Form 990 Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2022

Open to Public Inspection

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

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

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

Department of the Treasury
Internal Revenue Service

A For the 2022 calendar year, or tax year beginning 01-01-2022 , and ending 12-31-2022

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

C Name of organization
AARP Foundation

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) | Room/suite
601 E Street NW Tax Dept

City or town, state or province, country, and ZIP or foreign postal code
Washington, DC 20049

D Employer identification number
52-0794300

E Telephone number
(202) 434-3399

G Gross receipts $ 662,915,038

F Name and address of principal officer:
Claire Casey
601 E Street NW Tax Dept
Washington, DC 20049

H(a) Is this a group return for subordinates? ☐ Yes ☑ No

H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list. See instructions.

H(c) Group exemption number ▶

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

J Website: ▶ www.aarp.org/foundation

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

L Year of formation: 1961

M State of legal domicile: DC

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities:
AARP Foundation is tackling senior poverty by sparking bold, innovative solutions that help vulnerable older adults build economic opportunity and social connection.

2 Check this box ▶☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3	Number of voting members of the governing body (Part VI, line 1a)	3	9
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	9
5	Total number of individuals employed in calendar year 2022 (Part V, line 2a)	5	389
6	Total number of volunteers (estimate if necessary)	6	27,047
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	317,726
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	37,784

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	161,205,196	169,881,942
	9	Program service revenue (Part VIII, line 2g)	2,065,479	822,571
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	90,351,797	26,443,502
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	540,627	6,068,951
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	254,163,099	203,216,966
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	73,303,697	83,240,788
	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)	43,610,564	42,446,270
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	1,841,697	1,832,265
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶23,248,196		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	62,828,201	67,885,886
	18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	181,584,159	195,405,209
	19	Revenue less expenses. Subtract line 18 from line 12	72,578,940	7,811,757

			Beginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	703,184,035	662,653,314
	21	Total liabilities (Part X, line 26)	55,117,407	60,234,067
	22	Net assets or fund balances. Subtract line 21 from line 20	648,066,628	602,419,247

Part II Signature Block

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

Sign Here

Signature of officer | Date 2023-11-02

Claire Casey President
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no.	

May the IRS discuss this return with the preparer shown above? See Instructions. ☐ Yes ☐ No

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

AARP Foundation is tackling senior poverty by sparking bold, innovative solutions that help vulnerable older adults build economic opportunity and social connection.AARP Foundation works to end senior poverty and reduce financial hardship. AARP Foundation is creating and advancing the most effective solutions to help older adults living with low income secure the essentials. AARP Foundation develops, implements, and supports programs both directly and in collaboration with key partners nationwide. The focus of the Foundation's work is addressing poverty among older adults by increasing income through earnings and access to critical benefits and services; and decreasing expenditures for major cost-of-living expenses such as housing, food, and health care.

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

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

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

If "Yes," describe these changes on Schedule O.

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

4a (Code:) (Expenses $ 94,283,856 including grants of $ 69,132,365) (Revenue $ 0)

Workforce ProgramsSenior Community Service Employment Program:Funded by a grant from the U.S. Department of Labor, the AARP Foundation Senior Community Service Employment Program (SCSEP) has operated for over 50 years and is the oldest and largest older worker program in the country. SCSEP organizes training assignments that help participants build job skills while giving back to their community. The training assignments are with nonprofit and public facilities like day care centers, senior centers, schools, and hospitals, where SCSEP participants train an average of 20 hours a week in a variety of community service positions. With on-the-job training experience and updated skills, participants improve their ability to find permanent employment. In order to be eligible for SCSEP, participants must be 55 or older, unemployed, and have an income not more than 125% of the established federal poverty guidelines. AARP Foundation SCSEP serves more than 12,000 people annually in 90 municipalities, 19 states, and Puerto Rico. At least 75% of SCSEP participants retain employment nine months after taking part in the program and has placed participants with more than 9,000 employers in the last three years. www.aarpfoundation.org/scsepBack to Work 50+: Since 2013, BACK TO WORK 50+ (BTW50+) has served unemployed jobseekers 50 and older with a suite of tools and coaching resources to help them compete with confidence for today's in-demand jobs. Foundational to its success is a nationwide network of community partners who implement program components in their local communities. Trained career transition coaches host in-person and online coaching programs that provide a job search guide and workbook, group and individual sessions, connections to skills training, and access to employers. The program is available nationally through webinars hosted by AARP Foundation coaches, and in eight states through 14 nonprofit organizations and community colleges. www.aarpfoundation.org/backtoworkWork for Yourself@50+: Through nationwide partners, the Work for Yourself@50+ (WFY@50+) program makes it easy for people over 50 to explore self-employment options, with free tools and resources that can help them increase their financial stability. A series of workshops and a toolkit guide participants through five simple steps while providing coaching and peer support. An online Freelancing Resource Center provides additional support and advice. The Work for Yourself@50+ Incubator Program, powered by Bridge for Billions, helps older adults with low-income launch and develop successful businesses through an online platform, virtual mentorship, and coaching sessions. WFY@50+ has served more than 52,000 older adults since it launched in 2016, and AARP Foundation collaborates with more than 21 organizations across 16 states and Washington, D.C., to implement the program. www.workforyourself.aarpfoundation.orgDigital Skills Ready@50+The Digital Skills Ready@50+ initiative, made possible through a $10 million grant from Google.org through the TIDES Foundation, was created to meet a pressing need: digital skills training for people over 50 who are living with low income, with a particular focus on women and people of color. The trainings help to increase older adults' economic security and social connections through a curriculum focused on basic digital skills to help them find and secure jobs, change careers, or explore entrepreneurship. The program is currently rolling out across eight states.

4b (Code:) (Expenses $ 19,129,684 including grants of $ 735,000) (Revenue $ 17,590)

Tax and Credit ProgramsTax-Aide:AARP Foundation Tax-Aide provides in-person and virtual tax preparation help to anyone, free of charge, with a focus on taxpayers who are over 50 and have low to moderate income. Tax-Aide is the largest free, volunteer-based tax assistance and preparation program in the U.S. with over 25,000 volunteers nationwide. Tax-Aide volunteers are trained and IRS-certified every year to make sure they know about and understand the latest changes and additions to the tax code. www.aarpfoundation.org/taxaideProperty Tax-Aide:AARP Foundation Property Tax-Aide helps older adults with low income take advantage of property tax refund and credit programs, saving them money and helping them stay in their homes longer. Property Tax-Aide uses an innovative online fintech tool to simplify the process of applying for property tax refunds and credits. Trained program volunteers use an eligibility screener to determine eligibility for a property tax refund or credit. The volunteers then use an application wizard to help eligible older adults complete the appropriate forms and prepare them for filing. Assistance is available both in person and online. We currently serve 12 states and the District of Columbia and plan to expand nationwide to all states offering property tax relief.

4c (Code:) (Expenses $ 8,746,698 including grants of $ 6,426,399) (Revenue $ 0)

Benefits ProgramsSupplemental Nutrition Assistance Program (SNAP) Application Assistance:AARP Foundation is helping to increase enrollment in the SNAP for eligible older adults so they can receive and use SNAP benefits to buy healthy food - affordably. This includes support of ESAP, the Elderly Simplified Application Process. Through grantmaking, AARP Foundation supports nonprofit community organizations in 10 states that received waivers from the USDA to enact the Elderly Simplified Application Project (ESAP). ESAP streamlines the application process, making it easier for people who are over 60 and have no earned income to receive SNAP benefits. The community organizations use these grants to field more calls and sign up more seniors for SNAP. AARP Foundation also helps additional states apply for ESAP waivers so the program can reach more older adults across the country and support program implementation once the waiver is granted.Earned Income Tax Credit:AARP Foundation is helping eligible older adults take advantage of the Earned Income Tax Credit (EITC), a refundable credit that supplements incomes for workers earning low wages. Through the Tax-Aide program, AARP Foundation is providing taxpayers in over 3,000 communities with free tax preparation and filing services, ensuring that eligible older adults claim the Earned Income Tax Credit when they file. AARP Foundation is also focused on efforts to raise awareness of the EITC among eligible older adults, launching grants and marketing in 2022 to raise awareness and support temporary EITC eligibility expansion. Medicare Savings Program:State Medicare Savings Programs (MSP) can help pay premiums, deductibles, coinsurance, copayments, and prescription drug coverage costs but many older adults don't know they exist, and the process can be confusing. AARP Foundation is focused on reaching older adults with low income who are eligible for MSP but are not enrolled to help them apply for this valuable assistance.Student Loan Repayment Tool:Older adults are the fastest growing group of student loan borrowers, carrying this debt into middle age and beyond. Of the 45 million adults who hold student loan debt, 1 in 5 are 50 or older. These 9 million older adults owe more than $387 billion in student loans. The Department of Education offers critical, yet under-utilized safety net programs that contribute to the financial security of older adult student loan borrowers.The goal of our student loan debt program is to increase enrollment in the federal student loan programs such as Income Driven Repayment, Public Service Loan Forgiveness, Fresh Start, and others. AARP Foundation is raising awareness of these federal programs and supporting borrowers through the enrollment process. AARP Foundation is partnering with Savi to support older student loan borrowers in navigating complicated eligibility criteria and processing paperwork with their loan servicers.

(Code:) (Expenses $ 8,128,894 including grants of $ 1,580,170) (Revenue $ 339,480)

Social Connection and Intergenerational ProgramsConnect2affect:Research shows that being connected to one's community may help alleviate poverty and improve overall health. A strong social network can become a lifeline to the kind of support and financial resources that make a difference during times of need. Through Connect2Affect, AARP Foundation calls attention to the issue and helps people build the social connections they need to thrive. Connect2affect.org provides visitors with tips on staying connected to their communities and helpful resources. In addition, through its grants program, AARP Foundation sponsors new research by national and local partners to explore how health systems, nonprofits, and community organizations can connect older adults to services that address their needs. https://connect2affect.org/Experience Corps:AARP Foundation Experience Corps is a community-based volunteer program that engages highly trained adults over 50 as tutors and mentors to help K-3 students become better readers by the end of third grade. It is a proven "triple win," helping students succeed, older adults thrive, and communities grow stronger. Experience Corps puts a special emphasis on serving diverse populations in underserved communities, while almost 70% of its volunteers come from a broad variety of non-teaching professions. https://www.aarp.org/experience-corps/

(Code:) (Expenses $ 5,276,040 including grants of $ 5,000) (Revenue $ 236,681)

Legal Advocacy:AARP Foundation conducts legal advocacy through its litigating arm, AARP Foundation Litigation - a public interest law firm at the intersection of aging and social justice. AARP Foundation Litigation's primary mission is to ensure that older adults have a voice and proper representation in the legal system.AARP Foundation attorneys advocate for systemic change in federal and state courts nationwide to advance the legal rights and interests of people 50 and older, particularly those who are vulnerable and have low income.The Litigation team files and supports lawsuits that will have a significant impact on senior poverty by reducing barriers to employment, including self-employment; increasing access to public and private benefits; protecting consumers by stopping unlawful business practices and securing refunds for those who have lost money; lowering out-of-pocket costs for key expenses, such as housing, food and health care; and promoting more racially and otherwise equitable outcomes across these areas. www.aarpfoundation.org/litigation

(Code:) (Expenses $ 16,914,237 including grants of $ 5,361,854) (Revenue $ 228,820)

Contributions and Other Programs:AARP Foundation sponsors organizations, events, and virtual conferences that highlight tangible ways to increase income and equitable outcomes for older adults living with low income. The Foundation also supported relief for older victims of Hurricane Fiona and Hurricane Ian.AARP Foundation has also awarded grants to AARP in the amount of $4,248,912 to further the Foundation's charitable mission of helping older adults with low income secure the essentials through programs that focus on caregiving, nursing, safe driving, and asset protection to safeguard income.

4d Other program services (Describe in Schedule O.)
(Expenses $ 30,319,171 including grants of $ 6,947,024) (Revenue $ 804,981)

4e **Total program service expenses ▶** 152,479,409

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules *(continued)*

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

					Yes	No
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	132			
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c	Yes	

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

			Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . **2a** 389			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	**2b**	Yes	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year? . . .	**3a**	Yes	
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation in Schedule O* . . .	**3b**	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	**4a**		No
b	If "Yes," enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . .	**5a**		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	**5b**		No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T? . . .	**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . .	**6a**		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . .	**6b**		
7	**Organizations that may receive deductible contributions under section 170(c).**			
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor? . . .	**7a**		No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided? . . .	**7b**		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . .	**7c**		No
d	If "Yes," indicate the number of Forms 8282 filed during the year . . . **7d**			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	**7e**		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**7f**		No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . .	**7g**		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . .	**7h**		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	**8**		
9	**Sponsoring organizations maintaining donor advised funds.**			
a	Did the sponsoring organization make any taxable distributions under section 4966?	**9a**		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . .	**9b**		
10	**Section 501(c)(7) organizations.** Enter:			
a	Initiation fees and capital contributions included on Part VIII, line 12 . . . **10a**			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities **10b**			
11	**Section 501(c)(12) organizations.** Enter:			
a	Gross income from members or shareholders . . . **11a**			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . **11b**			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?	**12a**		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year. **12b**			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**			
a	Is the organization licensed to issue qualified health plans in more than one state? . . . **Note.** See the instructions for additional information the organization must report on Schedule O.	**13a**		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . **13b**			
c	Enter the amount of reserves on hand . . . **13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year? . . .	**14a**		No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O* . .	**14b**		
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? . . . If "Yes," see instructions and file Form 4720, Schedule N.	**15**		No
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? . . If "Yes," complete Form 4720, Schedule O.	**16**		No
17	**Section 501(c)(21) organizations.** Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? . . If "Yes," complete Form 6069.	**17**		

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

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

Section A. Governing Body and Management

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

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

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

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶ AK , AL , AR , CA , CO , CT , FL , GA , HI , IL , KS , KY , LA , MA , MD , ME , MI , MN , MS , NC , ND , NH , NJ , NM , NV , NY , OH , OK , OR , PA , RI , SC , TN , UT , VI , WA , WI , WV

18 Section 6104 requires an organization to make its Form 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☑ Own website ☐ Another's website ☑ Upon request ☐ Other (explain in Schedule O)

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records:
▶Patricia D Shannon 601 E Street NW Washington, DC 20049 (202) 434-3399

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
(1) Lisa Marsh Ryerson President (until 6/10/22)	40.00 0.00	X		X				334,750	2,933	72,297
(2) Emily S Allen - SVP Programs & Interim Pres. (as of 6/10/22)	40.00 0.00	X		X				362,139	0	74,353
(3) Diane D Miller Vice Chair	6.00 0.00	X						0	0	0
(4) David Adame Board Member (until 7/11/22)	6.00 0.00	X						0	0	0
(5) Patricia Banks Board Member	6.00 0.00	X						0	0	0
(6) Susan Werth Board Member	6.00 0.00	X						0	0	0
(7) Ann G Daw Board Member	6.00 0.00	X						0	0	0
(8) Libby Sartain Board Chair	6.00 10.00	X						0	0	0
(9) Robert Blancato Board Member	6.00 10.00	X						0	0	0
(10) Margot James Copeland Board Member	6.00 10.00	X						0	0	0
(11) Gregory J Dyson Board Member	6.00 0.00	X						0	0	0
(12) Betty J Hudson Board Member	6.00 0.00	X						0	0	0
(13) Patricia D Shannon CFO & Senior Vice President	40.00 0.00			X				450,062	0	79,924
(14) Jami Wyatt Secretary	1.00 40.00			X				0	307,631	88,453
(15) David Whitehead SVP & Chief Development Officer	40.00 0.00				X			380,743	11,695	81,126
(16) William A Rivera SVP - Litigation	40.00 0.00				X			317,573	14,289	66,523
(17) Demerios Antzoulatos VP - Finance, Grants, & Operations	40.00 0.00					X		291,067	0	84,799

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
(18) Patrick Landers VP - Strategy & Innovation	40.00 0.00					X		276,198	0	73,675
(19) Stephen Venute VP - Corp & Fdn Relations	40.00 0.00					X		282,960	0	67,465
(20) Steven Delvecchio VP - Direct Response	40.00 0.00					X		278,038	0	59,208
(21) Marc McDonald VP - Integration	40.00 0.00					X		268,875	0	74,016

	(D)	(E)	(F)
1b Sub-Total ▶			
c Total from continuation sheets to Part VII, Section A ▶			
d Total (add lines 1b and 1c) ▶	3,242,405	336,548	821,839

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 ▶ 111

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

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
The Moore Companies Inc 5540 Ketch Road Prince Frederick, MD 20678	Commercial printing services	4,143,804
Concord Litho Group Inc 92 Old Turnpike Road Concord, NH 03301	Strategic & creative marketing services	3,680,152
Bartlit Beck LLP 54 West Hubbard Street Chicago, IL 60654	Legal services	1,896,685
The Gnar Company Inc 19 Kingston Street Boston, MA 02111	Custom software services	1,799,370
CP Direct Inc 4600 Boston Way Lanham, MD 20706	Commercial printing services	1,553,139

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 112

Part VIII Statement of Revenue

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants, and OtherAmt Similar Amounts						
1a Federated campaigns . . .	**1a**	120,718				
b Membership dues . . .	**1b**					
c Fundraising events . . .	**1c**					
d Related organizations	**1d**	3,494,109				
e Government grants (contributions)	**1e**	97,204,256				
f All other contributions, gifts, grants, and similar amounts not included above	**1f**	69,062,859				
g Noncash contributions included in lines 1a - 1f:$	**1g**	10,714				
h Total. Add lines 1a-1f . . . . ▶			169,881,942			
Program Service Revenue		Business Code				
2a Experience Corps Program Fees		900099	339,480	339,480		
b						
c						
d						
e						
f All other program service revenue.			483,091	483,091		
g Total. Add lines 2a–2f. . . . . ▶			822,571			
Other Revenue						
3 Investment income (including dividends, interest, and other similar amounts) . . . ▶			11,887,242		55,265	11,831,977
4 Income from investment of tax-exempt bond proceeds ▶						
5 Royalties . . . . ▶						
		(i) Real	(ii) Personal			
6a Gross rents	**6a**					
b Less: rental expenses	**6b**					
c Rental income or (loss)	**6c**					
d Net rental income or (loss) . . . . ▶						
		(i) Securities	(ii) Other			
7a Gross amount from sales of assets other than inventory	**7a**	474,254,332				
b Less: cost or other basis and sales expenses	**7b**	459,640,593	57,479			
c Gain or (loss)	**7c**	14,613,739	-57,479			
d Net gain or (loss) . . . . ▶			14,556,260		264,701	14,291,559
8a Gross income from fundraising events (not including $ ______ of contributions reported on line 1c). See Part IV, line 18	**8a**					
b Less: direct expenses	**8b**					
c Net income or (loss) from fundraising events . . ▶						
9a Gross income from gaming activities. See Part IV, line 19 . . .	**9a**					
b Less: direct expenses	**9b**					
c Net income or (loss) from gaming activities . . ▶						
10a Gross sales of inventory, less returns and allowances . .	**10a**					
b Less: cost of goods sold . .	**10b**					
c Net income or (loss) from sales of inventory . . ▶						
OtherRevenueMiscAmt		Business Code				
11a Legal settlement		900099	6,015,047			6,015,047
b Partnership K-1 Income		900099	277,875		-2,240	280,115
c CGA severance/change in value		900099	-226,074			-226,074
d All other revenue			2,103			2,103
e Total. Add lines 11a–11d . . . . ▶			6,068,951			
12 Total revenue. See instructions . . . . ▶			203,216,966	822,571	317,726	32,194,727

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	17,702,224	17,702,224		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	65,538,564	65,538,564		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	1,956,059	552,176	994,962	408,921
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	33,637,330	24,135,345	5,550,159	3,951,826
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,140,908	796,077	204,489	140,342
9 Other employee benefits	3,499,403	2,495,155	587,078	417,170
10 Payroll taxes	2,212,570	1,456,599	455,842	300,129
11 Fees for services (non-employees):				
a Management				
b Legal	316,715	316,715		
c Accounting	170,000		170,000	
d Lobbying				
e Professional fundraising services. See Part IV, line 17	1,832,265			1,832,265
f Investment management fees	4,157,333	2,508	4,153,959	866
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	12,380,895	9,963,949	1,855,626	561,320
12 Advertising and promotion	3,854,527	1,346,393	1,799,064	709,070
13 Office expenses	2,309,926	2,282,423	9,445	18,058
14 Information technology	9,073,798	8,336,507	611,365	125,926
15 Royalties . .				
16 Occupancy	3,387,524	2,962,822	266,955	157,747
17 Travel	739,985	592,505	80,373	67,107
18 Payments of travel or entertainment expenses for any federal, state, or local public officials .				
19 Conferences, conventions, and meetings	84,123	10,123	73,875	125
20 Interest	582,627	158,157	369,847	54,623
21 Payments to affiliates				
22 Depreciation, depletion, and amortization . .	1,516,213	715,940	554,603	245,670
23 Insurance . . .				
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 Printing & postage	21,622,171	7,551,249	80,309	13,990,613
b Volunteer expenses	3,177,586	3,157,780	19,806	
c Telecommunication expen	1,644,199	1,576,507	35,230	32,462
d Taxes & Licenses	1,159,056	253,219	821,455	84,382
e All other expenses	1,709,208	576,472	983,162	149,574
25 **Total functional expenses.** Add lines 1 through 24e	195,405,209	152,479,409	19,677,604	23,248,196
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☑ if following SOP 98-2 (ASC 958-720).	16,351,191	5,596,538	0	10,754,653

Part X Balance Sheet

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

					(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing			3,971,589	1	2,328,296
	2	Savings and temporary cash investments			8,146,436	2	7,234,612
	3	Pledges and grants receivable, net			10,682,402	3	13,222,990
	4	Accounts receivable, net				4	193
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons				5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)				6	
	7	Notes and loans receivable, net				7	
	8	Inventories for sale or use				8	
	9	Prepaid expenses and deferred charges			797,565	9	997,938
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	29,963,546			
	b	Less: accumulated depreciation	10b	19,511,202	12,008,778	10c	10,452,344
	11	Investments—publicly traded securities			251,635,091	11	287,072,370
	12	Investments—other securities. See Part IV, line 11			410,610,943	12	336,318,235
	13	Investments—program-related. See Part IV, line 11			5,112,604	13	4,824,969
	14	Intangible assets			218,627	14	201,367
	15	Other assets. See Part IV, line 11				15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)			703,184,035	16	662,653,314
Liabilities	17	Accounts payable and accrued expenses			18,707,583	17	22,010,798
	18	Grants payable			8,091,301	18	10,038,045
	19	Deferred revenue				19	
	20	Tax-exempt bond liabilities			25,000,000	20	25,000,000
	21	Escrow or custodial account liability. Complete Part IV of Schedule D				21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons				22	
	23	Secured mortgages and notes payable to unrelated third parties				23	
	24	Unsecured notes and loans payable to unrelated third parties				24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D			3,318,523	25	3,185,224
	26	**Total liabilities.** Add lines 17 through 25			55,117,407	26	60,234,067
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ ☑ and complete lines 27, 28, 32, and 33.**					
	27	Net assets without donor restrictions			151,046,647	27	147,112,691
	28	Net assets with donor restrictions			497,019,981	28	455,306,556
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.					
	29	Capital stock or trust principal, or current funds				29	
	30	Paid-in or capital surplus, or land, building or equipment fund				30	
	31	Retained earnings, endowment, accumulated income, or other funds				31	
	32	Total net assets or fund balances			648,066,628	32	602,419,247
	33	Total liabilities and net assets/fund balances			703,184,035	33	662,653,314

Part XI Reconcilliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	203,216,966
2	Total expenses (must equal Part IX, column (A), line 25)	2	195,405,209
3	Revenue less expenses. Subtract line 2 from line 1	3	7,811,757
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	648,066,628
5	Net unrealized gains (losses) on investments	5	-53,459,138
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column	10	602,419,247

Part XII Financial Statements and Reporting

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

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☑ Accrual ☐ Other If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☑ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	3a	Yes	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.	3b	Yes	

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

SCHEDULE A (Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

f Enter the number of supported organizations . . . .

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . .	248,393,740	263,901,186	167,121,307	161,205,196	169,881,942	1,010,503,371
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge. .						
4 **Total.** Add lines 1 through 3	248,393,740	263,901,186	167,121,307	161,205,196	169,881,942	1,010,503,371
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . .						203,191,557
6 **Public support.** Subtract line 5 from line 4.						807,311,814

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4. .	248,393,740	263,901,186	167,121,307	161,205,196	169,881,942	1,010,503,371
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . .	11,340,283	16,687,556	14,752,606	21,025,332	12,165,117	75,970,894
9 Net income from unrelated business activities, whether or not the business is regularly carried on. .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). .	922,364	1,197,600	524,704	1,877,205	6,613,647	11,135,520
11 **Total support.** Add lines 7 through 10						1,097,609,785

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

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

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f) divided by line 11, column (f)) . . . . | 14 | 73.550 %

15 Public support percentage for 2020 Schedule A, Part II, line 14 . . . . | 15 | 68.320 %

16a **33 1/3% support test—2022.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . ▶☑

b **33 1/3% support test—2021.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . ▶☐

17a **10%-facts-and-circumstances test—2022.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . ▶☐

b **10%-facts-and-circumstances test—2021.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . ▶☐

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

Part III **Support Schedule for Organizations Described in Section 509(a)(2)**
(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . .						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b. .						
8 **Public support.** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6. . .						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . .						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . .						
13 **Total support.** (Add lines 9, 10c, 11, and 12.). .						

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f) divided by line 13, column (f))	15	
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2022** (line 10c, column (f) divided by line 13, column (f))	17	
18 Investment income percentage from **2021** Schedule A, Part III, line 17	18	

19a **33 1/3% support tests-2022.** 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—2021.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶☐

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

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

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

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

Section E. Type III Functionally-Integrated Supporting Organizations

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

a ☐ The organization satisfied the Activities Test. Complete **line 2** below.

b ☐ The organization is the parent of each of its supported organizations. Complete **line 3** below.

c ☐ The organization supported a governmental entity. Describe in **Part VI** how you supported a government entity (see instructions)

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

			Yes	No
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in **Part VI identify those supported organizations and explain** how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	2a		
b	Did the activities described on line 2a, above constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in **Part VI** the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	2b		
3	Parent of Supported Organizations. **Answer lines 3a and 3b below.**			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations?*If "Yes" or "No", provide details in **Part VI.***	3a		
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? *If "Yes," describe in **Part VI.** the role played by the organization in this regard.*	3b		

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

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

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

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

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

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

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

Section D - Distributions		Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (*prior IRS approval required - provide details in* ***Part VI***)	5	
6 Other distributions (*describe in* ***Part VI***). See instructions	6	
7 **Total annual distributions.** Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (*provide details in* ***Part VI***). See instructions	8	
9 Distributable amount for 2022 from Section C, line 6	9	
10 Line 8 amount divided by Line 9 amount	10	

Section E - Distribution Allocations (see instructions)	**(i)** Excess Distributions	**(ii)** Underdistributions Pre-2022	**(iii)** Distributable Amount for 2022
1 Distributable amount for 2022 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2022 (reasonable cause required-- *explain in* ***Part VI***). See instructions.			
3 Excess distributions carryover, if any, to 2022:			
a From 2017.			
b From 2018.			
c From 2019.			
d From 2020.			
e From 2021.			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2022 distributable amount			
i Carryover from 2017 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2022 from Section D, line 7: $			
a Applied to underdistributions of prior years			
b Applied to 2022 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, *explain in* ***Part VI***. See instructions.			
6 Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, *explain in* ***Part VI***. See instructions.			
7 **Excess distributions carryover to 2023.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2018.			
b Excess from 2019.			
c Excess from 2020.			
d Excess from 2021.			
e Excess from 2022.			

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

Facts And Circumstances Test

Return Reference	Explanation
Part II, Line 10 (A):	2018 Experience Corps program fees - $907,953 2018 All other program income - $213,238 2018 CGA severence - $226,859 2018 CGA change in value - ($436,277) 2018 Fundraising income - $10,150 2018 Miscellaenous income - $441 Total 2018 Program Service & Other Income - $922,364
Part II, Line 10 (B):	2019 Experience Corps program fees - $945,380 2019 All other program income - $441,701 2019 CGA severence - $215,914 2019 CGA change in value - ($405,481) 2019 Miscellaenous income - $87 Total 2019 Program Service & Other Income - $1,197,601
Part II, Line 10 (C):	2020 Experience Corps program fees - $268,525 2020 All other program income - $404,715 2020 CGA severence - $117,822 2020 CGA change in value - ($266,358) Total 2020 Program Service & Other Income - $524,704
Part II, Line 10 (D):	2021 Experience Corps program fees - $528,953 2021 All other program income - $1,536,526 2021 CGA severence - $21,402 2021 CGA change in value - ($209,693) 2021 Miscellaneous income - $17 Total 2021 Program Service & Other Income - $1,877,206
Part II, Line 10 (E):	2022 Experience Corps program fees - $339,480 2022 All other program income - $483,091 2022 CGA severence - $102,021 2022 CGA change in value - ($328,095) 2022 Miscellaneous income - $2,103 2022 Legal settlement - $6,015,047 Total 2022 Program Service & Other Income - $6,613,647

Additional Data

Return to Form

Software ID:

Software Version:

Schedule B

(Form 990)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2022

Name of the organization
AARP Foundation

Employer identification number

52-0794300

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☐ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

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

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

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

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

Name of organization
AARP Foundation

Employer identification number
52-0794300

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
RESTRICTED	,	$ RESTRICTED	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
AARP Foundation

Employer identification number

52-0794300

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

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

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

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

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

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

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

Name of organization
AARP Foundation

Employer identification number
52-0794300

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

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

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate value of contributions to (during year)		
3	Aggregate value of grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).
- ☐ Preservation of land for public use (e.g., recreation or education)
- ☐ Preservation of an historically important land area
- ☐ Protection of natural habitat
- ☐ Preservation of a certified historic structure
- ☐ Preservation of open space

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

b Assets included in Form 990, Part X ▶ $

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

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

a ☐ Public exhibition

b ☐ Scholarly research

c ☐ Preservation for future generations

d ☐ Loan or exchange programs

e ☐ Other ....

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

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

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

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

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

			Amount
c	Beginning balance	1c	
d	Additions during the year	1d	
e	Distributions during the year	1e	
f	Ending balance	1f	

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

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

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

	(a) Current year	**(b)** Prior year	**(c)** Two years back	**(d)** Three years back	**(e)** Four years back
1a Beginning of year balance	519,049,792	469,744,289	442,770,788	307,583,157	244,360,170
b Contributions	1,945,206	304,187	377,860	81,030,355	78,113,983
c Net investment earnings, gains, and losses	-24,250,476	66,463,852	40,251,351	55,109,672	-13,990,060
d Grants or scholarships					
e Other expenditures for facilities and programs	20,648,675	17,462,536	13,655,710	952,396	-900,936
f Administrative expenses					
g End of year balance	476,095,847	519,049,792	469,744,289	442,770,788	307,583,157

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

a Board designated or quasi-endowment ▶ 5.791 %

b Permanent endowment ▶ 94.209 %

c Term endowment ▶ ....

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

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

			Yes	No
	(i) Unrelated organizations	3a(i)		No
	(ii) Related organizations	3a(ii)		No
b	If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?	3b		

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

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

Description of property	**(a)** Cost or other basis (investment)	**(b)** Cost or other basis (other)	**(c)** Accumulated depreciation	**(d)** Book value
1a Land		4,440,000		4,440,000
b Buildings		22,736,908	16,893,913	5,842,995
c Leasehold improvements				
d Equipment				
e Other		2,786,638	2,617,289	169,349
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ▶				10,452,344

Part VII Investments - Other Securities.
Complete if the organization answered "Yes" on Form 990, Part IV, line 11b.See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A) BNYM investment portfolio	331,512,844	F
(B) Charitable gift annuities	4,805,391	F
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 12.)* ▶	336,318,235	

Part VIII Investments - Program Related.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

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

Part IX Other Assets.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

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

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 25.)* ▶	3,185,224

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

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

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

1	Total revenue, gains, and other support per audited financial statements			1	198,412,697
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a	-53,459,138		
b	Donated services and use of facilities	2b	54,346,246		
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	887,108
3	Subtract line **2e** from line **1**			3	197,525,589
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b	5,691,377		
c	Add lines **4a** and **4b**			4c	5,691,377
5	Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.)			5	203,216,966

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

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

1	Total expenses and losses per audited financial statements			1	244,060,078
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a	54,346,246		
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d	57,479		
e	Add lines **2a** through **2d**			2e	54,403,725
3	Subtract line **2e** from line **1**			3	189,656,353
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b	5,748,856		
c	Add lines **4a** and **4b**			4c	5,748,856
5	Total expenses. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18.)			5	195,405,209

Part XIII Supplemental Information

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

Return Reference	Explanation
Part V, Line 4:	Board Designated Quasi-Endowment The Foundation's net assets without donor restrictions include amounts designated by its board of directors to function as a quasi-endowment fund. The Foundation may spend the board-designated quasi-endowment in accordance with the spending policy. Assets of both the donor-restricted and quasi-endowment funds are invested in a broadly diversified portfolio spread over multiple asset classes.
Part X, Line 2:	AARP Foundation has determined that there are no material uncertain tax positions that require recognition or disclosure in the financial statements.
Part XI, Line 4b - Other Adjustments:	statements Loss on disposal of fixed assets treated as expense in the financial -57,479. Investment expenses treated as contra-revenue in the financial statements 4,157,333. Investment expenses from K-1s included in unrealized gain on financial 1,591,523. statements
Part XII, Line 2d - Other Adjustments:	Loss on disposal of fixed assets treated as expense in the financial statements 57,479.
Part XII, Line 4b - Other Adjustments:	Investment expenses treated as contra-revenue in the financial statements 4,157,333. Investment expenses from K-1s included in unrealized gain on financial 1,591,523. statements

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE F (Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

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

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

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

	(a) Region	**(b)** Number of offices in the region	**(c)** Number of employees, agents, and independent contractors in the region	**(d)** Activities conducted in region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	**(e)** If activity listed in (d) is a program service, describe specific type of service(s) in the region	**(f)** Total expenditures for and investments in the region
(1)	Central America and the Caribbean	0	0	BNYM investment portfolio		103,331,922
(2)	Europe (Including Iceland & Greenland)	0	0	BNYM investment portfolio		20,194,541
(3)	North America	0	0	BNYM investment portfolio		5,403,151
(4)						
(5)						
(6)						
(7)						
(8)						
(9)						
(10)						
(11)						
(12)						
(13)						
(14)						
(15)						
(16)						
(17)						
3a	Sub-total	0	0			128,929,614
b	Total from continuation sheets to Part I . . .	0	0			0
c	**Totals** (add lines 3a and 3b)	0	0			128,929,614

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

1 **(a)** Name of organization	**(b)** IRS code section and EIN (if applicable)	**(c)** Region	**(d)** Purpose of grant	**(e)** Amount of cash grant	**(f)** Manner of cash disbursement	**(g)** Amount of noncash assistance	**(h)** Description of noncash assistance	**(i)** Method of valuation (book, FMV, appraisal, other)
(1)								
(2)								
(3)								
(4)								
(5)								
(6)								
(7)								
(8)								
(9)								
(10)								
(11)								
(12)								
(13)								
(14)								
(15)								
(16)								

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

3 Enter total number of other organizations or entities . . . . ▶

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

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

Part IV Foreign Forms

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

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

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

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

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

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

Part V Supplemental Information

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

ReturnReference	Explanation
Part III Accounting Method:	
Schedule F, Part IV, Questions 1 and 3 - 5	Question 1: AARP Foundation invests in several alternative investment funds, some of which are, or may invest (directly or indirectly) in, foreign corporations. AARP Foundation will file other IRS forms in connection with such investments as necessary. Question 3: AARP Foundation invests in several alternative investment funds, some of which are, or may invest (directly or indirectly) in, foreign corporations. AARP Foundation will file other IRS forms in connection with such investments as necessary. Question 4: AARP Foundation invests in several alternative investment funds, some of which are, or may invest (directly or indirectly) in, passive foreign investment companies. AARP Foundation will file other IRS forms in connection with such investments as necessary. Question 5: AARP Foundation invests in several alternative investment funds, some of which are, or may invest (directly or indirectly) in, foreign partnerships. AARP Foundation will file other IRS forms in connection with such investments as necessary.

Additional Data

Software ID:

Software Version:

SCHEDULE G (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

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

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

- **a** ☑ Mail solicitations
- **b** ☑ Internet and email solicitations
- **c** ☑ Phone solicitations
- **d** ☑ In-person solicitations
- **e** ☑ Solicitation of non-government grants
- **f** ☑ Solicitation of government grants
- **g** ☐ Special fundraising events

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

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
1 Chapman Cubine Allen and Hussey Inc 2000 15th Street North Ste 550 Arlington, VA 22201	Direct mail production management services		No	0	628,732	0
2 Gift Strategies LLC 1539 Fall River Ave Ste 3 Seekonk, MA 02771	Outbound calling services to donors		No	0	611,153	0
3 Blue State Digital 41 Flatbush Avenue 8th Fl Brooklyn, NY 11217	Marketing advisory services		No	0	544,380	0
4 Amergent 9 Centennial Drive Peabody, MA 01960	Marketing advisory services		No	0	48,000	0
5						
6						
7						
8						
9						
10						
Total . . . . ▶					1,832,265	

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

AL, AK, AZ, AR, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

Part II **Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

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

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

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

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

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: ____________

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: ____________

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

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

13 Indicate the percentage of gaming activity conducted in:

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

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

Name ▶

Address ▶

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

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

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

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

Director/officer Employee Independent contractor

17 Mandatory distributions:

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

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

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

Return Reference	Explanation
Schedule G, Part I, Line 2b, Column (v):	These entities do not raise funds directly for AARP Foundation, but provide counsel, services, and support to AARP Foundation's internal development office. The amounts reflected in Schedule G are for the professional services and reimbursements paid by AARP Foundation for promotional and travel expenses.
Schedule G, Part I, Line 2b, Column (v):	Chapman Cubine Allen and Hussey, Inc. Professional fundraising fee $628,732 Consulting fee $14,406 Advertising & promotion $158,818 Total paid to Chapman Cubine Allen and Hussey, Inc. $801,956 Gift Strategies LLC Professional fundraising fee $611,153 Total paid to Gift Strategies LLC $611,153 Blue State Digital Professional fundraising fee $544,380 Consulting fee $118,984 Total paid to Blue State Digital $663,364 Amergent Professional fundraising fee $48,000 Advertising & promotion $16,900 Technology fee $68,900 Total paid to Amergent $133,800

Additional Data

Return to Form

Software ID:

Software Version:

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

Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

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

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

OMB No. 1545-0047
2022
Open to Public Inspection

Name of the organization: AARP Foundation
Employer identification number: 52-0794300

Part I General Information on Grants and Assistance

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

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

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) AARP 601 E Street NW Washington, DC 20049	95-1985500	501(c)(4)	4,248,912	0			Charitable work conducted on behalf of AARP Foundation
(2) Older Adults Technology Services 168 7th Street Suite 3A Brooklyn, NY 11215	55-0882599	501(c)(3)	1,800,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(3) 3 Leaf Literacy Leadership and Learning Institute 5209 Clubview Drive Dallas, TX 75232	52-2416615	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(4) Abington Township Public Library 1030 Old York Road Abington, PA 19001	23-6000025	Govt. entity	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(5) Accounting Aid Society 3031 W Grand Blvd Suite 470 Detroit, MI 48202	23-7310753	501(c)(3)	200,000	0			Grant to support AARP Foundation's Tax and Credit program
(6) Adelante Development Center 3900 Osuna Road NE Albuquerque, NM 87109	85-0262072	501(c)(3)	60,000	0			Grant to support AARP Foundation's Benefits program
(7) AES Literacy Institute Incorporated 8204 Elmbrook Drive Ste 213 Dallas, TX 75247	83-3899952	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(8) Agency on Aging of South Central Connecticut 117 Washington Avenue Suite 17 New Haven, CT 06473	06-0915531	501(c)(3)	5,051	0			Grant to support AARP Foundation's Experience Corps program
(9) Aging People in Prison Human Rights Campaign 4306 Belvieu Avenue Baltimore, MD 21215	83-2771682	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(10) Alameda County Food Bank 7900 Edgewater Drive Oakland, CA 94621	94-2960297	501(c)(3)	90,000	0			Grant to support AARP Foundation's SNAP benefits program
(11) Arapahoe County Government 1690 W Littleton Blvd Littleton, CO 80120	84-6000740	Government	7,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(12) Ashville-Buncombe Technical Community College 340 Victoria Rd Ashville, NC 28801	56-1993458	501(c)(3)	28,900	0			Grant to support AARP Foundation's Workforce program
(13) Atlanta Community Food Bank 732 Joseph E Lowery Blvd NW Atlanta, GA 30318	58-1376648	501(c)(3)	68,995	0			Grant to support AARP Foundation's SNAP benefits program
(14) Atlanta Center Self-Sufficiency 460 Edgewood Ave SE Atlanta, GA 30312	58-1479816	501(c)(3)	30,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(15) Austin Area Urban League 8011 Cameron Road Ste A100 Austin, TX 78754	74-1890518	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(16) Benefits Data Trust Two Logan Square Ste 550 Philadelphia, PA 19102	20-3455598	501(c)(3)	450,000	0			Grant to support AARP Foundation's SNAP benefits program
(17) Benefits in Action PO Box 140598 Edgewater, CO 80214	87-3774775	501(c)(3)	638,973	0			Grant to support AARP Foundation's Benefits program
(18) Boys-Girls Club Washington 4103 Benning Road NE Washington, DC 20019	53-0236759	501(c)(3)	300,000	0			Grant to support AARP Foundation's Experience Corps program
(19) Brevard Workforce Development Board Inc 297 Barnes Blvd Rockledge, FL 32955	59-3031785	501(c)(3)	65,000	0			Grant to support AARP Foundation's Workforce program
(20) Career Gear Houston 7500 Bellaire Blvd Ste BB20 Houston, TX 77036	20-2383035	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(21) Chicago Cook Workforce Partnership 69 W Washington Suite 2860 Chicago, IL 60602	36-4122225	501(c)(3)	105,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ & Back to Work 50+ programs
(22) Chicago Housing Authority 60 E Van Buren Chicago, IL 60605	36-6000618	Government	8,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(23) Chinatown Services Center 767 N Hill Street Suite 400 Los Angeles, CA 90012	95-2918844	501(c)(3)	205,000	0			Grant to support AARP Foundation's SNAP benefits program
(24) Chinese Community Center Inc 9800 Town Park Drive Houston, TX 77036	76-0067885	501(c)(3)	450,000	0			Grant to support AARP Foundation's Benefits program
(25) City of Edwardsville 112 S Kansas Street Edwardsville, IL 62025	37-6001409	Government	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(26) City of Pottsboro PO Box 477 Pottsboro, TX 75076	75-6003903	Government	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(27) City of Refuge Incorporated 1300 Joseph E Boone Blvd NW Atlanta, GA 30314	58-2194642	501(c)(3)	85,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(28) City of Tempe 20 E 6th Street Tempe, AZ 85281	86-6000262	Government	37,493	0			Grant to support AARP Foundation's Experience Corps program
(29) Coalition Latinoamericana 4938 Central Avenue Charlotte, NC 28205	58-1945776	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(30) Coalition on Adult Basic Education PO Box 14400 Bradenton, FL 34280	59-3164580	501(c)(3)	150,000	0			Grant to support AARP Foundation's Workforce program
(31) Dress for Success Charity New Orleans 1700 Josephine St Ste 101 New Orleans, LA 70113	72-1444242	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(32) Dress for Success Pittsburgh 305 34th Street Pittsburgh, PA 15201	20-2388089	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(33) Dress for Success Triangle NC 1812 Tillery Place Ste 105 Raleigh, NC 27604	26-2229898	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(34) Dress for Success Winston Salem 375 Buxton Street Winston Salem, NC 27101	26-3973444	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(35) East Harris County Empowerment Council 11821 E Freeway Ste 500 Houston, TX 77029	27-0377576	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(36) East Side Learning Center 740 York Avenue Saint Paul, MN 55106	04-3699678	501(c)(3)	191,957	0			Grant to support AARP Foundation's Experience Corps program
(37) Economic Opportunity for Savannah Chatham County Area Inc 618 W Anderson Street Savannah, GA 31415	58-0952632	501(c)(3)	60,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(38) El Camino Community College 16007 Crenshaw Blvd Torrance, CA 90506	95-6001060	Govt. entity	30,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(39) Elder Law of Michigan Inc 3815 W St Joseph Street No C200 Lansin, MI 48917	38-2960530	501(c)(3)	148,868	0			Grant to support AARP Foundation's Benefits program
(40) Elev8 Baltimore Inc 800 N Charles Street Ste 400 Baltimore, MD 21201	46-0889783	501(c)(3)	300,000	0			Grant to support AARP Foundation's Experience Corps program
(41) Enterprise Community Partners 70 Corporate Center 11000 Broken Land Pkwy Ste 700 Columbia, MD 21044	52-1231931	501(c)(3)	95,000	0			Grant to support AARP Foundation's Benefits program
(42) Evelyn Rubenstein Jewish Community Center 5601 S Braeswood Blvd Houston, TX 77096	74-1198298	501(c)(3)	12,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(43) Family Service Center of Houston and Harris County PO Box 70068 Houston, TX 77270	74-1152613	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(44) Father Matters Inc PO Box 13575 Tempe, AZ 85284	91-1846806	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(45) Fundacion Fondo Acceso a la Justicia 800 Edificio Comercial 18 Ofic 201-A San Juan, PR 00907	66-0831102		150,000	0			Donation for disaster recovery
(46) Feeding Texas 1524 S IH 35 Suite 342 Austin, TX 78704	74-2762542	501(c)(3)	125,000	0			Grant to support AARP Foundation's SNAP benefits program
(47) Feeding the Gulf Coast 5248 Mobile South Street Theodore, AL 36582	63-0821997	501(c)(3)	150,000	0			Grant to support AARP Foundation's SNAP benefits program
(48) Fisher Titus Medical Center 272 Benedict Avenue Norwalk, OH 44857	34-4430716	501(c)(3)	146,625	0			Grant to support AARP Foundation's Benefits program
(49) FRAC (Food Research & Action Center) 1200 18th Street NW Suite 400 Washington, DC 20036	23-7200739	501(c)(3)	50,000	0			Grant to support AARP Foundation's SNAP benefits program
(50) Foundation Communities 3036 S 1st Street Suite 200 Austin, TX 78704	74-2563260	501(c)(3)	113,928	0			Grant to support AARP Foundation's Benefits program
(51) Friends of the New Orleans Public Library 219 Loyola Avenue New Orleans, LA 70112	72-6028003	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(52) Friends of the Tomball Community Library 30555 State Highway 249 Tomball, TX 77375	47-4487756	501(c)(3)	8,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(53) Full Circle Communities 310 S Peoria Street Ste 500 Chicago, IL 60607	36-4382850	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(54) Gervonni Cares Inc 10332 W Crown King Road Tolleson, AZ 85353	85-2229689	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(55) Goodwill Industries of the Coastal Empire Inc 7220 Sallie Mood Drive Savannah, GA 31406	46-1548302	501(c)(3)	30,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(56) Greater Cleveland Volunteers 4415 Euclid Avenue Ste 200 Cleveland, OH 44103	34-1356768	501(c)(3)	12,508	0			Grant to support AARP Foundation's Experience Corps program
(57) Harris County Friends of the Library 5749 South Loop E Houston, TX 77033	76-0240145	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(58) Hispanic Chamber of Commerce of LA Foundation 1515 Poydras St Ste 1010 New Orleans, LA 70112	22-3939922	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(59) Housing Authority City of Pittsburgh 200 Ross Street 8th Fl Pittsburgh, PA 15219	25-6001768	Govt. entity	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(60) Housing Authority of the City of Brownsville 2606 Boca Chica Blvd Brownsville, TX 78521	74-6000426	Govt. entity	12,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(61) Housing Authority of the City of Goldsboro 700 N Jefferson Avenue Goldsboro, NC 27530	56-6003260	Govt. entity	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(62) Houston Food Bank 535 Portwall Street Houston, TX 77029	76-0311190	501(c)(3)	120,850	0			Grant to support AARP Foundation's SNAP benefits program
(63) Hunger Free America Inc 50 Broad Street Ste 1103 New York, NY 10004	13-3471350	501(c)(3)	150,000	0			Grant to support AARP Foundation's SNAP benefits program
(64) Info Line of San Diego County 3860 Calle Fortunada Ste 101 San Diego, CA 92123	33-1029843	501(c)(3)	525,000	0			Grant to support AARP Foundation's SNAP benefits program
(65) Iowa Center of Economic Success 8345 University Blvd Ste F Clive, IA 50325	20-1037604	501(c)(3)	10,000	0			Grant to support AARP Foundation's Work for Yourself 50+ program
(66) Jefferson State Community College 2601 Carson Road Birmingham, AL 35215	63-0501357	Govt. entity	25,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(67) Jewish Family Services of San Antonio Texas Inc 12500 N W Military Hwy 250 San Antonio, TX 78231	74-1759254	501(c)(3)	8,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(68) Jewish Family Services of Greater Dallas Inc 5402 Arapaho Road Dallas, TX 75248	75-1992728	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(69) LA Family Housing Corp 7843 Lankershim Blvd North Hollywood, CA 91605	95-3920560	501(c)(3)	450,000	0			Grant to Improved Financial Stability for Older Adults Experiencing Homelessness in Los Angeles
(70) Lee County Legal Aid Society 2400 First St Unit 214 Fort Myers, FL 33901	59-1163686	501(c)(3)	150,000	0			Grant to support disaster relief
(71) Legal Aid at Work 180 Montgomery Street Ste 600 San Francisco, CA 94104	94-2783401	501(c)(3)	75,000	0			Grant to support AARP Foundation's Benefits program
(72) Legal Aid Services of Broward County 491 North State Road 7 Plantation, FL 33317	59-1547191	501(c)(3)	150,000	0			Grant to support disaster relief
(73) Legal Society of Cleveland 1223 W 6th Street Cleveland, OH 44113	34-0866026	501(c)(3)	100,000	0			Grant to Relieve Debt Burdens for Older Consumers through Legal Aid
(74) L-H Transitional Center Inc 2410 Caplin St Houston, TX 77026	76-0654765	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(75) Literacy Action Inc 231 Peachtree St NE Ste M100 Atlanta, GA 30303	58-1053728	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(76) Literations 25 Kingston Street 4th Fl Boston, MA 02111	04-3227007	501(c)(3)	194,105	0			Grant to support AARP Foundation's Experience Corps program
(77) Medicare Rights Center Inc 1444 I Street NW Ste 1105 Washington, DC 20005	13-3505372	501(c)(3)	150,000	0			Grant to support AARP Foundation's Benefits program
(78) Mesa Community Action Network Inc 868 E University Drive Mesa, AZ 85203	86-0558407	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(79) Metropolitan Family Service 230 NE 2nd Avenue Ste 2 Hillsboro, OR 97124	93-0397825	501(c)(3)	94,501	0			Grant to support AARP Foundation's Experience Corps program
(80) MHP Salud 2111 Golfside Drive 2B Ypsilanti, MI 48197	38-3092194	501(c)(3)	445,104	0			Grant to support AARP Foundation's Benefits program
(81) mRelief 233 N Michigan Avenue Chicago, IL 60601	47-3559589	501(c)(3)	352,665	0			Grant to support AARP Foundation's SNAP benefits program
(82) National Experienced Workforce Solutions 3811 North Fairfax Drive Suite 900 Arlington, VA 22203	52-2003078	501(c)(3)	250,000	0			Grant to support AARP Foundation's Workforce program
(83) National Foundation for Credit Counseling 2033 K Street NW Suite 425 Washington, DC 20006	53-0132493	501(c)(3)	150,000	0			Grant to support AARP Foundation's SNAP benefits program
(84) New Hanover County 230 Government Center Dr Ste 165 Wilmington, NC 28403	56-6000324	Government	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(85) Northampton Community College 3835 Green Pond Road Bethlehem, PA 18020	23-6417444	Govt. entity	30,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(86) Northwest Georgia Housing Authority PO Box 1428 Rome, GA 30162	75-3115354	Government	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(87) Opportunities for Success Education Center Inc 13405 Floyd Circle Ste 106 Dallas, TX 75243	81-4875958	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(88) Orange County's United Way 18012 Mitchell South Irvine, CA 92614	33-0047994	501(c)(3)	120,000	0			Grant to support AARP Foundation's Tax and Credit program
(89) Pennsylvania Association for the Blind 71 S 1st Avenue Coatesville, PA 19320	23-1403149	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(90) Ponce Neighborhood Housing Services Inc 57 Calle Mendez Vigo Ponce, PR 00730	66-0501718	501(c)(3)	125,000	0			Grant to support disaster relief
(91) Region One Education Service Center 1900 W Schunior Edinburg, TX 78541	74-1588186	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(92) Richland County Public Library 1431 Assembly Street Columbia, SC 29201	57-6000396	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(93) Sacramento Food Bank 3333 3rd Avenue Sacramento, CA 95817	94-3315566	501(c)(3)	60,000	0			Grant to support AARP Foundation's SNAP benefits program
(94) San Antonio Food Bank 5200 Old Highway 90 West San Antonio, TX 78227	74-2122979	501(c)(3)	155,000	0			Grant to support AARP Foundation's SNAP benefits program
(95) San Francisco Marin Food Bank 900 Pennsylvania Avenue San Francisco, CA 94107	94-3041517	501(c)(3)	110,000	0			Grant to support AARP Foundation's SNAP benefits program
(96) St Bernard Project Total 2645 Toulouse Street New Orleans, LA 70119	26-2189665	501(c)(3)	225,000	0			Grant to support disaster relief
(97) South Carolina Association of Community Action 2700 Middleburg Dr Columbia, SC 29204	55-0861643	501(c)(3)	190,000	0			Grant to support AARP Foundation's Workforce program
(98) SC Thrive 2211 Alpine Road Extension Columbia, SC 29223	90-1011409	501(c)(3)	427,902	0			Grant to support AARP Foundation's SNAP benefits program
(99) Seattle Jobs Initiative 1200 12th Ave S Unit 160 Seattle, WA 98144	47-0900181	501(c)(3)	17,615	0			Grant to support AARP Foundation's Workforce program
(100) Senior Community Services Inc 600 Swarthmore Avenue Folsom, PA 19033	23-2036247	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(101) Senior Friendship Centers 1888 Brother Geenen Way Sarasota, FL 34236	59-1522614	501(c)(3)	300,000	0			Grant to support disaster relief
(102) Single Stop USA Inc 123 William St 901 New York, NY 10038	20-8837690	501(c)(3)	200,000	0			Grant to support AARP Foundation's Tax and Credit program
(103) South AL Regional Planning Commission 110 Beauregard St Suite 207 Mobile, AL 36602	63-0501382	501(c)(3)	148,000	0			Grant to support AARP Foundation's Benefits program
(104) South Central Workforce Investment Board 4201 Crums Mill Road Ste 200 Harrisburg, PA 17112	51-0475788	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(105) St Bernard Parish Government Workforce 8201 West Judge Perez Drive Chalmette, LA 70043	72-0976906	Government	85,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(106) Stem Atlanta Women Inc 191 Peachtree St NW Ste 3975 Atlanta, GA 30303	81-2581796	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(107) System for Education Empowerment and Success 7037 Capitol Street Ste E221 Houston, TX 77011	26-2955047	501(c)(3)	8,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(108) The Business Center for Entrepreneurship 7500 Germantown Avenue Elders Hall Suite 113 Philadelphia, PA 19119	23-2972070	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(109) The Edge Connection 975 Cobb Place Boulevard NW Kennesaw, GA 30144	58-2634871	501(c)(3)	6,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(110) The LGBTQ Center of Durham Inc 112 W Main Street Durham, NC 27701	27-1277498	501(c)(3)	100,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(111) The Salvation Army 1250 W 119th Street Chicago, IL 60643	36-2167909	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(112) The Women's Resource of Greater Houston 730 N Post Oak Rd Houston, TX 77024	76-0318261	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(113) YMCA of Central Maryland Inc dba The Y in Central Maryland 303 W Chesapeake Avenue Baltimore, MD 21204	52-0591699	501(c)(3)	300,000	0			Grant to support AARP Foundation's Experience Corps program
(114) Tri-County Urban League Inc 317 S Macarthur Hwy Peoria, IL 61605	37-0888235	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(115) University of Southern California 3500 South Figueroa St Ste 102 Los Angeles, CA 90089	95-1642394	501(c)(3)	110,000	0			Grant to support AARP Foundation's Benefits program
(116) United Way of the Bay Area 550 Kearny Street San Francisco, CA 94108	94-1312348	501(c)(3)	200,000	0			Grant to support AARP Foundation's Tax and Credit program
(117) United Way Tucson and Southern Arizona 330 North Commerce Park Loop Tucson, AZ 85745	86-0098932	501(c)(3)	100,289	0			Grant to support AARP Foundation's Benefits program
(118) University of Washington 1107 NE 45th Street Suite 400 Seattle, WA 98105	91-6001537	Govt. entity	19,323	0			Grant to support AARP Foundation's Social Connection program
(119) Urban League of Greater Atlanta 229 Peachtree St NE Ste 300 Atlanta, GA 30303	58-0593386	501(c)(3)	9,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ & Work for Yourself 50+ programs
(120) Women Are Dreamers Too PO Box 1371 Alpharetta, GA 30009	52-2288027	501(c)(3)	10,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(121) Worklife Ministries Inc 1900 Saint James Place Ste 880 Houston, TX 77056	76-0312087	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(122) YMCA of El Paso 810 Wyoming Avenue El Paso, TX 79902	74-1109880	501(c)(3)	20,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program
(123) Youth Co-Op Inc 3525 NW 7th Street Miami, FL 33125	23-7320351	501(c)(3)	70,000	0			Grant to support AARP Foundation's Back to Work 50+ program
(124) YWCA Metropolitan Chicago 1 N Lasalle Street Ste 1150 Chicago, IL 60602	36-2179765	501(c)(3)	8,000	0			Grant to support AARP Foundation's Digital Skills Ready @ 50+ Workforce program

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . ▶ 122

3 Enter total number of other organizations listed in the line 1 table . . . ▶ 2

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

(a) Type of grant or assistance	**(b)** Number of recipients	**(c)** Amount of cash grant	**(d)** Amount of noncash assistance	**(e)** Method of valuation (book, FMV, appraisal, other)	**(f)** Description of noncash assistance
(1) SCSEP Enrollee wages and benefits	10625	65,236,850			
(2) Experience Corps mentoring & tutoring stipends	85	272,739			
(3) Employee and Enrollee disaster recovery	3	13,975			
(4) Save Your Refund promotion	3	15,000			
(4)					
(5)					
(6)					
(7)					

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

Return Reference	Explanation
Part I, Line 2:	AARP Foundation has written grant agreements in place with financial and programmatic reporting requirements. The reports are reviewed and final payments are not made until all work has been completed.

Additional Data

Return to Form

Software ID:

Software Version:

Schedule J
(Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. ☐ First-class or charter travel ☐ Housing allowance or residence for personal use ☐ Travel for companions ☐ Payments for business use of personal residence ☐ Tax idemnification and gross-up payments ☐ Health or social club dues or initiation fees ☐ Discretionary spending account ☐ Personal services (e.g., maid, chauffeur, chef)			
b	If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	**1b**		
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?	**2**		
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III. ☐ Compensation committee ☐ Written employment contract ☑ Independent compensation consultant ☑ Compensation survey or study ☐ Form 990 of other organizations ☑ Approval by the board or compensation committee			
4	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:			
a	Receive a severance payment or change-of-control payment?	**4a**		No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.	**4c**		No
	Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:			
a	The organization?	**5a**	Yes	
b	Any related organization? . . . . If "Yes," on line 5a or 5b, describe in Part III.	**5b**	Yes	
6	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:			
a	The organization?	**6a**		No
b	Any related organization? . . . . If "Yes," on line 6a or 6b, describe in Part III.	**6b**		No
7	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		No
8	Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	**8**		No
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	**9**		

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

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

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

(A) Name and Title		**(B)** Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC			**(C)** Retirement and other deferred compensation	**(D)** Nontaxable benefits	**(E)** Total of columns (B)(i)-(D)	**(F)** Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	**(ii)** Bonus & incentive compensation	**(iii)** Other reportable compensation				
1 Patricia D Shannon CFO & Senior Vice President	**(i)**	359,986	82,422	7,654	12,200	14,776	477,038	0
	(ii)	0	0	0	52,948	0	52,948	0
2 David Whitehead SVP & Chief Development Officer	**(i)**	303,377	69,663	7,703	12,200	15,978	408,921	0
	(ii)	11,695	0	0	52,948	0	64,643	0
3 Emily S Allen - SVP Programs & Interim Pres. (as of 6/10/22)	**(i)**	288,599	66,025	7,515	12,200	9,205	383,544	0
	(ii)	0	0	0	52,948	0	52,948	0
4 Lisa Marsh Ryerson President (until 6/10/22)	**(i)**	179,783	114,746	40,221	11,899	8,758	355,407	0
	(ii)	2,933	0	0	51,640	0	54,573	0
5 William A Rivera SVP - Litigation	**(i)**	252,008	60,242	5,323	12,200	1,375	331,148	0
	(ii)	14,289	0	0	52,948	0	67,237	0
6 Jami Wyatt Secretary	**(i)**	0	0	0	0	0	0	0
	(ii)	249,113	53,852	4,666	64,713	23,740	396,084	0
7 Demerios Antzoulatos VP - Finance, Grants, & Operations	**(i)**	229,762	56,564	4,741	11,453	23,640	326,160	0
	(ii)	0	0	0	49,706	0	49,706	0
8 Stephen Venute VP - Corp & Fdn Relations	**(i)**	227,394	49,587	5,979	11,079	8,302	302,341	0
	(ii)	0	0	0	48,084	0	48,084	0
9 Patrick Landers VP - Strategy & Innovation	**(i)**	223,612	47,989	4,597	10,864	15,661	302,723	0
	(ii)	0	0	0	47,150	0	47,150	0
10 Marc McDonald VP - Integration	**(i)**	216,490	47,590	4,795	10,563	17,609	297,047	0
	(ii)	0	0	0	45,844	0	45,844	0
11 Steven Delvecchio VP - Direct Response	**(i)**	223,125	48,657	6,256	10,871	1,156	290,065	0
	(ii)	0	0	0	47,181	0	47,181	0

Part III Supplemental Information

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

Return Reference	Explanation
Part I, Line 1A:	All non-employee officers and directors for AARP Foundation serve on a volunteer basis and are not compensated for their generous commitment to AARP Foundation. The officers, directors, and key employees are reimbursed by AARP Foundation for travel and subsistence costs incurred in carrying out their duties. Board members Libby Sartain, Robert Blancato, and Margo James Copeland sit on both The AARP, Inc. board and the AARP Foundation board. AARP, Inc. pays all spouse/companion travel expenses for these board members and issues the required 1099-MISC with the applicable income tax gross-up payment.
Part I, Line 5:	AARP Foundation participates in AARP's enterprise-wide compensation plan. Under that compensation plan, numerous organizational factors are considered in employee compensation, one of which is gross revenue.

Additional Data

Return to Form

Software ID:
Software Version:

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

Schedule K (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information on Tax-Exempt Bonds

▶ Complete if the organization answered "Yes" to Form 990, Part VI, line 24a. Provide descriptions, explanations, and any additional information in Part VI.
▶ Attach to Form 990.
▶Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

Part I Bond Issues

	(a) Issuer name	(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased Yes	(g) Defeased No	(h) On behalf of issuer Yes	(h) On behalf of issuer No	(i) Pool financing Yes	(i) Pool financing No
A	District of Columbia	53-6001131	254839H48	10-21-2004	25,000,000	Purchase of Office Space		X		X		X

Part II Proceeds

		A		B		C		D	
1	Amount of bonds retired								
2	Amount of bonds legally defeased								
3	Total proceeds of issue	25,000,000							
4	Gross proceeds in reserve funds								
5	Capitalized interest from proceeds								
6	Proceeds in refunding escrows								
7	Issuance costs from proceeds								
8	Credit enhancement from proceeds								
9	Working capital expenditures from proceeds								
10	Capital expenditures from proceeds	23,688,767							
11	Other spent proceeds	1,311,233							
12	Other unspent proceeds								
13	Year of substantial completion								
		Yes	No	Yes	No	Yes	No	Yes	No
14	Were the bonds issued as part of a current refunding issue of tax-exempt bonds (or, if issued prior to 2020, a current refunding issue)?		X						
15	Were the bonds issued as part of an advance refunding issue of taxable bonds (or, if issued prior to 2020, an advance refunding issue)?		X						
16	Has the final allocation of proceeds been made?	X							
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?	X							

Part III Private Business Use

		A Yes	A No	B Yes	B No	C Yes	C No	D Yes	D No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?		X						
2	Are there any lease arrangements that may result in private business use of bond-financed property?		X						
3a	Are there any management or service contracts that may result in private business use of bond-financed property?		X						
b	If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?								
c	Are there any research agreements that may result in private business use of bond-financed property?		X						
d	If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?								
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government . . . . ▶	0.600 %							
5	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government . . . . ▶								
6	Total of lines 4 and 5	0.600 %							
7	Does the bond issue meet the private security or payment test? . . .		X						
8a	Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued?.		X						
b	If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of. . .								
c	If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2?								
9	Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2?.		X						

Part IV Arbitrage

		A Yes	A No	B Yes	B No	C Yes	C No	D Yes	D No
1	Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate? . . .		X						
2	If "No" to line 1, did the following apply?								
a	Rebate not due yet?		X						
b	Exception to rebate?		X						
c	No rebate due?		X						
	If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed								
3	Is the bond issue a variable rate issue?	X							

Part IV Arbitrage (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
4a	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X						
b	Name of provider								
c	Term of hedge								
d	Was the hedge superintegrated?								
e	Was the hedge terminated?								
5a	Were gross proceeds invested in a guaranteed investment contract (GIC)?		X						
b	Name of provider								
c	Term of GIC								
d	Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?								
6	Were any gross proceeds invested beyond an available temporary period?		X						
7	Has the organization established written procedures to monitor the requirements of section 148? . . .		X						

Part V Procedures To Undertake Corrective Action

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?	X							

Part VI Supplemental Information. Provide additional information for responses to questions on Schedule K. (See instructions).

Return Reference	Explanation

Additional Data

Return to Form

Software ID:
Software Version:

Schedule L (Form 990)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

▶ Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.
▶ Attach to Form 990 or Form 990-EZ.
▶Go to www.irs.gov/Form990 for instructions and the latest information.

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Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number

52-0794300

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and section 501(c)(29) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1 (a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected? Yes	No

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

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

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No
Total . . . . ▶ $												

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance

Part IV Business Transactions Involving Interested Persons.

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

(a) Name of interested person	**(b)** Relationship between interested person and the organization	**(c)** Amount of transaction	**(d)** Description of transaction	**(e)** Sharing of organization's revenues?	
				Yes	**No**
(1) AARP Inc	Affiliated entity	4,248,912	Grants for performance of charitable activities on behalf of AARP Foundation		No

Part V Supplemental Information

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

Return Reference	Explanation

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE O (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047
2022
Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	AARP Foundation made the following changes to it Bylaws or other governing documents in 2022: 1. The AARP Foundation Bylaws were amended to allow the Foundation President to be eligible for election to the AARP Foundation Board as an "Unaffiliated" (non-AARP Board Member) Director. 2. The maximum numbers of directors was increased to 11 to accommodate the addition of the President to the Board. 3. The President is not subject to a limitation on number of terms; however, the President's membership on the Board ends when the President no longer serves as President of AARP Foundation. 4. The Foundation Board also adopted a policy to govern conflicts of interest, real or perceived, governing the Foundation President's service on the Board and excludes the President from votin on the election of directors and board leaders; and matters concerning the President, including the President's compensation. 5. When the President is prohibited from voting, the determination of a quorum, the outcome of any votes, and the unanimous consents will not count the President's position in making such determinations. 6. The President is prohibited from serving as a board leader. 7. The President is prohibited from serving on a committee unless the committee's charter allows for such service.
Form 990, Part VI, Section A, line 7a	The AARP Board of Directors appoints up to eleven voting members of the AARP Foundation Board of Directors. Up to four of the AARP Foundation board members may be current members of the AARP Board. The remaining board members shall be unaffiliated with AARP.
Form 990, Part VI, Section A, line 7b	The AARP Board of Directors appoints up to eleven voting members of the AARP Foundation Board of Directors. Up to four of the AARP Foundation board members may be current AARP board members. The remaining board members shall be unaffiliated with AARP. An AARP Foundation board member may be removed, with or without cause, by formal action of the AARP Foundation Board or the AARP Board, and a successor shall be appointed in accordance to the process described in the bylaws. The AARP Foundation bylaws provide that no amendments to the bylaws adopted by the Foundation may take effect until approved by the AARP Board of Directors.
Form 990, Part VI, Section B, line 11b	The AARP Foundation Form 990 is prepared by AARP's internal tax department and reviewed by the Foundation's CFO and other internal reviewers. The Form 990 is then provided to the Board of Directors. Once all reviews are complete, the return is electronically filed with the Internal Revenue Service.
Form 990, Part VI, Section B, line 12c	Annually, all board members and employees (including officers) are required to review the code of conduct, formally acknowledge their understanding of the code, and disclose any real or potential conflicts of interest. Disclosures are reviewed by appropriate management (or in the case of a board member, the Board Chair, and if necessary, the Board of Directors), and the Ethics & Compliance Office. The appropriate mitigation plan is implemented (for example, recusal from participating in any deliberations and decisions relevant to the disclosure). The Ethics & Compliance Office monitors compliance with these requirements and ensures proper follow-up as needed.
Form 990, Part VI, Section B, line 15a	Through its shared services agreement with AARP, AARP Foundation participates in AARP's enterprise-wide compensation reviews. AARP has a competitive position in the marketplace that considers relevant for-profit and not-for-profit data since this is the landscape in which AARP and its affiliates compete for talent. Establishing the appropriate compensation for positions and jobs considers external market pricing (where possbile) from an independent, third party compensation consulting firm, internal criteria is based on a standard approach that measures the internal value of positions, including: complexity and scope of responsibility, skill set and competencies, education and experience, and the reporting relationship of the position. An individual's actual performance and contribution is measured through AARP's performance management approach and then rewarded through AARP's annual base pay merit and incentive award programs. This process applies to all employees of the Foundation including the President, CFO, and key employees. The AARP Foundation Board Governance Committee provides input to the CEO of AARP on the President's performance and compensation based on the AARP Foundation Board Goverance Committee's evaluation of the President's performance, and the AARP CEO then recommends adjustments to the President's compensation package to the AARP Foundation Board. The AARP Foundation Board provides final approval over any adjustments to the President's compensation package.
Form 990, Part VI, Section C, line 19	AARP Foundation makes its Form 990 and audited financial statements available for public inspection on its website and upon request to the AARP Foundation's Office of the CFO.
Form 990, Part VII, Section A	Officers, Key Employees, and Highest Compensated Employees: AARP Foundation has a standard 40 hour work week and the average hours are disclosed on Form 990. Officers, key employees, and highest compensated employees often work in excess of that amount.

Additional Data

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Software ID:

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SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization
AARP Foundation

Employer identification number
52-0794300

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

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	No
(1) AARP (consolidated) 601 E Street NW Washington, DC 20049 95-1985500	Social welfare organization dedicated to persons over age 50	DC	501(c)(4)	N/A	N/A		No
(2) Legal Counsel for the Elderly 601 E Street NW Washington, DC 20049 52-1194741	Public charity providing legal assistance/education to DC elderly residents	DC	501(c)(3)	509(A)(1)	AARP		No
(3) AARP Insurance Plan 601 E Street NW Washington, DC 20049 52-6069387	Grantor trust holding certain AARP group health insurance policies	DC	501(c)(4)	N/A	AARP		No
(4) Wish of a Lifetime 303 East 17th Avenue Ste 850 Denver, CO 80203 26-2123649	Shift how society values seniors by granting/sharing lifelong wishes	CO	501(c)(3)	509(A)(1)	AARP		No
(5) Older Adults Technology Services 168 7th Street Ste 3A Brooklyn, NY 11215 55-0882599	Harness the power of technology to change the way we age	NY	501(c)(3)	509(A)(1)	AARP		No
(6) AARP Foundation Trust co BlackRock Institutional Trust Company NA TTE 400 Howard Street San Francisco, CA 94105 30-6645385	Grantor trust holding certain exchange traded funds in investment	CA	501(c)(3)	509(A)(1)	AARP Foundation		No

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

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

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

(a) Name, address, and EIN of related organization	**(b)** Primary activity	**(c)** Legal domicile (state or foreign country)	**(d)** Direct controlling entity	**(e)** Type of entity (C corp, S corp, or trust)	**(f)** Share of total income	**(g)** Share of end-of-year assets	**(h)** Percentage ownership	**(i)** Section 512(b)(13) controlled entity?	
								Yes	**No**
(1)AARP Financial Services Corporation 601 E Street NW Washington, DC 20049 52-1367607	Real estate holding company	DE	AARP	C					No
(2)AARP Services Inc (consolidated) 620 F Street NW Washington, DC 20004 52-2141065	Qualtiy control and research	DE	AARP	C					No
(3) The H Wayne and Anne D Barbetti Charitable Remainder Unitrust 5011 Haven Avenue Ocean City, NJ 08226 20-6379297	Charitable remainder trust	NJ	N/A	T					No

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

			Yes	No
	Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.			
1	During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a	Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity	1a		No
b	Gift, grant, or capital contribution to related organization(s)	1b	Yes	
c	Gift, grant, or capital contribution from related organization(s)	1c	Yes	
d	Loans or loan guarantees to or for related organization(s)	1d		No
e	Loans or loan guarantees by related organization(s)	1e	Yes	
f	Dividends from related organization(s)	1f		No
g	Sale of assets to related organization(s)	1g		No
h	Purchase of assets from related organization(s)	1h		No
i	Exchange of assets with related organization(s)	1i		No
j	Lease of facilities, equipment, or other assets to related organization(s)	1j		No
k	Lease of facilities, equipment, or other assets from related organization(s)	1k		No
l	Performance of services or membership or fundraising solicitations for related organization(s)	1l		No
m	Performance of services or membership or fundraising solicitations by related organization(s)	1m	Yes	
n	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	Yes	
o	Sharing of paid employees with related organization(s)	1o		No
p	Reimbursement paid to related organization(s) for expenses	1p	Yes	
q	Reimbursement paid by related organization(s) for expenses	1q	Yes	
r	Other transfer of cash or property to related organization(s)	1r	Yes	
s	Other transfer of cash or property from related organization(s)	1s		No

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

(a) Name of related organization	**(b)** Transaction type (a-s)	**(c)** Amount involved	**(d)** Method of determining amount involved
(1) AARP Inc - grant awards for performance of charitable activities	B	4,248,912	Grant agreements
(2) AARP Inc	C	3,491,859	Cash contributions
(3) AARP Inc - bond standby agreement	E	25,000,000	In the event of default
(4) AARP Inc - in-kind advertising	M	5,647,022	Publication space market value
(5) AARP Inc - in-kind shared services	M	25,855,489	Allocable cost
(6) AARP Inc - in-kind rent	N	60,496	See supplemental information
(7) AARP Inc - mailing lists	N	0	See supplemental information
(8) AARP Inc - maintenance	P	881,448	Costs incurred
(9) AARP Inc - employee salary	Q	417,211	Actual salary for time reported
(10) AARP Inc - 25k annual fee line of credit	R	25,000	Cash paid
(11) Andrus Insurance Fund Inc - workers' comp & other insurance	R	2,516,079	Premiums paid
(12) AARP Services Inc	C	2,250	Cash contributions
(13) Older Adults Technology Services	B	1,800,000	Grant agreement

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

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

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

Part VII **Supplemental Information**

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

Return Reference	Explanation
Schedule R, Part V, Line 2(A)(7)	AARP Foundation and AARP, its parent organziation, share mailing lists. AARP does not rent its mailing list to other organizations, so a fair market value of the benefit to the Foundation has not been established. The AARP list is much larger and thus presumably more valuable than the Foundation list. Moreover, the vast majority of names on the AARP Foundation list are already on the AARP list, as they are also AARP members.

Additional Data

Return to Form

Software ID:
Software Version: