

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form **990**

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

2013

Department of the Treasury  
Internal Revenue Service

▶ Do not enter Social Security numbers on this form as it may be made public.  
▶ Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Open to Public Inspection

**A** For the 2013 calendar year, or tax year beginning **2013**, and ending **2013**, and ending **20**

|   |                                     |  |  |  |  |   |  |   |
|---|-------------------------------------|--|--|--|--|---|--|---|
| <b>B</b> Check if applicable  | <input checked="" type="checkbox"/> | Address change   | <b>C</b> Name of organization<br><b>GENERATIONS UNITED</b>   |  |  | <b>D</b> Employer identification number<br>31-1542973               |  |   |
|   | <input type="checkbox"/>            | Name change  |  |  |  | Doing Business As   |  |   |
|   | <input type="checkbox"/>            | Initial return   | Number and street (or P O box if mail is not delivered to street address) Room/suite<br>25 E STREET, NW, 3RD FLOOR   |  |  | <b>G</b> Gross receipts \$ 1,520,087.                               |  |   |
|   | <input type="checkbox"/>            | Terminated   | City or town, state or province, country, and ZIP or foreign postal code<br>WASHINGTON, DC 20001   |  |  |   |  |   |
| <input type="checkbox"/>  | Amended return                      | City or town, state or province, country, and ZIP or foreign postal code<br>WASHINGTON, DC 20001 |  |  | <b>F</b> Name and address of principal officer<br>DONNA BUTTS<br>SAME AS ABOVE |   |  |   |
| <input type="checkbox"/>  | Application pending                 | City or town, state or province, country, and ZIP or foreign postal code<br>WASHINGTON, DC 20001 |  |  |  |   |  | <b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no ) 4947(a)(1) or 527 |
| <b>J</b> Website: ▶ WWW.GU.ORG  |                                     |  | <b>K</b> Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶ |  |  | <b>L</b> Year of formation 1987 <b>M</b> State of legal domicile DC |  |   |
| <b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no ) 4947(a)(1) or 527 |                                     |  | <b>J</b> Website: ▶ WWW.GU.ORG   |  |  | <b>H(c)</b> Group exemption number ▶                                |  |   |

**Part I Summary**

|                                    |   |  |   |                    |                     |
|------------------------------------|---|--|---|--------------------|---------------------|
| <b>Activities &amp; Governance</b> | 1   | Briefly describe the organization's mission or most significant activities <u>TO IMPROVE THE LIVES OF CHILDREN, YOUTH AND OLDER PEOPLE THROUGH INTERGENERATIONAL COLLABORATION, PUBLIC POLICIES AND PROGRAMS FOR THE ENDURING BENEFIT FOR ALL.</u> |   |                    |                     |
|                                    | 2   | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets   |   |                    |                     |
|                                    | 3   | Number of voting members of the governing body (Part VI, line 1a)  | 3   | 15.                |                     |
|                                    | 4   | Number of independent voting members of the governing body (Part VI, line 1b)  | 4   | 15.                |                     |
|                                    | 5   | Total number of individuals employed in calendar year 2013 (Part V, line 2a)   | 5   | 13.                |                     |
|                                    | 6   | Total number of volunteers (estimate if necessary)   | 6   | 80.                |                     |
|                                    | 7a  | Total unrelated business revenue from Part VIII, column (C), line 12   | 7a  | 0                  |                     |
|                                    | 7b  | Net unrelated business taxable income from Form 990-T, line 34   | 7b  | 0                  |                     |
|                                    | <b>Revenue</b>  |  |   | <b>Prior Year</b>  | <b>Current Year</b> |
|                                    |   | 8  | Contributions and grants (Part VIII, line 1h) | 1,045,127.         | 1,421,892.          |
| 9                                  |   | Program service revenue (Part VIII, line 2g)   | 0   | 76,665.            |                     |
| 10                                 |   | Investment income (Part VIII, column (A), lines 3, 4, and 7d)  | 842.  | 87.                |                     |
| 11                                 |   | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)   | 18,403.                                       | 21,443.            |                     |
| 12                                 |   | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)   | 1,064,372.                                    | 1,520,087.         |                     |
| 13                                 |   | Grants and similar amounts paid (Part IX, column (A), lines 1-3)   | 1,000.  | 0                  |                     |
| 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)  | 638,081.                                      | 518,421.           |                     |
| 16a                                |   | Professional fundraising fees (Part IX, column (A), line 11e)  | 0   | 0                  |                     |
| <b>Expenses</b>                    |   |  |   |                    |                     |
|                                    | b   | Total fundraising expenses (Part IX, column (D), line 25)  | 534,983.                                      | 693,454.           |                     |
|                                    | 17  | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)   | 1,174,064.                                    | 1,211,875.         |                     |
|                                    | 18  | Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)   | -109,692.                                     | 308,212.           |                     |
|                                    | 19  | Revenue less expenses Subtract line 18 from line 12  | 555,923.                                      | 761,241.           |                     |
| <b>Net Assets or Fund Balances</b> |   |  | <b>Beginning of Current Year</b>              | <b>End of Year</b> |                     |
|                                    | 20  | Total assets (Part X, line 16)   | 244,336.                                      | 141,442.           |                     |
|                                    | 21  | Total liabilities (Part X, line 26)  | 311,587.                                      | 619,799.           |                     |
| 22                                 | Net assets or fund balances Subtract line 21 from line 20 |  |   |                    |                     |

**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.

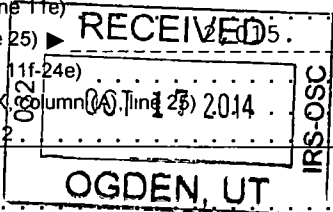
|                  |  |               |
|------------------|--|---------------|
| <b>Sign Here</b> | Signature of officer: <i>[Handwritten Signature]</i>             | Date: 9/25/14 |
|                  | Type or print name and title: Donna M. Butts, Executive Director |               |

|                               |   |  |                        |   |                 |
|-------------------------------|---|--|------------------------|---|-----------------|
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name: Michael J. Devlin, CPA                            | Preparer's signature: <i>[Handwritten Signature]</i> | Date: 9/24/14          | Check <input type="checkbox"/> if self-employed                               | PTIN: P00245532 |
|                               | Firm's name: SARFINO AND RHOADES, LLP   | Firm's EIN: 52-0961657                               |                        | Firm's address: 11921 ROCKVILLE PIKE, SUITE 501 NORTH BETHESDA, MD 20852-2794 |                 |
|                               | Firm's address: 11921 ROCKVILLE PIKE, SUITE 501 NORTH BETHESDA, MD 20852-2794 |  | Phone no: 301-770-5500 |   |                 |

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

For Paperwork Reduction Act Notice, see the separate instructions. Form **990** (2013)

SCANNED NOV 13 2014



Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission TO IMPROVE THE LIVES OF CHILDREN, YOUTH AND OLDER PEOPLE THROUGH INTERGENERATIONAL COLLABORATION, PUBLIC POLICIES, AND PROGRAMS FOR THE ENDURING BENEFIT FOR ALL.

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 [X] No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

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 \$ 233,400. including grants of \$ ) (Revenue \$ ) SHARED SITES: COMMITTED TO INCREASING INTERGENERATIONAL SHARED SITES AND SHARED RESOURCES TO MEET THE COUNTRY'S DEPENDENT CARE NEEDS AND ENCOURAGE AGE-INTEGRATED COMMUNITIES. THE PROGRAM ALSO SUPPORTS THE DEVELOPMENT OF YOUTH JUMPSTART GRANTS AND THE BEST INTERGENERATIONAL COMMUNITIES AWARDS. GU ALSO HOSTS THE NATIONAL RESOURCE CENTER ON INTERGENERATIONAL SHARED SITES.

4b (Code ) (Expenses \$ 247,364. including grants of \$ ) (Revenue \$ ) ATTACHMENT 1

4c (Code ) (Expenses \$ 229,114. including grants of \$ ) (Revenue \$ ) PUBLIC EDUCATION INCLUDING IDENTIFYING BEST INTERGENERATIONAL PRACTICES, PRODUCING REPORTS, SPEAKING AND WRITING, AND EDUCATING ABOUT GRANDPARENTS RAISING GRANDCHILDREN.

4d Other program services (Describe in Schedule O ) ATTACHMENT 2 (Expenses \$ 335,737. including grants of \$ ) (Revenue \$ )

4e Total program service expenses 1,045,615.

Part IV Checklist of Required Schedules

Table with 3 columns: Question number, Yes, No. Rows include questions 1 through 20b regarding organizational requirements and reporting.

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

|   | Yes | No |
|---|-----|----|
| 21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II . . . . .   | 21  | X  |
| 22 Did the organization report more than \$5,000 of grants or other assistance to individuals in the United States on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III . . . . .   | 22  | X  |
| 23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J . . . . .   | 23  | X  |
| 24 a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a. . . . .                          | 24a | X  |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .   | 24b |    |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .  | 24c |    |
| d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .   | 24d |    |
| 25 a <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I . . . . .   | 25a | X  |
| b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I . . . . .                                       | 25b | X  |
| 26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payable to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If so, complete Schedule L, Part II. . . . .                                     | 26  | X  |
| 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III. . . . . | 27  | X  |
| 28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)   |     |    |
| a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV. . . . .  | 28a | X  |
| b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV. . . . .   | 28b | X  |
| c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV. . . . .   | 28c | X  |
| 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M . . . . .   | 29  | X  |
| 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M . . . . .   | 30  | X  |
| 31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I. . . . .  | 31  | X  |
| 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II . . . . .   | 32  | X  |
| 33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I . . . . .   | 33  | X  |
| 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . . . .   | 34  | X  |
| 35 a Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .  | 35a | X  |
| b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2. . . . .  | 35b |    |
| 36 <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 . . . . .  | 36  | X  |
| 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI. . . . .   | 37  | X  |
| 38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .  | 38  | X  |

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

Table with columns for line numbers (1a-14b), Yes/No checkboxes, and numerical input fields. Contains questions about Form 1096, Form W-2G, Form W-3, Form 990-T, Form 8886-T, Form 8282, Form 8899, Form 1098-C, Form 4966, Form 4971, Form 720, and Form 1041.

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

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year; 1b Enter the number of voting members included in line 1a, above, who are independent; 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?; 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?; 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?; 5 Did the organization become aware during the year of a significant diversion of the organization's assets?; 6 Did the organization have members or stockholders?; 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?; 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?; 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body?; b Each committee with authority to act on behalf of the governing body?; 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.

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

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates?; 10b 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?; 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?; 11b Describe in Schedule O the process, if any, used by the organization to review this Form 990; 12a Did the organization have a written conflict of interest policy? If "No," go to line 13; 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?; 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done; 13 Did the organization have a written whistleblower policy?; 14 Did the organization have a written document retention and destruction policy?; 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?; 15a The organization's CEO, Executive Director, or top management official; 15b Other officers or key employees of the organization; 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?; 16b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. [ ] Own website [ ] Another's website [X] 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, physical address, and telephone number of the person who possesses the books and records of the organization

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

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

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

| (A)<br>Name and Title                      | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|--|--|-----------------------|---------|--------------|------------------------------|--------|--|---|---|
|  |  | Individual trustee or director   | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |  |   |   |
| (1) WILLIAM L. MINNIX, JR.<br>BOARD MEMBER | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (2) MICHAEL S. MARCUS<br>BOARD MEMBER      | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (3) MARYLEE ALLEN<br>BOARD MEMBER          | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (4) SHARON FINE<br>BOARD MEMBER            | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (5) JATRICE MARTEL GAITER<br>BOARD MEMBER  | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (6) MARLA VIORST<br>SECRETARY              | 1.00   | X  |                       | X       |              |                              |        | 0  | 0   | 0   |
| (7) WALTER L. JONES<br>VICE CHAIR          | 1.00   | X  |                       | X       |              |                              |        | 0  | 0   | 0   |
| (8) JAMES TAYLOR<br>BOARD MEMBER           | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (9) BARB QUAINANCE<br>BOARD MEMBER         | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (10) PAMELA B. SMITH<br>BOARD MEMBER       | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (11) MATTHEW MELMED<br>CHAIR               | 1.00   | X  |                       | X       |              |                              |        | 0  | 0   | 0   |
| (12) PAUL N. D. THORNELL<br>TREASURER      | 1.00   | X  |                       | X       |              |                              |        | 0  | 0   | 0   |
| (13) FRANCINE R. SALAMONE<br>BOARD MEMBER  | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |
| (14) MATTHEW D. CHASE<br>BOARD MEMBER      | 1.00   | X  |                       |         |              |                              |        | 0  | 0   | 0   |

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

| (A)<br>Name and title  | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |          | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|--|---|-----------------------|---------|--------------|------------------------------|----------|--|---|---|
|  |  | Individual trustee or director  | Institutional trustee | Officer | Key employee | Highest compensated employee | Former   |  |   |   |
| 15) SUSAN DREYFUS<br>BOARD MEMBER                              | 1.00   | X   |                       |         |              |                              | 0        | 0  | 0   |   |
| 16) DONNA BUTTS<br>EXECUTIVE DIRECTOR                          | 40.00  |   |                       | X       |              |                              | 120,722. | 0  | 12,389.   |   |
| <b>1b Sub-total</b>  |  |   |                       |         |              |                              | 0        | 0  | 0   |   |
| <b>c Total from continuation sheets to Part VII, Section A</b> |  |   |                       |         |              |                              | 120,722. | 0  | 12,389.   |   |
| <b>d Total (add lines 1b and 1c)</b>                           |  |   |                       |         |              |                              | 120,722. | 0  | 12,389.   |   |

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 **1**

- 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**  Yes  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  No
- 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**  Yes  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)<br>Name and business address | (B)<br>Description of services | (C)<br>Compensation |
|----------------------------------|--------------------------------|---------------------|
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **0**

**Part VIII Statement of Revenue**

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

|   |   |  | (A)<br>Total revenue | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from tax<br>under sections<br>512-514 |  |
|---|---|--|----------------------|--|---|--|--|
| <b>Contributions, Gifts, Grants and Other Similar Amounts</b> | <b>1a</b>   | Federated campaigns . . . . .  |                      |  |   |  |  |
|   | <b>1b</b>   | Membership dues . . . . .  | 92,375.              |  |   |  |  |
|   | <b>1c</b>   | Fundraising events . . . . .   |                      |  |   |  |  |
|   | <b>1d</b>   | Related organizations . . . . .  |                      |  |   |  |  |
|   | <b>1e</b>   | Government grants (contributions) . . . . .  |                      |  |   |  |  |
|   | <b>1f</b>   | All other contributions, gifts, grants,<br>and similar amounts not included above . . . . .  | 1,329,517.           |  |   |  |  |
|   | <b>g</b>  | Noncash contributions included in lines 1a-1f \$ . . . . .   |                      |  |   |  |  |
|   | <b>h</b>  | <b>Total.</b> Add lines 1a-1f . . . . .  |                      | 1,421,892.   |   |  |  |
| <b>Program Service Revenue</b>                                | <b>2a</b>   | CONFERENCE REVENUE   | 611430               | 76,665.  | 76,665.                                 |  |  |
|   | <b>b</b>  |  |                      |  |   |  |  |
|   | <b>c</b>  |  |                      |  |   |  |  |
|   | <b>d</b>  |  |                      |  |   |  |  |
|   | <b>e</b>  |  |                      |  |   |  |  |
|   | <b>f</b>  | All other program service revenue . . . . .  |                      |  |   |  |  |
|   | <b>g</b>  | <b>Total.</b> Add lines 2a-2f . . . . .  |                      | 76,665.  |   |  |  |
| <b>Other Revenue</b>  | <b>3</b>  | Investment income (including dividends, interest, and<br>other similar amounts) . . . . .  |                      | 87.  |   | 87.  |  |
|   | <b>4</b>  | Income from investment of tax-exempt bond proceeds . . . . .   |                      | 0  |   |  |  |
|   | <b>5</b>  | Royalties . . . . .  |                      | 0  |   |  |  |
|   | <b>6a</b>   | Gross rents . . . . .  | (i) Real             |  |   |  |  |
|   |   |  | (ii) Personal        |  |   |  |  |
|   | <b>b</b>  | Less rental expenses . . . . .   |                      |  |   |  |  |
|   | <b>c</b>  | Rental income or (loss) . . . . .  |                      |  |   |  |  |
|   | <b>d</b>  | Net rental income or (loss) . . . . .  |                      | 0  |   |  |  |
|   | <b>7a</b>   | Gross amount from sales of<br>assets other than inventory . . . . .  | (i) Securities       |  |   |  |  |
|   |   |  | (ii) Other           |  |   |  |  |
|   | <b>b</b>  | Less cost or other basis<br>and sales expenses . . . . .   |                      |  |   |  |  |
|   | <b>c</b>  | Gain or (loss) . . . . .   |                      |  |   |  |  |
|   | <b>d</b>  | Net gain or (loss) . . . . .   |                      | 0  |   |  |  |
|   | <b>8a</b>   | Gross income from fundraising<br>events (not including \$ _____<br>of contributions reported on line 1c)<br>See Part IV, line 18 . . . . . | <b>a</b>             |  |   |  |  |
|   | <b>b</b>  | Less direct expenses . . . . .   | <b>b</b>             |  |   |  |  |
| <b>c</b>  | Net income or (loss) from fundraising events . . . . .                |  |                      | 0  |   |  |  |
| <b>9a</b>   | Gross income from gaming activities<br>See Part IV, line 19 . . . . . | <b>a</b>   |                      |  |   |  |  |
| <b>b</b>  | Less direct expenses . . . . .  | <b>b</b>   |                      |  |   |  |  |
| <b>c</b>  | Net income or (loss) from gaming activities . . . . .                 |  |                      | 0  |   |  |  |
| <b>10a</b>  | Gross sales of inventory, less<br>returns and allowances . . . . .    | <b>a</b>   |                      |  |   |  |  |
| <b>b</b>  | Less cost of goods sold . . . . .                                     | <b>b</b>   |                      |  |   |  |  |
| <b>c</b>  | Net income or (loss) from sales of inventory . . . . .                |  |                      | 0  |   |  |  |
| Miscellaneous Revenue   |   |  | <b>Business Code</b> |  |   |  |  |
| <b>11a</b>  | SUBLEASE INCOME   | 900099   |                      | 11,250.  |   | 11,250.  |  |
| <b>b</b>  | MISCELLANEOUS INCOME  | 900099   |                      | 10,193.  | 10,193.                                 |  |  |
| <b>c</b>  |   |  |                      |  |   |  |  |
| <b>d</b>  | All other revenue . . . . .   |  |                      |  |   |  |  |
| <b>e</b>  | <b>Total.</b> Add lines 11a-11d . . . . .                             |  |                      | 21,443.  |   |  |  |
| <b>12</b>   | <b>Total revenue.</b> See instructions . . . . .                      |  |                      | 1,520,087.   | 86,858.                                 | 11,337.  |  |

**Part IX Statement of Functional Expenses**

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

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

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.  | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|---|-----------------------|---------------------------------|--|-----------------------------|
| 1 Grants and other assistance to governments and organizations in the United States See Part IV, line 21 . . . . .  | 0                     |                                 |  |                             |
| 2 Grants and other assistance to individuals in the United States See Part IV, line 22 . . . . .  | 0                     |                                 |  |                             |
| 3 Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16 . . . . .   | 0                     |                                 |  |                             |
| 4 Benefits paid to or for members . . . . .   | 0                     |                                 |  |                             |
| 5 Compensation of current officers, directors, trustees, and key employees . . . . .  | 120,722.              | 111,007.                        | 9,250.                                 | 465.                        |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .   | 0                     |                                 |  |                             |
| 7 Other salaries and wages . . . . .  | 318,259.              | 292,648.                        | 24,386.                                | 1,225.                      |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .  | 17,585.               | 16,162.                         | 1,351.                                 | 72.                         |
| 9 Other employee benefits . . . . .   | 28,609.               | 26,294.                         | 2,198.                                 | 117.                        |
| 10 Payroll taxes . . . . .  | 33,246.               | 30,556.                         | 2,554.                                 | 136.                        |
| 11 Fees for services (non-employees)  |                       |                                 |  |                             |
| a Management . . . . .  | 0                     |                                 |  |                             |
| b Legal . . . . .   | 0                     |                                 |  |                             |
| c Accounting . . . . .  | 29,730.               | 28,516.                         | 1,214.                                 |                             |
| d Lobbying . . . . .  | 0                     |                                 |  |                             |
| e Professional fundraising services See Part IV, line 17.   | 0                     |                                 |  |                             |
| f Investment management fees . . . . .  | 0                     |                                 |  |                             |
| 9 Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O) ATCH 3 . . . . .   | 238,024.              | 229,078.                        | 8,946.                                 |                             |
| 12 Advertising and promotion . . . . .  | 0                     |                                 |  |                             |
| 13 Office expenses . . . . .  | 5,362.                | 4,734.                          | 628.                                   |                             |
| 14 Information technology . . . . .   | 37,709.               | 36,169.                         | 1,540.                                 |                             |
| 15 Royalties . . . . .  | 0                     |                                 |  |                             |
| 16 Occupancy . . . . .  | 187,660.              |                                 | 187,660.                               |                             |
| 17 Travel . . . . .   | 47,351.               | 47,342.                         | 9.                                     |                             |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .   | 0                     |                                 |  |                             |
| 19 Conferences, conventions, and meetings . . . . .   | 102,326.              | 102,021.                        | 305.                                   |                             |
| 20 Interest . . . . .   | 0                     |                                 |  |                             |
| 21 Payments to affiliates . . . . .   | 0                     |                                 |  |                             |
| 22 Depreciation, depletion, and amortization . . . . .  | 1,944.                |                                 | 1,944.                                 |                             |
| 23 Insurance . . . . .  | 3,289.                |                                 | 3,289.                                 |                             |
| 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 GRANT OVERHEAD . . . . .  |                       | 87,999.                         | -87,999.                               |                             |
| b TELEPHONE . . . . .   | 6,191.                | 6,191.                          |  |                             |
| c EQUIPMENT AND MAINTENANCE . . . . .   | 5,741.                | 5,741.                          |  |                             |
| d PRINTING & PRODUCTION . . . . .   | 14,994.               | 14,994.                         |  |                             |
| e All other expenses . . . . .  | 13,133.               | 6,163.                          | 6,970.                                 |                             |
| 25 Total functional expenses. Add lines 1 through 24e . . . . .   | 1,211,875.            | 1,045,615.                      | 164,245.                               | 2,015.                      |
| 26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . . | 0                     |                                 |  |                             |

**Part X Balance Sheet**

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

|                             |  | (A)  |          | (B)         |          |        |
|-----------------------------|--|--|----------|-------------|----------|--------|
|                             |  | Beginning of year  |          | End of year |          |        |
| Assets                      | 1  | Cash - non-interest-bearing  | 55,703.  | 1           | 14,203.  |        |
|                             | 2  | Savings and temporary cash investments   | 443,895. | 2           | 553,156. |        |
|                             | 3  | Pledges and grants receivable, net   | 39,490.  | 3           | 160,584. |        |
|                             | 4  | Accounts receivable, net   | 0        | 4           | 3,100.   |        |
|                             | 5  | Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees<br>Complete Part II of Schedule L  | 0        | 5           | 0        |        |
|                             | 6  | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L | 0        | 6           | 0        |        |
|                             | 7  | Notes and loans receivable, net  | 0        | 7           | 0        |        |
|                             | 8  | Inventories for sale or use  | 0        | 8           | 0        |        |
|                             | 9  | Prepaid expenses and deferred charges  | 0        | 9           | 15,307.  |        |
|                             | 10a  | Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D  | 10a      | 10,525.     |          |        |
|                             | b  | Less accumulated depreciation  | 10b      | 8,690.      | 10c      | 1,835. |
|                             | 11   | Investments - publicly traded securities   | 0        | 11          | 0        |        |
|                             | 12   | Investments - other securities See Part IV, line 11  | 0        | 12          | 0        |        |
|                             | 13   | Investments - program-related See Part IV, line 11   | 0        | 13          | 0        |        |
|                             | 14   | Intangible assets  | 0        | 14          | 0        |        |
|                             | 15   | Other assets See Part IV, line 11  | 13,056.  | 15          | 13,056.  |        |
| 16                          | <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)   | 555,923.   | 16       | 761,241.    |          |        |
| Liabilities                 | 17   | Accounts payable and accrued expenses  | 105,854. | 17          | 85,880.  |        |
|                             | 18   | Grants payable   | 0        | 18          | 0        |        |
|                             | 19   | Deferred revenue   | 138,482. | 19          | 55,562.  |        |
|                             | 20   | Tax-exempt bond liabilities  | 0        | 20          | 0        |        |
|                             | 21   | Escrow or custodial account liability Complete Part IV of Schedule D   | 0        | 21          | 0        |        |
|                             | 22   | Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L  | 0        | 22          | 0        |        |
|                             | 23   | Secured mortgages and notes payable to unrelated third parties   | 0        | 23          | 0        |        |
|                             | 24   | Unsecured notes and loans payable to unrelated third parties   | 0        | 24          | 0        |        |
| 25                          | Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D | 0  | 25       | 0           |          |        |
| 26                          | <b>Total liabilities.</b> Add lines 17 through 25  | 244,336.   | 26       | 141,442.    |          |        |
| Net Assets or Fund Balances | <b>Organizations that follow SFAS 117 (ASC 958), check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29, and lines 33 and 34.</b>    |  |          |             |          |        |
|                             | 27   | Unrestricted net assets  | 196,154. | 27          | 205,835. |        |
|                             | 28   | Temporarily restricted net assets  | 115,433. | 28          | 413,964. |        |
|                             | 29   | Permanently restricted net assets  | 0        | 29          | 0        |        |
|                             | <b>Organizations that do not follow SFAS 117 (ASC 958), check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>                             |  |          |             |          |        |
|                             | 30   | Capital stock or trust principal, or current funds   |          | 30          |          |        |
|                             | 31   | Paid-in or capital surplus, or land, building, or equipment fund   |          | 31          |          |        |
|                             | 32   | Retained earnings, endowment, accumulated income, or other funds   |          | 32          |          |        |
| 33                          | <b>Total net assets or fund balances</b>   | 311,587.   | 33       | 619,799.    |          |        |
| 34                          | <b>Total liabilities and net assets/fund balances</b>  | 555,923.   | 34       | 761,241.    |          |        |

**Part XI Reconciliation of Net Assets**

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

|           |   |           |            |
|-----------|---|-----------|------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12)   | <b>1</b>  | 1,520,087. |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)  | <b>2</b>  | 1,211,875. |
| <b>3</b>  | Revenue less expenses Subtract line 2 from line 1   | <b>3</b>  | 308,212.   |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))                     | <b>4</b>  | 311,587.   |
| <b>5</b>  | Net unrealized gains (losses) on investments  | <b>5</b>  | 0          |
| <b>6</b>  | Donated services and use of facilities  | <b>6</b>  | 0          |
| <b>7</b>  | Investment expenses   | <b>7</b>  | 0          |
| <b>8</b>  | Prior period adjustments  | <b>8</b>  | 0          |
| <b>9</b>  | Other changes in net assets or fund balances (explain in Schedule O)  | <b>9</b>  | 0          |
| <b>10</b> | Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | <b>10</b> | 619,799.   |

**Part XII Financial Statements and Reporting**

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

- 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 in Schedule O
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .  
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? . . . . .  
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both  
 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? 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? . . . . .
- 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

|           | Yes | No |
|-----------|-----|----|
| <b>2a</b> |     | X  |
| <b>2b</b> | X   |    |
| <b>2c</b> | X   |    |
| <b>3a</b> |     | X  |
| <b>3b</b> |     |    |

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

**Public Charity Status and Public Support**

OMB No 1545-0047

**2013**

Open to Public Inspection

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

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 990 or Form 990-EZ.

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

Name of the organization

GENERATIONS UNITED

Employer identification number

31-1542973

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

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

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a  Type I    b  Type II    c  Type III-Functionally integrated    d  Type III-Non-functionally integrated
- e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
  - (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? 

|          |     |    |
|----------|-----|----|
|          | Yes | No |
| 11g(i)   |     |    |
| 11g(ii)  |     |    |
| 11g(iii) |     |    |
  - (ii) A family member of a person described in (i) above? .....
  - (iii) A 35% controlled entity of a person described in (i) or (ii) above? .....
- h Provide the following information about the supported organization(s)

| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1-9 above or IRC section (see instructions)) | (iv) Is the organization in col (i) listed in your governing document? |    | (v) Did you notify the organization in col (i) of your support? |    | (vi) Is the organization in col (i) organized in the U.S.? |    | (vii) Amount of monetary support |
|------------------------------------|----------|---|--|----|---|----|--|----|----------------------------------|
|                                    |          |   | Yes  | No | Yes   | No | Yes  | No |                                  |
| (A)                                |          |   |  |    |   |    |  |    |                                  |
| (B)                                |          |   |  |    |   |    |  |    |                                  |
| (C)                                |          |   |  |    |   |    |  |    |                                  |
| (D)                                |          |   |  |    |   |    |  |    |                                  |
| (E)                                |          |   |  |    |   |    |  |    |                                  |
| <b>Total</b>                       |          |   |  |    |   |    |  |    |                                  |

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

Schedule A (Form 990 or 990-EZ) 2013

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

**Section A. Public Support**

| Calendar year (or fiscal year beginning in) ▶  | (a) 2009   | (b) 2010   | (c) 2011   | (d) 2012   | (e) 2013   | (f) Total  |
|--|------------|------------|------------|------------|------------|------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants") . . . . .  | 1,021,011. | 1,223,891. | 1,174,169. | 1,045,127. | 1,421,892. | 5,886,090. |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .   |            |            |            |            |            | 0          |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .   |            |            |            |            |            | 0          |
| <b>4 Total.</b> Add lines 1 through 3 . . . . .  | 1,021,011. | 1,223,891. | 1,174,169. | 1,045,127. | 1,421,892. | 5,886,090. |
| <b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . . |            |            |            |            |            | 3,319,859. |
| <b>6 Public support.</b> Subtract line 5 from line 4 . . . . .   |            |            |            |            |            | 2,566,231. |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ▶   | (a) 2009   | (b) 2010   | (c) 2011   | (d) 2012   | (e) 2013   | (f) Total  |
|---|------------|------------|------------|------------|------------|------------|
| <b>7</b> Amounts from line 4 . . . . .  | 1,021,011. | 1,223,891. | 1,174,169. | 1,045,127. | 1,421,892. | 5,886,090. |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .   | 10,675.    | 10,000.    | 9,266.     | 1,970.     | 87.        | 31,998.    |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .   |            |            |            |            |            | 0          |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) . . . . .  |            |            |            |            | 10,193.    | 10,193.    |
| <b>11 Total support.</b> Add lines 7 through 10 . . . . .   |            |            |            |            |            | 5,928,281. |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .   |            |            |            |            | 12         | 365,476.   |
| <b>13 First five years.</b> 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 <b>stop here</b> . . . . . <input type="checkbox"/> |            |            |            |            |            |            |

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

|   |           |        |
|---|-----------|--------|
| <b>14</b> Public support percentage for 2013 (line 6, column (f) divided by line 11, column (f)) . . . . .  | <b>14</b> | 43.29% |
| <b>15</b> Public support percentage from 2012 Schedule A, Part II, line 14 . . . . .  | <b>15</b> | 40.77% |
| <b>16a 33 1/3% support test - 2013.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . <input checked="" type="checkbox"/>  |           |        |
| <b>b 33 1/3% support test - 2012.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>  |           |        |
| <b>17a 10%-facts-and-circumstances test - 2013.</b> 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 <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>    |           |        |
| <b>b 10%-facts-and-circumstances test - 2012.</b> 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 <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/> |           |        |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . <input type="checkbox"/>   |           |        |

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

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Table with 7 columns: (a) 2009, (b) 2010, (c) 2011, (d) 2012, (e) 2013, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 7c Add lines 7a and 7b; 8 Public support.

Section B. Total Support

Table with 7 columns: (a) 2009, (b) 2010, (c) 2011, (d) 2012, (e) 2013, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 10c Add lines 10a and 10b; 11 Net income from unrelated business activities not included in line 10b; 12 Other income Do not include gain or loss from the sale of capital assets; 13 Total support.

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

Section C. Computation of Public Support Percentage

Table with 2 columns: Line number, Percentage. Row 15: Public support percentage for 2013 (line 8, column (f) divided by line 13, column (f)). Row 16: Public support percentage from 2012 Schedule A, Part III, line 15.

Section D. Computation of Investment Income Percentage

Table with 2 columns: Line number, Percentage. Row 17: Investment income percentage for 2013 (line 10c, column (f) divided by line 13, column (f)). Row 18: Investment income percentage from 2012 Schedule A, Part III, line 17.

19a 33 1/3% support tests - 2013. 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 - 2012. 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.

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**Part IV** **Supplemental Information.** Provide the explanations required by Part II, line 10, Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

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

**Political Campaign and Lobbying Activities**

OMB No 1545-0047

**2013**

**Open to Public Inspection**

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

Department of the Treasury  
Internal Revenue Service

**If the organization answered "Yes," to 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," to 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," to Form 990, Part IV, line 5 (Proxy Tax) or Form 990-EZ, Part V, line 35c (Proxy Tax), then**

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

|   |   |
|---|---|
| Name of organization<br><b>GENERATIONS UNITED</b> | Employer identification number<br><b>31-1542973</b> |
|---|---|

**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
- 2 Political expenditures . . . . . ▶ \$ \_\_\_\_\_
- 3 Volunteer hours . . . . . \_\_\_\_\_

**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)      | -----       |         |   |  |

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule C (Form 990 or 990-EZ) 2013

**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<br>(The term "expenditures" means amounts paid or incurred.)   |   | (a) Filing organization's totals                | (b) Affiliated group totals                              |                    |                              |   |   |   |   |  |  |                   |             |  |  |
|--|---|---|--|--------------------|------------------------------|---|---|---|---|--|--|-------------------|-------------|--|--|
| <b>1a</b>  | Total lobbying expenditures to influence public opinion (grass roots lobbying) . . . . .  |   |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>b</b>   | Total lobbying expenditures to influence a legislative body (direct lobbying) . . . . .   | 1,040.  |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>c</b>   | Total lobbying expenditures (add lines 1a and 1b) . . . . .   | 1,040.  |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>d</b>   | Other exempt purpose expenditures . . . . .   | 1,210,835.                                      |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>e</b>   | Total exempt purpose expenditures (add lines 1c and 1d) . . . . .   | 1,211,875.                                      |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>f</b>   | Lobbying nontaxable amount Enter the amount from the following table in both columns  | 196,188.  |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <table border="1"> <thead> <tr> <th>If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000</td> </tr> </tbody> </table> |   | 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 |  |  |
| 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   |   |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>g</b>   | Grassroots nontaxable amount (enter 25% of line 1f) . . . . .   | 49,047.   |  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>h</b>   | Subtract line 1g from line 1a If zero or less, enter -0- . . . . .  | 0   | 0  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>i</b>   | Subtract line 1f from line 1c If zero or less, enter -0- . . . . .  | 0   | 0  |                    |                              |   |   |   |   |  |  |                   |             |  |  |
| <b>j</b>   | 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? . . . . . |   | <input type="checkbox"/> Yes <input type="checkbox"/> 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 instructions for lines 2a through 2f on page 4.)

| Lobbying Expenditures During 4-Year Averaging Period             |          |          |          |          |            |
|--|----------|----------|----------|----------|------------|
| Calendar year (or fiscal year beginning in)                      | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) Total  |
| <b>2a</b> Lobbying nontaxable amount                             | 201,483. | 206,544. | 192,406. | 196,188. | 796,621.   |
| <b>b</b> Lobbying ceiling amount (150% of line 2a, column (e))   |          |          |          |          | 1,194,932. |
| <b>c</b> Total lobbying expenditures                             | 1,917.   | 3,450.   | 678.     | 1,040.   | 7,085.     |
| <b>d</b> Grassroots nontaxable amount                            | 50,371.  | 51,636.  | 48,102.  | 49,047.  | 199,156.   |
| <b>e</b> Grassroots ceiling amount (150% of line 2d, column (e)) |          |          |          |          | 298,734.   |
| <b>f</b> Grassroots lobbying expenditures                        | 74.      | 2,022.   |          |          | 2,096.     |

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)).

Table with 3 main columns: (a) Yes/No, (b) Amount. Rows include: 1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation... a Volunteers? b Paid staff or management... c Media advertisements? d Mailings to members... e Publications... f Grants to other organizations... g Direct contact with legislators... h Rallies, demonstrations... 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).

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

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."

Table with 2 columns: Question, Amount. Rows include: 1 Dues, assessments and similar amounts from members 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 b Carryover from last year c Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues 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? 5 Taxable amount of lobbying and political expenditures (see instructions)

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, line 2, and Part II-B, line 1 Also, complete this part for any additional information

Series of horizontal dashed lines for providing supplemental information.

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**Part IV** Supplemental Information *(continued)*

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SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2013

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Attach to Form 990.

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

Name of the organization

GENERATIONS UNITED

Employer identification number

31-1542973

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include: 1 Total number at end of year, 2 Aggregate contributions to (during year), 3 Aggregate grants from (during year), 4 Aggregate value at end of year, 5 Did the organization inform all donors... Yes No, 6 Did the organization inform all grantees... Yes No

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

Table with 2 columns: Held at the End of the Tax Year. Rows include: 1 Purpose(s) of conservation easements held by the organization (check all that apply), 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution... 2a Total number of conservation easements, 2b Total acreage restricted by conservation easements, 2c Number of conservation easements on a certified historic structure included in (a), 2d Number of conservation easements included in (c) acquired after 8/17/06... 3 Number of conservation easements modified, transferred, released, extinguished, or terminated... 4 Number of states where property subject to conservation easement is located... 5 Does the organization have a written policy regarding the periodic monitoring... Yes No, 6 Staff and volunteer hours devoted to monitoring... 7 Amount of expenses incurred in monitoring... \$, 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...

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8

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

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Schedule D (Form 990) 2013

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

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

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

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?
b If "Yes," explain the arrangement in Part XIII and complete the following table
c Beginning balance
d Additions during the year
e Distributions during the year
f Ending balance
2a Did the organization include an amount on Form 990, Part X, line 21?
b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII.

Table with 2 columns: Description, Amount. Rows: 1c Beginning balance, 1d Additions during the year, 1e Distributions during the year, 1f Ending balance.

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

Table with 6 columns: (a) Current year, (b) Prior year, (c) Two years back, (d) Three years back, (e) Four years back. Rows: 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 Temporarily restricted endowment %
The percentages in lines 2a, 2b, and 2c should equal 100%
3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
(i) unrelated organizations
(ii) related organizations
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?
4 Describe in Part XIII the intended uses of the organization's endowment funds

Table with 2 columns: Yes, No. Rows: 3a(i), 3a(ii), 3b.

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

Table with 5 columns: Description of property, (a) Cost or other basis (investment), (b) Cost or other basis (other), (c) Accumulated depreciation, (d) Book value. Rows: 1a Land, b Buildings, c Leasehold improvements, d Equipment, e Other, Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c)).

**Part VII Investments - Other Securities.**

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

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

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

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

**Part X Other Liabilities.**

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

| 1. (a) Description of liability   | (b) Book value |
|---|----------------|
| (1) Federal income taxes  |                |
| (2)   |                |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 25) ▶ |                |

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 XIII** Supplemental Information *(continued)*

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

Department of the Treasury  
Internal Revenue Service

Name of the organization

GENERATIONS UNITED

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

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

OMB No 1545-0047

**2013**

**Open to Public  
Inspection**

Employer identification number

31-1542973

FORM 990, PART VI, SECTION B, LINE 11A

UPON PREPARATION BY AN INDEPENDENT CPA, THE 990 FORM IS REVIEWED BY THE EXECUTIVE DIRECTOR. THE 990 FORM IS SUBSEQUENTLY DISTRIBUTED TO ONE OR MORE OFFICERS, AND THEN TO THE BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION B, LINE 15A

THE EXECUTIVE COMMITTEE AND CHAIRPERSON OF THE BOARD OF DIRECTORS REVIEW THE EXECUTIVE DIRECTOR'S PERFORMANCE ANNUALLY AND DETERMINE COMPENSATION BASED ON FINANCIAL AND PROGRAMMATIC PERFORMANCE OF THE ORGANIZATION.

FORM 990, PART VI, SECTION C, LINE 19

THE ORGANIZATION CONSIDERS ALL REQUESTS FROM THE PUBLIC FOR DOCUMENTS, INCLUDING THOSE DOCUMENTS NOT REQUIRED TO BE MADE PUBLIC.

CONFLICT OF INTEREST POLICY

GU EXPECTS EVERY EMPLOYEE TO ACT IN ACCORDANCE WITH THE HIGHEST STANDARDS OF ETHICAL AND PROFESSIONAL CONDUCT IN WORK-RELATED MATTERS, TO MAINTAIN THE CONFIDENTIALITY OF ALL PROPRIETARY INFORMATION OF GU, AND TO AVOID ACTIVITIES THAT MIGHT CONFLICT, OR MIGHT APPEAR TO CONFLICT, WITH THE INTERESTS OF GU.

OUTSIDE ACTIVITIES/OUTSIDE EMPLOYMENT. EMPLOYEES MUST RECEIVE WRITTEN ADVANCE APPROVAL FROM THEIR SUPERVISOR IF THEY WISH TO ENGAGE IN OUTSIDE ACTIVITIES THAT ARE THE SAME OR SIMILAR TO THEIR WORK AT GU, WHETHER FOR ANOTHER ORGANIZATION OR AS SELF-EMPLOYMENT, AND WHETHER PAID OR PERFORMED

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ON A VOLUNTEER BASIS.

OUTSIDE INVOLVEMENT. EMPLOYEES WHO HAVE ANY FINANCIAL OR PERSONAL INTEREST IN AN ORGANIZATION WHICH MAY DO BUSINESS WITH OR COMPETE AGAINST GU MUST DISCLOSE, IN WRITING, THE NATURE OF SUCH FINANCIAL OR PERSONAL INTEREST TO THEIR SUPERVISOR OR THE EXECUTIVE DIRECTOR.

GRATUITIES. EMPLOYEES OF GU ARE NOT PERMITTED TO ACCEPT FROM OR TO GIVE TO ANY PERSON OR ORGANIZATION THAT DOES BUSINESS OR MAY SEEK TO DO BUSINESS WITH GU ANY GIFTS, ENTERTAINMENT OR FAVORS THAT COULD INFLUENCE OR APPEAR TO INFLUENCE A BUSINESS DECISION.

ANY ACTION CONTRARY TO THIS POLICY MAY RESULT IN IMMEDIATE TERMINATION OF AN EMPLOYEE. FURTHER, PARTICIPATION IN CERTAIN OUTSIDE ACTIVITIES MAY BE VIEWED AS BEING IN CONFLICT WITH THE INTERESTS OF GU AND MAY LEAD TO TERMINATION IN APPROPRIATE CIRCUMSTANCES.

ANY ACTION CONTRARY TO THIS POLICY MAY RESULT IN IMMEDIATE TERMINATION OF AN EMPLOYEE. FURTHER, PARTICIPATION IN CERTAIN OUTSIDE ACTIVITIES MAY BE VIEWED AS BEING IN CONFLICT WITH THE INTERESTS OF GU AND MAY LEAD TO TERMINATION IN APPROPRIATE CIRCUMSTANCES.

OFFICERS, DIRECTORS OR TRUSTEES, AND KEY EMPLOYEES ARE REQUIRED TO ANNUALLY DESCRIBE THEIR CONFLICT OF INTEREST AND SIGN A FORM.

ATTACHMENT 1

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

GRANDFAMILIES: GENERATIONS UNITED'S NATIONAL CENTER ON GRANDFAMILIES WORKS TO PROMOTE POLICIES AND PROGRAMS TO HELP GRANDFAMILIES ADDRESS THE RANGE OF CHALLENGES THEY FACE INCLUDING THOSE RELATED TO HOUSING, LEGAL, EDUCATION, HEALTH AND MENTAL HEALTH, FAMILY RELATIONSHIPS, AND FINANCIAL ISSUES. GU LEADS AN ADVISORY GROUP OF ORGANIZATIONS THAT SET THE AGENDA TO ADVANCE

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ATTACHMENT 1 (CONT'D)

PUBLIC WILL IN SUPPORT OF THESE FAMILIES. GU'S RESOURCES FOR GRANDFAMILIES INCLUDE THE GRANDFAMILIES STATE LAW AND POLICY RESOURCE CENTER (WWW.GRANDFAMILIES.ORG), CREATED AND MAINTAINED IN PARTNERSHIP WITH THE AMERICAN BAR ASSOCIATION, AND WWW.GRANDFACTSHEETS.ORG, MAINTAINED WITH SEVERAL NATIONAL PARTNERS. GU'S EDUCATION AND AWARENESS RAISING ACTIVITIES HELPED LEAD TO THE INCLUSION OF GRANDFAMILIES IN THE NATIONAL FAMILY CAREGIVER SUPPORT ACT AND THE PASSAGE OF LEGACY, THE FIRST LEGISLATION SUPPORTING AFFORDABLE HOUSING FOR GRANDFAMILIES. GU ALSO TRAINS GRANDFAMILIES TO ADVOCATE FOR THEMSELVES. FOUR SUCCESSFUL NATIONAL GRANDRALLIES AT THE CAPITOL MOBILIZED MORE THAN 1,000 GRANDPARENTS AT EACH RALLY TO TAKE THEIR CONCERNS TO ELECTED OFFICIALS.

ATTACHMENT 2FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES

| <u>DESCRIPTION</u>                       | <u>GRANTS</u> | <u>EXPENSES</u> | <u>REVENUE</u> |
|--|---------------|-----------------|----------------|
| HIGH QUALITY PRE-KINDERGARTEN FOR ALL    |               | 65,161.         |                |
| MEMBERSHIP                               |               | 42,671.         |                |
| GRANDPARENT'S INVESTING IN GRANDCHILDREN |               | 10,842.         |                |
| VOLUNTEER ENGAGEMENT INITIATIVE          |               | 33,163.         |                |
| YOUTH JUMPSTART                          |               | 71,282.         |                |
| CONFERENCE                               |               | 112,618.        |                |
| TOTALS                                   |               | <u>335,737.</u> |                |

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ATTACHMENT 3FORM 990, PART IX - OTHER FEES

| <u>DESCRIPTION</u> | (A)<br><u>TOTAL<br/>FEES</u> | (B)<br><u>PROGRAM<br/>SERVICE EXP.</u> | (C)<br><u>MANAGEMENT<br/>AND GENERAL</u> | (D)<br><u>FUNDRAISING<br/>EXPENSES</u> |
|--------------------|------------------------------|--|--|--|
| CONSULTANTS        | 209,524.                     | 200,966.                               | 8,558.                                   |  |
| HONORARIUMS        | 9,500.                       | 9,112.                                 | 388.                                     |  |
| SUBCONTRACTORS     | 19,000.                      | 19,000.                                |  |  |
| TOTALS             | <u>238,024.</u>              | <u>229,078.</u>                        | <u>8,946.</u>                            |  |

ATTACHMENT 4FORM 990, PART X - DEFERRED REVENUE

| <u>DESCRIPTION</u> | <u>BEGINNING<br/>BOOK VALUE</u> | <u>ENDING<br/>BOOK VALUE</u> |
|--------------------|---------------------------------|------------------------------|
| DEFERRED REVENUE   | 138,482.                        | 55,562.                      |
| TOTALS             | <u>138,482.</u>                 | <u>55,562.</u>               |

# Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**  
▶ Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).

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

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

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

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

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

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Enter filer's identifying number, see instructions

|  |   |  |
|--|---|--|
| <b>Type or print</b>   | Name of exempt organization or other filer, see instructions.<br><b>GENERATIONS UNITED</b>                              | Employer identification number (EIN) or<br><b>31-1542973</b> |
| File by the due date for filing your return. See instructions. | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>1331 H STREET, NW</b>                      | Social security number (SSN)                                 |
|  | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>WASHINGTON, DC 20005</b> |  |

Enter the Return code for the return that this application is for (file a separate application for each return)  0  1

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

• The books are in the care of ▶ BOOKKEEPER

Telephone No. ▶ 202 289-3979 FAX No. ▶ \_\_\_\_\_

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15, 2014, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ▶  calendar year 2013 or  
 ▶  tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_.

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

|   |           |             |
|---|-----------|-------------|
| 3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                   | <b>3a</b> | \$ <b>0</b> |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | <b>3b</b> | \$ <b>0</b> |
| c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.      | <b>3c</b> | \$ <b>0</b> |

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

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box. . . . .  X
- Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

|   |  |   |
|---|--|---|
| <b>Type or print</b><br><br>File by the due date for filing your return. See instructions | Enter filer's identifying number, see instructions                     |   |
|   | Name of exempt organization or other filer, see instructions.          | Employer identification number (EIN) or |
|   | GENERATIONS UNITED   | 31-1542973                              |
|   | Number, street, and room or suite no. If a P.O. box, see instructions. | Social security number (SSN)            |
| 1331 H STREET, NW   |  |   |
| City, town or post office, state, and ZIP code For a foreign address, see instructions    |  |   |
| WASHINGTON, DC 20005  |  |   |

Enter the Return code for the return that this application is for (file a separate application for each return) . . . . . **011**

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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of **BOOKKEEPER**  
Telephone No. **202 289-3979** Fax No. \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box  . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.
- 4 I request an additional 3-month extension of time until 11/17, 2014.
- 5 For calendar year 2013, or other tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_.
- 6 If the tax year entered in line 5 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period
- 7 State in detail why you need the extension **ADDITIONAL TIME IS REQUIRED IN ORDER TO FILE A COMPLETE AND ACCURATE RETURN.**

|  |       |   |
|--|-------|---|
| 8a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.   | 8a \$ | 0 |
| b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. | 8b \$ | 0 |
| c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.   | 8c \$ | 0 |

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **Pym Mills** Title **CPTA** Date **8/12/2014**