	5,836,388	328,795	
15 Royalties				
16 Occupancy	1,767,104	1,664,845	102,259	
17 Travel	2,411,369	2,297,406	113,963	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	1,314,806	1,227,965	86,841	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	1,521,677	1,440,675	81,002	
23 Insurance	757,477	713,721	43,756	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a SUBCONTRACTS	72,287,995	72,287,995		
b MISCELLANEOUS EXPENSE	536,826	507,162	29,664	
c POST RETIREMENT HEALTHC	-170,249		-170,249	
d BAD DEBT EXPENSE	-285,253	-285,253		
e All other expenses				
25 **Total functional expenses.** Add lines 1 through 24e	162,812,403	153,065,422	9,746,981	0
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 ▶ ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

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

				(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing			1	
	2	Savings and temporary cash investments		17,881,933	2	20,016,626
	3	Pledges and grants receivable, net			3	
	4	Accounts receivable, net		39,259,430	4	29,641,705
	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			5	
	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)			6	
	7	Notes and loans receivable, net		1,371,288	7	1,194,815
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges		1,300,148	9	1,290,268
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 32,984,242			
	b	Less: accumulated depreciation	10b 20,736,727	10,296,183	10c	12,247,515
	11	Investments—publicly traded securities		67,035,317	11	69,454,742
	12	Investments—other securities. See Part IV, line 11			12	
	13	Investments—program-related. See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11		311,504	15	353,148
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)		137,455,803	16	134,198,819
Liabilities	17	Accounts payable and accrued expenses		16,466,129	17	14,279,248
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D			21	
	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			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	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		2,017,489	25	1,755,824
	26	**Total liabilities.** Add lines 17 through 25		18,483,618	26	16,035,072
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ ☑ and complete lines 27, 28, 32, and 33.**				
	27	Net assets without donor restrictions		118,972,185	27	118,163,747
	28	Net assets with donor restrictions			28	
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ 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	Total net assets or fund balances		118,972,185	32	118,163,747
	33	Total liabilities and net assets/fund balances		137,455,803	33	134,198,819

Part XI Reconcilliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	176,485,645
2	Total expenses (must equal Part IX, column (A), line 25)	2	162,812,403
3	Revenue less expenses. Subtract line 2 from line 1	3	13,673,242
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	118,972,185
5	Net unrealized gains (losses) on investments	5	-14,481,680
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column	10	118,163,747

Part XII Financial Statements and Reporting

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

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☑ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☑ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		No
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 in Schedule O and describe any steps taken to undergo such audits.	3b		

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

SCHEDULE A (Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

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

▶ **Attach to Form 990 or Form 990-EZ.**

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

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
SOURCEAMERICA

Employer identification number
52-1007153

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

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state:

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)

9 ☐ An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:

10 ☑ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations . . . . . .

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	(iv) No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)** (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . .						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge..						
4 **Total.** Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . .						
6 **Public support.** Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4. .						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . .						
9 Net income from unrelated business activities, whether or not the business is regularly carried on . .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). .						
11 **Total support.** Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) 12

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . . ▶☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2021 (line 6, column (f) divided by line 11, column (f)) 14

15 Public support percentage for 2020 Schedule A, Part II, line 14 15

16a **33 1/3% support test—2021.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶☐

b **33 1/3% support test—2020.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶☐

17a **10%-facts-and-circumstances test—2021.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶☐

b **10%-facts-and-circumstances test—2020.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶☐

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

Part III Support Schedule for Organizations Described in Section 509(a)(2)

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	161,059,454	156,626,080	156,573,830	184,833,481	174,468,917	833,561,762
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . .						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5	161,059,454	156,626,080	156,573,830	184,833,481	174,468,917	833,561,762
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						0
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year .	85,494,592	81,075,888	80,375,231	99,148,510	103,406,588	449,500,809
c Add lines 7a and 7b. .	85,494,592	81,075,888	80,375,231	99,148,510	103,406,588	449,500,809
8 **Public support.** (Subtract line 7c from line 6.)						384,060,953

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
9 Amounts from line 6. . .	161,059,454	156,626,080	156,573,830	184,833,481	174,468,917	833,561,762
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . .	924,398	1,441,736	1,400,014	1,699,985	2,012,331	7,478,464
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.	12,911					12,911
c Add lines 10a and 10b.	937,309	1,441,736	1,400,014	1,699,985	2,012,331	7,491,375
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on .						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . .	245,690	1,414,215	-6,360	860,694	4,397	2,518,636
13 **Total support.** (Add lines 9, 10c, 11, and 12.). .	162,242,453	159,482,031	157,967,484	187,394,160	176,485,645	843,571,773

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**. . . . . ▶☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2021 (line 8, column (f) divided by line 13, column (f))	15	45.530 %
16	Public support percentage from 2020 Schedule A, Part III, line 15	16	47.960 %

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2021** (line 10c, column (f) divided by line 13, column (f))	17	0.890 %
18	Investment income percentage from **2020** Schedule A, Part III, line 17	18	0.800 %

19a **33 1/3% support tests—2021.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶☑

b **33 1/3% support tests—2020.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . ▶☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . . ▶☐

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

			Yes	No
1	Did the officers, directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? *If "No," describe in* ***Part VI*** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.*	1		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* ***Part VI*** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.*	2		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in* ***Part VI*** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).*	1		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? *If "No," explain in* ***Part VI*** *how the organization maintained a close and continuous working relationship with the supported organization(s).*	2		
3	By reason of the relationship described in line 2 above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* ***Part VI*** *the role the organization's supported organizations played in this regard.*	3		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year **(see instructions)**:

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

2 Activities Test. **Answer lines 2a and 2b below.**

			Yes	No
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* ***Part VI identify those supported organizations and explain*** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	2a		
b	Did the activities described on line 2a, above constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* ***Part VI*** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	2b		

3 Parent of Supported Organizations. **Answer lines 3a and 3b below.**

a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No", provide details in* ***Part VI.***	3a		
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? *If "Yes," describe in* ***Part VI.*** *the role played by the organization in this regard.*	3b		

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

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

Section A - Adjusted Net Income

			(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1		
2	Recoveries of prior-year distributions	2		
3	Other gross income (see instructions)	3		
4	Add lines 1 through 3	4		
5	Depreciation and depletion	5		
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7	Other expenses (see instructions)	7		
8	**Adjusted Net Income** (subtract lines 5, 6 and 7 from line 4)	8		

Section B - Minimum Asset Amount

			(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	1		
a	Average monthly value of securities	1a		
b	Average monthly cash balances	1b		
c	Fair market value of other non-exempt-use assets	1c		
d	**Total** (add lines 1a, 1b, and 1c)	1d		
e	**Discount** claimed for blockage or other factors (*explain in detail in **Part VI***):			
2	Acquisition indebtedness applicable to non-exempt use assets	2		
3	Subtract line 2 from line 1d	3		
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6	Multiply line 5 by 0.035	6		
7	Recoveries of prior-year distributions	7		
8	**Minimum Asset Amount** (add line 7 to line 6)	8		

Section C - Distributable Amount

			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	**Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	

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

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

Section D - Distributions		**Current Year**
1 Amounts paid to supported organizations to accomplish exempt purposes	**1**	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	**2**	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	**3**	
4 Amounts paid to acquire exempt-use assets	**4**	
5 Qualified set-aside amounts (*prior IRS approval required - provide details in* ***Part VI***)	**5**	
6 Other distributions (*describe in* ***Part VI***). See instructions	**6**	
7 **Total annual distributions.** Add lines 1 through 6.	**7**	
8 Distributions to attentive supported organizations to which the organization is responsive (*provide details in* ***Part VI***). See instructions	**8**	
9 Distributable amount for 2021 from Section C, line 6	**9**	
10 Line 8 amount divided by Line 9 amount	**10**	

Section E - Distribution Allocations (see instructions)	**(i) Excess Distributions**	**(ii) Underdistributions Pre-2021**	**(iii) Distributable Amount for 2021**
1 Distributable amount for 2021 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2021 (reasonable cause required-- *explain in* ***Part VI***). See instructions.			
3 Excess distributions carryover, if any, to 2021:			
a From 2016.			
b From 2017.			
c From 2018.			
d From 2019.			
e From 2020.			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2021 distributable amount			
i Carryover from 2016 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2021 from Section D, line 7: $			
a Applied to underdistributions of prior years			
b Applied to 2021 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, *explain in* ***Part VI***. See instructions.			
6 Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, *explain in* ***Part VI***. See instructions.			
7 **Excess distributions carryover to 2022.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2017.			
b Excess from 2018.			
c Excess from 2019.			
d Excess from 2020.			
e Excess from 2021.			

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

Facts And Circumstances Test

Return Reference	Explanation
SCHEDULE A, PART III, LINE 12, EXPLANATION OF OTHER INCOME:	OTHER - 2017 AMOUNT: $ 245,690. 2018 AMOUNT: $ 1,414,215. 2019 AMOUNT: $ -6,360. 2020 AMOUNT: $ 80,694. 2021 AMOUNT: $ 4,397. INVENTORY SETTLEMENT - 2020 AMOUNT: $ 780,000.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE C (Form 990)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶**Complete if the organization is described below.** ▶**Attach to Form 990 or Form 990-EZ.**
▶**Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of the organization	**Employer identification number**
SOURCEAMERICA	52-1007153

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for definition of "political campaign activities."

2 Political campaign activity expenditures. See instructions ▶ $

3 Volunteer hours for political campaign activities. See instructions

Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 $

2 Enter the amount of any excise tax incurred by organization managers under section 4955 $

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No

4a Was a correction made? ☐ Yes ☐ No

b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities $

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ $

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ▶ $

4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No

5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

	(a) Name	**(b)** Address	**(c)** EIN	**(d)** Amount paid from filing organization's funds. If none, enter -0-.	**(e)** Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
1					
2					
3					
4					
5					
6					

Part II-A **Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

A Check ▶ ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

B Check ▶ ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)	(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)	204,466	
b Total lobbying expenditures to influence a legislative body (direct lobbying)	144,423	
c Total lobbying expenditures (add lines 1a and 1b)	348,889	
d Other exempt purpose expenditures	162,463,514	
e Total exempt purpose expenditures (add lines 1c and 1d)	162,812,403	
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.	1,000,000	

If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:
Not over $500,000	20% of the amount on line 1e.
Over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000.
Over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000.
Over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000.
Over $17,000,000	$1,000,000.

g Grassroots nontaxable amount (enter 25% of line 1f)	250,000	
h Subtract line 1g from line 1a. If zero or less, enter -0-.	0	
i Subtract line 1f from line 1c. If zero or less, enter -0-.	0	

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ **Yes** ☐ **No**

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) Total
2a Lobbying nontaxable amount	1,000,000	1,000,000	1,000,000	1,000,000	4,000,000
b Lobbying ceiling amount (150% of line 2a, column(e))					6,000,000
c Total lobbying expenditures	639,286	57,967	113,927	348,889	1,160,069
d Grassroots nontaxable amount	250,000	250,000	250,000	250,000	1,000,000
e Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000
f Grassroots lobbying expenditures	131,848	31,817	71,543	204,466	439,674

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.		(a) Yes	(a) No	(b) Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a	Volunteers?			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c	Media advertisements?			
d	Mailings to members, legislators, or the public?			
e	Publications, or published or broadcast statements?			
f	Grants to other organizations for lobbying purposes?			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?			
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
i	Other activities?			
j	Total. Add lines 1c through 1i			
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b	If "Yes," enter the amount of any tax incurred under section 4912			
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

			Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1		
2	Did the organization make only in-house lobbying expenditures of $2,000 or less?	2		
3	Did the organization agree to carry over lobbying and political expenditures from the prior year?	3		

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) nondeductible lobbying and political expenditures **(do not include amounts of political expenses for which the section 527(f) tax was paid).**		
a	Current year	2a	
b	Carryover from last year	2b	
c	Total	2c	
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5	Taxable amount of lobbying and political expenditures. See Instructions	5	

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
PART I-A LINE 1:	THE ORGANIZATION DOES NOT ENGAGE IN DIRECT OR INDIRECT POLITICAL CAMPAIGN ACTIVITIES.

Additional Data

Return to Form

Software ID:

Software Version:

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* for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
SOURCEAMERICA

Employer identification number
52-1007153

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? ☐ Yes ☐ 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? ☐ Yes ☐ 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).

☐ Preservation of land for public use (e.g., recreation or education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

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

		Held at the End of the 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 ▶ $ _____

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

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

- **a** ☐ Public exhibition
- **b** ☐ Scholarly research
- **c** ☐ Preservation for future generations
- **d** ☐ Loan or exchange programs
- **e** ☐ Other .....

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 in Part XIII . . . . ☐

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 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		1,958,528		1,958,528
b Buildings		12,581,513	9,657,847	2,923,666
c Leasehold improvements				
d Equipment		841,859	747,363	94,496
e Other		17,602,342	10,331,517	7,270,825
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ▶				12,247,515

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 (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3)Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 12.)* ▶		

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: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. *(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)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 15.)* ▶	

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	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 25.)* ▶	1,755,824

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☐

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	161,914,051
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a	-14,481,680		
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	-14,481,680
3	Subtract line **2e** from line **1**			3	176,395,731
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	89,914		
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	89,914
5	Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.)			5	176,485,645

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	162,722,489
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	0
3	Subtract line **2e** from line **1**			3	162,722,489
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	89,914		
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	89,914
5	Total expenses. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18.)			5	162,812,403

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.

Return Reference	Explanation

Additional Data

Return to Form

Software ID:

Software Version:

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
SOUKCEAMERICA

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

Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

Employer identification number
52-1007153

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.

(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) CW RESOURCES INC 200 WHITE STREET NEW BRITAIN,CT 06053	06-0806499	501C3	73,761	0			CMHC, SECURITY AWARENESS, 14C TRANSITION GRANTS
(2) KNOX COUNTY ASSOC FOR REMARKABLE CITIZENS INC 2525 N 6TH STREET VINCENNES,IN 47591	35-1182638	501C3	71,000	0			CMHC, 14C TRANSITION , NPA TRAINING GRANTS
(3) TAC INDUSTRIES INC 2330 OLD SELMA ROAD SPRINGFIELD,OH 45503	31-1078646	501C3	68,000	0			CMHC, 14C TRANSITION, ERS GRANTS
(4) COTTONWOOD INC 2801 WEST 31ST STREET LAWRENCE,KS 66047	48-0780431	501C3	65,795	0			14C TRANSITION, ERS GRANTS
(5) MVR SERVICES INC 1801 7TH ST SE PO BOX 1848 MINOT,ND 58702	45-0461622	501C3	63,853	0			QWE, SECURITY AWARENESS, 14C TRANSITION AND TRAINING, COMPLIANCE, AND CERTIFICATION GRANTS
(6) BREVARD ENTERPRISES CTR INC 1845 COCOMBS STREET ROCKLEDGE,FL 32955	59-1203280	501C3	60,959	0			QWE, 14C TRANSITION AND NPA TRAINING VOUCHER GRANTS
(7) MEACON GROUP SW INC 308 W GLENN ST TUCSON,AZ 85705	86-0107976	501C3	54,517	0			QWE, 14C TRANSITION GRANTS
(8) NW WORKS INC 3085 SHAWNEE DRIVE WINCHESTER,VA 22601	54-0880043	501C3	53,845	0			14C TRANSITION,GROWTH, TECHNOLOGY, & MODERNIZATION AND NPA TRAINING VOUCHERS GRANTS
(9) HUMAN RESOURCES CENTER OF EDGAR AND CLARK COUNTIES PO BOX 1118 PARIS,IL 61944	37-0922390	501C3	53,560	0			14C TRANSITION, NPA TRAINING VOUCHERS GRANTS
(10) FONTANA RESOURCES AT WORK INC 9453 ALDER FONTANA,CA 92334	95-2430724	501C3	51,940	0			14C TRANSITION, NPA TRAINING VOUCHERS GRANTS
(11) WIREGRASS REHABILITATION CTR 795 ROSS CLARK CIRCLE DOTHAN,AR 36303	63-0523650	501C3	50,059	0			EMERGENCY SUPPORT, SECURITY AWARENESS, ERS, GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS, COMPLIANCE, & CERTIFICATION GRANTS
(12) SKILLS INC 715 35TH STREET NE AUBURN,WA 98002	56-1234184	501C3	50,000	0			CMHC GRANT
(13) TRADEWINDS SERVICES INC 3194 EAST BEAD PLACE MERRILLVILLE,IN 46410	35-1139485	501C3	47,566	0			QWE, ERS, GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(14) PALMETTO DEVELOPMENT SERVICES 5000 EAGLE DRIVE NORTH CHARLESTON,SC 29406	57-0632511	501C3	43,909	0			CMHC, QWE, ERS, NPA TRAINING VOUCHERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(15) GOODWILL EASTER SEALS MIAMI VALLEY 600 SOUTH MAIN STREET DAYTON,OH 45402	31-0537112	501C3	38,500	0			CMHC, QWE, ERS, GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(16) FRIENDSHIP INDUSTRIES 801 FRIENDSHIP DRIVE HARRISONBURG,VA 22802	54-6073412	501C3	37,340	0			QWE, GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(17) THE ARC JEFFERSON ST LAWRENCE PO BOX 41 WATERTOWN,NY 13601	16-1134631	501C3	33,361	0			QWE, ERS, GROWTH, TECHNOLOGY, & MODERNIZATION AND TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(18) NOBIS ENTERPRISES INC 1480 BELKS FERRY ROAD MARIETTA,GA 30066	58-1290439	501C3	33,087	0			GROWTH, TECHNOLOGY, & MODERNIZATION, MANAGEMENT ASSISTANCE GRANTS
(19) GOODWILL SERVICES INC 6301 MIDLOTHIAN TURNPIKE RICHMOND,VA 23225	54-1821538	501C3	30,892	0			CMHC, QWE, ERS, GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS GRANTS
(20) GRAND TRAVERSE INDUSTRIES 2170 TRAVERSEFIELD DRIVE TRAVERSE CITY,MI 49686	38-2090521	501C3	29,949	0			GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS GRANTS
(21) MOZAIC 1083 WATERLOO-GENEVA ROAD WATERLOO,NY 13165	16-1124314	501C3	28,500	0			ERS, GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS GRANTS
(22) LOUISIANA IND FOR THE DISABLED 1979 BRAINMONT DRIVE BATON ROUGE,LA 70806	72-1033793	501C3	27,675	0			EMERGENCY SUPPORT, QWE, ERS, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(23) ASPIRO INC 1673 DOUSMAN STREET GREEN BAY,WI 54303	39-0987024	501C3	26,725	0			QWE GRANT
(24) NAVIGATIONS INC 4820 WAYNE ROAD BATTLE CREEK,MI 49037	38-3029800	501C3	26,311	0			EMERGENCY SUPPORT, NPA TRAINING VOUCHERS GRANTS
(25) GOODWILL INDUSTRIES OF SAN ANTONIO 406 W COMMERCE SAN ANTONIO,TX 78207	46-0688991	501C3	25,000	0			CMHC, QWE GRANTS
(26) EMMRSH INC 2700 E 7TH STREET CLOVIS,NM 88101	85-0213360	501C3	25,000	0			ERS GRANT
(27) 781-DEVELOPMENT CENTER OF AIKEN COUNTY INC PO BOX 1496 AIKEN,SC 29802	57-0669586	501C3	24,165	0			GROWTH, TECHNOLOGY, & MODERNIZATION, NPA TRAINING VOUCHERS GRANTS
(28) SKILLVIEW 4004 EAST BOONE AVE SPOKANE,WA 99202	91-0856829	501C3	22,236	0			CMHC, SECURITY AWARENESS, 14C TRANSITION, NPA TRAINING VOUCHERS GRANTS
(29) THE CORPORATE SOURCE 1225 FRANKLIN AVENUE STE 325 GARDEN CITY,NY 11530	13-3882284	501C3	22,000	0			NPA TRAINING VOUCHERS GRANT
(30) GARTEN SERVICES INC PO BOX 13970 SALEM,OR 97309	93-0582604	501C3	21,882	0			ERS, GROWTH, TECHNOLOGY, & MODERNIZATION GRANTS
(31) ENDEAVORS UNLIMITED INC 6363 DEZAVALA RD SAN ANTONIO,TX 78249	74-2618398	501C3	21,000	0			QWE, GROWTH, TECHNOLOGY, & MODERNIZATION GRANTS
(32) CHALLENGE UNLIMITED INC 1 CONNELL LANE CONNELL,WA 99326	37-0805566	501C3	20,658	0			NPA TRAINING VOUCHERS GRANT
(33) VIA OF THE LEHIGH VALLEY INC 336 WEST SPRUCE STREET BETHLEHEM,PA 18018	23-1457999	501C3	20,562	0			QWE, SECURITY AWARENESS, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(34) GLOBAL CONNECTIONS TO EMPLOYMENT INC 1221 W LAKEVIEW AVE PENSACOLA,FL 32501	47-2592811	501C3	20,000	0			NPA TRAINING VOUCHERS GRANT
(35) RISING STAR RESOURCE DEVELOPMENT CORP 1600 N LOYD STREET SUITE B DALLAS,TX 75204	86-1067010	501C3	19,534	0			NPA TRAINING VOUCHERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(36) YOLO EMPLOYMENT SERVICES 640 SIXTH STREET WOODLAND,CA 95695	94-1680532	501C3	18,500	0			QWE, ERS GRANTS
(37) POWER WORKS INDUSTRIES INC 2601 CROSS COUNTRY DRIVE BLDG A COLUMBUS,GA 31906	58-2267548	501C3	18,472	0			QWE, NPA TRAINING VOUCHERS GRANTS
(38) SARA'S MENTORING PLACE 517 CENTRAL DRIVE VIRGINIA BEACH,VA 23454	75-3111480	501C3	17,000	0			CMHC GRANT
(39) BAYAUD INDUSTRIES INC 333 W BAYAUD AVE DENVER,CO 80223	84-0616970	501C3	16,423	0			ERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(40) SERVICE DISABLED VETERANS BUSINESS ASSOCIATION 2214 LANARETTE WAY SILVER SPRING,MD 20906	77-0458758	501C3	16,185	0			ERS GRANT
(41) SERVICESOURCE INC 10467 WHITE GRANITE DRIVE OAKTON,VA 22124	54-0901256	501C3	16,000	0			CMHC GRANT
(42) GOODWILL IND SOUTH FLORIDA 2121 NW 2ND STREET MIAMI,FL 33142	59-0866126	501C3	16,000	0			ERS GRANT
(43) ACCESS SUPPORTS FOR LIVING INC 15 FORTUNE ROAD WEST MIDDLETOWN,NY 10941	14-1471097	501C3	15,637	0			QWE AND ERS GRANTS
(44) SOUTHEASTRN KENTUCKY REHABINC 1205 WEST CUMBERLAND GAP PARKWAY CORBIN,KY 40702	61-0725475	501C3	15,500	0			EMERGENCY SUPPORT AND NPA TRAINING VOUCHERS GRANTS
(45) ANTHONY WAYNE REHABILITATION CENTER FOR HANDICAPPED & BLIND INC 8515 BLUFFTON ROAD FORT WAYNE,IN 46809	35-1049596	501C3	15,225	0			QWE, 14C TRANSITION, NPA TRAINING VOUCHERS GRANTS
(46) SKOOKUM EDUCATIONAL PROGRAMS PO BOX 5359 BREMERTON,WA 98312	91-1434778	501C3	14,692	0			QWE, ERS, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(47) GOODWILL INDUSTRIES INC 553 FAIRVIEW AVE N ST PAUL,MN 55104	47-0378996	501C3	14,093	0			ERS, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(48) ALLIED HEALTHCARE SERVICES 1320 TOWN EXECUTIVE PARK CLARKS SUMMIT,PA 18411	24-0860110	501C3	13,884	0			ERS, NPA TRAINING VOUCHERS GRANTS
(49) DEVELOPMENT WORKSHOP INC 555 WEST 25TH STREET IDAHO FALLS,ID 83402	82-0303456	501C3	13,789	0			QWE, NPA TRAINING VOUCHERS GRANTS
(50) SCHENECTADY COUNTY CHAPTER NARC 216 STATE STREET SCHENECTADY,NY 12305	14-1459277	501C3	13,495	0			QWE, 14C TRANSITION, NPA TRAINING VOUCHERS GRANTS
(51) WORK SERVICES CORPORATION 1342 HATTON ROAD WICHITA FALLS,TX 76302	76-2247311	501C3	12,860	0			CMHC, NPA TRAINING VOUCHERS GRANTS
(52) ZOOM GROUP INC 1904 EMBASSY SQUARE BLVD LOUISVILLE,KY 40299	61-1101882	501C3	12,245	0			QWE, ERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(53) ISRONE 1085 S YUMA AVE CHANDLER,AZ 85226	43-0922133	501C3	11,730	0			QWE GRANT
(54) EVERY CITIZEN HAS OPPORTUNITIES INC P O BOX 2277 LEESBURG,VA 20177	54-0972486	501C3	11,557	0			CMHC, ERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(55) YAKIMA SPECIALTIES INC 1819 WEST J STREET YAKIMA,WA 98902	91-0774342	501C3	11,000	0			QWE, NPA TRAINING VOUCHERS GRANTS
(56) SUNSHINE VILLAGE INC 75 LITWIN LANE CHICOPEE,MA 01020	04-6190469	501C3	11,000	0			QWE, NPA TRAINING VOUCHERS GRANTS
(57) GOODWILL INDUSTRIAL SERVICES CORPORATION 1440 GARDEN OF THE GODS ROAD COLORADO SPRINGS,CO 80907	84-1273701	501C3	10,000	0			GROWTH, TECHNOLOGY, & MODERNIZATION GRANTS
(58) JEWISH VOCATIONAL SERVICE AND COMMUNITY WORKSHOP 29699 SOUTHFIELD ROAD SOUTHFIELD,MI 48076	38-1358013	501C3	10,000	0			CUSTODIAL AND CERTIFICATION GRANT
(59) VGS INC 2239 EAST 55TH STREET CLEVELAND,OH 44103	34-1873704	501C3	10,000	0			NPA TRAINING VOUCHERS GRANT
(60) PORTCO INC 7025 HARBOUR VIEW BLVD SUFFOLK,V A 23435	54-1598359	501C3	10,000	0			NPA TRAINING VOUCHERS GRANT
(61) EDLEAKE INC 8641 BREEDEN AVENUE MANASSAS,VA 20110	54-0963833	501C3	10,000	0			NPA TRAINING VOUCHERS GRANT
(62) BOBBY DODD INSTITUTE 2120 MARIETTA BLVD NW ATLANTA,GA 30318	58-1847107	501C3	10,000	0			14C TRANSITION GRANT
(63) LOS ANGELES HABILITATION HOUSE 2041 SAN GABRIEL AVE LONG BEACH,CA 90810	20-8579946	501C3	10,000	0			NPA TRAINING VOUCHERS GRANT
(64) LOCKING-KNOX GOODWILL INDUSTRIES INC 45 SOUTH FIFTH STREET NEWARK,OH 43058	31-0921782	501C3	10,000	0			NPA TRAINING VOUCHERS GRANT
(65) FRABLE/TAH 535 W STOCKMAN WAY OGDEN,UT 84403	87-0283745	501C3	9,692	0			NPA TRAINING VOUCHERS GRANT
(66) PUERTO RICO INDUSTRIES FOR THE BLIND CORP 2010 JAIME RODRIGUEZ 95 MAYAGUEZ,PR 00682	66-0800062	501C3	9,650	0			ERS, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(67) BH SERVICES INC 1001 FOURTH AVE RAPID CITY,SD 57702	36-4081426	501C3	8,400	0			GROWTH, TECHNOLOGY, & MODERNIZATION GRANT
(68) NEW LEAF INC PO BOX 943 OAK HARBOR,WA 98277	91-0847513	501C3	7,800	0			NPA TRAINING VOUCHERS GRANT
(69) LAKE REGION CORPORATION 224 3RD ST NW DEVILS LAKE,ND 58301	45-0383900	501C3	7,500	0			ERS GRANT
(70) WORK INC 1 MORGAN ST DORCHESTER,MA 02122	23-7100726	501C3	7,500	0			QWE GRANT
(71) THE CENTERS FOR HABILITATION 215 WEST LODGE DRIVE TEMPE,AZ 85283	86-0217033	501C3	7,230	0			NPA TRAINING VOUCHERS GRANT
(72) LANAKILA PACIFIC 1400 WEST EASTERDAY AVE UNIT STE MAKIE,MI 49783	99-0103922	501C3	6,815	0			ERS, NPA TRAINING VOUCHERS GRANTS
(73) NORTHERN TRANSITIONS INC 1401 WEST EASTERDAY AVE UNIT STE MAKIE,MI 49783	38-1876470	501C3	6,720	0			ERS, NPA TRAINING VOUCHER, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(74) NORTHERN NEW ENGLAND EMPLOYMENT SERVICES 34 HUTCHERSON DRIVE GORHAM,ME 04038	01-0530888	501C3	6,000	0			ERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(75) LILLIE RICE INC 2616 E ISAACS AVENUE WALLA WALLA,WA 99362	91-0789757	501C3	5,997	0			QWE GRANT
(76) GW COMMERCIAL SERVICES INC 1835 W MICHIGAN STREET INDIANAPOLIS,IN 46222	35-2082941	501C3	5,822	0			IT LAUNCH, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS
(77) COMMUNITY WORKSHOPS INC 174 PORTLAND STREET BOSTON,MA 02114	04-2103560	501C3	5,771	0			QWE GRANT
(78) TOOLWORKS 25 KEARNY STREET SUITE 400 SAN FRANCISCO,CA 94108	94-2493384	501C3	5,479	0			NPA TRAINING VOUCHERS GRANT
(79) CENTER INDUSTRIES CORPORATION PO BOX 17364 WICHITA,KS 67217	48-0823001	501C3	5,376	0			NPA TRAINING VOUCHERS, TRAINING, COMPLIANCE, & CERTIFICATION GRANTS

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 79

3 Enter total number of other organizations listed in the line 1 table 0

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 noncash assistance	**(e)** Method of valuation (book, FMV, appraisal, other)	**(f)** Description of noncash 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.

Return Reference	Explanation
PART I, LINE 2:	GRANTS ARE AWARDED BASED ON SPECIFIC CRITERIA.

Additional Data

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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 for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
SOURCEAMERICA

Employer identification number
52-1007153

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.			
	☐ First-class or charter travel	☐ Housing allowance or residence for personal use		
	☐ Travel for companions	☐ Payments for business use of personal residence		
	☑ Tax idemnification and gross-up payments	☑ Health or social club dues or initiation fees		
	☐ Discretionary spending account	☐ Personal services (e.g., maid, chauffeur, chef)		
b	If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	**1b**	Yes	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?	**2**	Yes	
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.			
	☑ Compensation committee	☑ Written employment contract		
	☑ Independent compensation consultant	☑ Compensation survey or study		
	☑ Form 990 of other organizations	☑ 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?	**4a**		No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement?	**4c**		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.			
	Only 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?	**5a**		No
b	Any related organization?	**5b**		No
	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?	**6a**		No
b	Any related organization?	**6b**		No
	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 in lines 5 and 6? If "Yes," describe in Part III	**7**	Yes	
8	Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	**8**		No
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	**9**		

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 are not listed on Form 990, Part VII.

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

(A) Name and Title		**(B)** Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC			**(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				
1RICHARD BELDEN CEO (INTERIM CEO 9/20-10/21)	**(i)**	309,663	124,300	0	21,473	26,285	481,721	0
	(ii)	0	0	0	0	0	0	0
2HOWARD COOKE INTERIM COO	**(i)**	261,044	22,250	0	27,390	35,149	345,833	0
	(ii)	0	0	0	0	0	0	0
3CATHY COOKE SVP- ABILITYONE PROGRAMS	**(i)**	273,794	10,000	0	27,915	13,380	325,089	0
	(ii)	0	0	0	0	0	0	0
4JEFFREY MCCAW CFO	**(i)**	263,541	10,336	0	27,760	16,740	318,377	0
	(ii)	0	0	0	0	0	0	0
5MICHAEL CALDRONE VP - IT	**(i)**	226,985	9,869	0	26,414	35,508	298,776	0
	(ii)	0	0	0	0	0	0	0
6THOMAS HARTIGAN VP - ACCOUNT SERVICES	**(i)**	206,123	9,126	0	24,226	42,912	282,387	0
	(ii)	0	0	0	0	0	0	0
7JILL JOHNSON VP - PRODUCTS	**(i)**	210,403	10,920	0	23,306	29,337	273,966	0
	(ii)	0	0	0	0	0	0	0
8RICHARD GAZAWAY SR DIR - RGLTRY, OVRSGHT, MONITORING	**(i)**	205,276	7,500	0	22,343	30,201	265,320	0
	(ii)	0	0	0	0	0	0	0
9CHRIS STREAM VP - NPA NTWRK SRVCS (THRU 10/21)	**(i)**	210,403	0	0	23,519	24,334	258,256	0
	(ii)	0	0	0	0	0	0	0
10ANGELO GRIMA SVP AND GENERAL COUNSEL	**(i)**	195,466	10,000	0	7,330	10,913	223,709	0
	(ii)	0	0	0	0	0	0	0

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.

Return Reference	Explanation
PART I, LINE 1A	1. TAX INDEMNIFICATION/GROSS-UPS - THE ORGANIZATION DOES NOT HAVE A WRITTEN POLICY REQUIRING PAYMENT OR REIMBURSEMENT OF THESE BENEFITS; HOWEVER, IF THESE BENEFITS ARE PROVIDED, TERMS AND CONDITIONS ARE OUTLINED IN INDIVIDUAL EMPLOYEE AGREEMENTS. 2. HEALTH/SOCIAL CLUBS - THE ORGANIZATION DOES NOT REIMBURSE EXPENSES RELATED TO SOCIAL CLUB DUES. ALL EXPENSES FOR HEALTH OR FITNESS MUST BE DOCUMENTED AND APPROVED IN LINE WITH THE SOURCEAMERICA APPROVED POLICY PRIOR TO REIMBURSEMENT. A MAXIMUM REIMBURSEMENT OF $500.00 PER YEAR IS OFFERED TO ALL EMPLOYEES INCLUDING HIGHLY COMPENSATED IN ACCORDANCE WITH SOURCEAMERICA'S WELLNESS REIMBURSEMENT PROGRAM.
PART I, LINE 3	THE SOURCEAMERICA EXECUTIVE COMPENSATION COMMITTEE AND THE BOARD SETS AND APPROVES THE COMPENSATION OF THE CEO. THE CEO APPROVES THE COMPENSATION FOR ALL OTHER DISQUALIFIED PERSONS AS DEFINED BY IRS CODE, SECTION 4958 F(1). THIS SOURCEAMERICA EXECUTIVE COMPENSATION COMMITTEE OBTAINS COMPENSATION COMPARABILITY DATA FOR THE CEO AND THE OTHER DISQUALIFIED POSITIONS. THE COMPARABILITY DATA IS GENERALLY PROVIDED BY AN EXPERT IN COMPENSATION AND IS BASED ON INDUSTRY SURVEYS, DOCUMENTED COMPENSATION OF PERSONS HOLDING SIMILAR POSITIONS IN SIMILAR ORGANIZATIONS, EXPERT'S OWN COMPENSATION STUDIES, AND OTHER COMPARABLE DATA. THE EXECUTIVE COMPENSATION COMMITTEE REVIEWS ALL COMPENSATION OF DISQUALIFIED INDIVIDUALS TO ENSURE NO EXCESS BENEFIT HAS OCCURRED. THE COMMITTEE'S DELIBERATION AND FINAL VOTE EXCLUDES ANY PERSON(S) WHOSE COMPENSATION IS BEING APPROVED OR ANY OTHER BOARD MEMBER WITH A CONFLICT OF INTEREST. THE EXECUTIVE COMPENSATION COMMITTEE DOCUMENTS THE BASIS FOR ITS DETERMINATION WITH CONCURRENT APPROVAL FROM THE FULL BOARD OF DIRECTORS. THE ORGANIZATION'S DOCUMENTATION CONTAINS THE FOLLOWING: (1) THE TERMS OF THE APPROVED TRANSACTION AND THE DATE APPROVED; (2) THE MEMBERS OF THE EXECUTIVE COMPENSATION COMMITTEE WHO WERE PRESENT DURING THE DEBATE ON THE TRANSACTION THAT WAS APPROVED AND THOSE THAT VOTED ON IT; (3) THE COMPARABILITY DATA THAT WAS RELIED ON BY THE EXECUTIVE COMPENSATION COMMITTEE AND HOW THE DATA WAS OBTAINED, AND (4) ANY ACTIONS BY A MEMBER OF THE EXECUTIVE COMPENSATION COMMITTEE HAVING A CONFLICT OF INTEREST. ALL DOCUMENTATION MUST BE PREPARED BEFORE THE LATER OF THE NEXT MEETING OF THE EXECUTIVE COMPENSATION COMMITTEE OR 60 DAYS AFTER THE FINAL ACTIONS OF THE ORGANIZATION'S BOARD OF DIRECTORS. IN ADDITION, THE EXECUTIVE COMPENSATION COMMITTEE MUST APPROVE THE DOCUMENTATION BY THE NEXT BOARD MEETING.
PART I, LINE 7	THE BONUS AMOUNTS ARE DISCRETIONARY BASED ON PERFORMANCE TO BOARD APPROVED GOALS.

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SCHEDULE O
(Form 990)

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

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
SOURCEAMERICA

Employer identification number
52-1007153

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 4	THERE WERE A NUMBER OF REVISIONS MADE TO THE BYLAWS IN 2022, AND THEY GENERALLY FELL INTO FOUR CATEGORIES: (1) REVISIONS TO ACHIEVE FULL CONSISTENCY WITH COOPERATIVE AGREEMENT REQUIREMENTS RELATING TO BOARD COMPOSITION; (2) DELETION OF OUTDATED PROVISIONS (E.G., REQUIREMENTS OF THE BOARD TO DESIGNATE A PERSON TO SIGN AND COUNTERSIGN CHECKS, ADOPT A SEAL); (3) SIMPLIFICATION AND INTERNAL CONSISTENCY (E.G., MAKING THE MINIMUM NUMBER OF MEMBERS OF ALL STANDING COMMITTEES THREE; DELETING THE DUPLICATIVE DISSOLUTION PROVISION, SINCE DISSOLUTION IS ALREADY COVERED IN THE ARTICLES OF INCORPORATION); AND (4) BEST PRACTICES (E.G., CLARIFYING BOARD/MANAGEMENT RELATIONSHIP AS "CONTROL AND OVERSIGHT" AS OPPOSED TO "CONDUCTING" THE AFFAIRS OF THE ORGANIZATION).
FORM 990, PART VI, SECTION B, LINE 11B	THE 990 IS PROVIDED TO THE FULL SOURCEAMERICA BOARD GENERALLY 15 DAYS IN ADVANCE FOR REVIEW BEFORE IT IS EXECUTED BY THE ORGANIZATION'S CHIEF FINANCIAL OFFICER.
FORM 990, PART VI, SECTION B, LINE 12C	ALL MEMBERS OF THE BOARD OF DIRECTORS MUST FILE AN ANNUAL DISCLOSURE STATEMENT REVEALING ALL CONFLICTS OF INTEREST. THE SOURCEAMERICA BOARD OF DIRECTORS ADOPTED A CODE OF CONDUCT POLICY THAT ALL BOARD MEMBERS MUST ABIDE BY. ALL SOURCEAMERICA EMPLOYEES, BOARD MEMBERS AND OTHER TEAM MEMBERS MUST ABIDE BY THE CODE OF CONDUCT AND THE CONFLICT OF INTEREST POLICY AND MUST FILE A CONFLICT OF INTEREST DISCLOSURE STATEMENT FORM ON AN ANNUAL BASIS OR SOONER AS CONFLICTS ARISE. ALL NEW SOURCEAMERICA EMPLOYEES MUST FILE A CONFLICT OF INTEREST FORM UPON HIRE.
FORM 990, PART VI, SECTION B, LINE 15	THE SOURCEAMERICA EXECUTIVE COMPENSATION COMMITTEE AND THE BOARD SETS AND APPROVES THE COMPENSATION OF THE CEO. THE CEO APPROVES THE COMPENSATION FOR ALL OTHER DISQUALIFIED PERSONS AS DEFINED BY IRS CODE SECTION 4958 F(1). THE SOURCEAMERICA EXECUTIVE COMPENSATION COMMITTEE OBTAINS COMPENSATION COMPARABILITY DATA FOR THE CEO AND OTHER DISQUALIFIED POSITIONS. THE COMPARABILITY DATA IS GENERALLY PROVIDED BY AN EXPERT IN COMPENSATION AND IS BASED ON INDUSTRY SURVEYS, DOCUMENTED COMPENSATION OF PERSONS HOLDING SIMILAR POSITIONS IN SIMILAR ORGANIZATIONS, EXPERT'S OWN COMPENSATION STUDIES AND OTHER COMPARABLE DATA. THE EXECUTIVE COMPENSATION COMMITTEE REVIEWS ALL COMPENSATION OF DISQUALIFIED INDIVIDUALS TO ENSURE NO EXCESS BENEFIT HAS OCCURRED. THE COMMITTEE'S DELIBERATIONS AND FINAL VOTE EXCLUDES ANY PERSON(S) WHOSE COMPENSATION IS BEING APPROVED OR ANY OTHER BOARD MEMBER WITH A CONFLICT OF INTEREST. THE EXECUTIVE COMPENSATION COMMITTEE DOCUMENTS THE BASIS FOR ITS DETERMINATION WITH CONCURRENT APPROVAL FROM THE FULL BOARD OF DIRECTORS. THE ORGANIZATION'S DOCUMENTATION CONTAINS THE FOLLOWING: 1. THE TERMS OF THE APPROVED TRANSACTION AND THE DATE APPROVED, 2.THE MEMBERS OF THE EXECUTIVE COMPENSATION COMMITTEE WHO WERE PRESENT DURING THE DEBATE ON THE TRANSACTION THAT WAS APPROVED AND THOSE THAT VOTED ON IT, 3.THE COMPARABILITY DATA THAT WAS RELIED ON BY THE EXECUTIVE COMPENSATION COMMITTEE AND HOW THE DATA WAS OBTAINED AND 4. ANY ACTIONS BY A MEMBER OF THE EXECUTIVE COMPENSATION COMMITTEE HAVING A CONFLICT OF INTEREST. ALL DOCUMENTATION MUST BE PREPARED BEFORE THE LATER OF THE NEXT MEETING OF THE EXECUTIVE COMPENSATION COMMITTEE OR 60 DAYS AFTER THE FINAL ACTIONS OF THE ORGANIZATION'S BOARD OF DIRECTORS. IN ADDITION, THE EXECUTIVE COMPENSATION COMMITTEE MUST APPROVE THE DOCUMENTATION BY THE NEXT BOARD MEETING.
FORM 990, PART VI, SECTION C, LINE 19	THE AUDITED FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC ON REQUEST.

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