

EXTENSION GRANTED TO MAY 15, 2017

Form **990**Department of the Treasury
Internal Revenue Service**Return of Organization Exempt From Income Tax**

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

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

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

OMB No. 1545-0047

2015Open to Public
InspectionA For the 2015 calendar year, or tax year beginning **JUL 1, 2015** and ending **JUN 30, 2016**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO		D Employer identification number 95-3641387
	Doing business as		E Telephone number 619-287-3054
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	G Gross receipts \$ 5,444,657.
	3547 ALTADENA AVENUE		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	City or town, state or province, country, and ZIP or foreign postal code SAN DIEGO, CA 92105		H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions)
F Name and address of principal officer: PATRICK GODDARD SAME AS C ABOVE			
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527			
J Website: HTTP://WWW.WALDORFSANDIEGO.ORG/			
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶			
L Year of formation: 1981 M State of legal domicile: CA			

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: MAKE WALDORF EDUCATION AVAILABLE TO ALL CHILDREN IN THE SAN DIEGO AREA.		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	13
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	13
	5 Total number of individuals employed in calendar year 2015 (Part V, line 2a)	5	93
	6 Total number of volunteers (estimate if necessary)	6	0
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b Net unrelated business taxable income from Form 990-T, line 34	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year 417,546.	Current Year 275,466.
	9 Program service revenue (Part VIII, line 2g)	4,069,831.	4,303,978.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	72.	203.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	140,608.	216,972.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	4,628,057.	4,796,619.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	591,459.	490,382.
	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)	2,764,396.	2,902,094.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 117,045.		
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	1,173,418.	1,147,583.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	4,529,273.	4,540,059.
19 Revenue less expenses. Subtract line 18 from line 12	98,784.	256,560.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 5,935,092.	End of Year 6,032,380.
	21 Total liabilities (Part X, line 26)	4,877,755.	4,718,483.
	22 Net assets or fund balances. Subtract line 21 from line 20	1,057,337.	1,313,897.

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
	PATRICK GODDARD, TREASURER Type or print name and title	
Paid Preparer Use Only	Print/Type preparer's name ANDREW J. OZUROVICH	Preparer's signature
	Firm's name ▶ THE OZUROVICH GROUP, INC. Firm's address ▶ 1901 AVENUE OF THE STARS #1050 LOS ANGELES, CA 90067	Date 5/31/17 Check if self-employed <input type="checkbox"/> PTIN P00736945 Firm's EIN ▶ 95-4502766 Phone no. (310) 226-7576

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

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Part III Statement of Program Service Accomplishments

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

- 1 Briefly describe the organization's mission:
487751 TO AWAKEN EACH STUDENT'S CAPACITY FOR LOVE OF LEARNING, FOR INDEPENDENT THINKING, AND FOR HEARTFELT SERVICE TO THE WORLD. MAKE WALDORF EDUCATION AVAILABLE TO ALL CHILDREN IN THE SAN DIEGO AREA THROUGH ACTIVE ENGAGEMENT WITH FAMILIES OF ALL ETHNIC, SPIRITUAL, AND
- 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 \$ **3,635,691.** including grants of \$ **490,382.**) (Revenue \$ **4,393,998.**)
K-12 EDUCATION. WALDORF SCHOOLS OFFER A DEVELOPMENTALLY APPROPRIATE, EXPERIENTIAL APPROACH TO EDUCATION. THEY INTEGRATE THE ARTS AND ACADEMICS FOR CHILDREN FROM PRESCHOOL THROUGH TWELFTH GRADE. THE AIM OF THE EDUCATION IS TO INSPIRE LIFE-LONG LEARNING IN EACH STUDENT AND ENABLE THEM TO FULLY DEVELOP THEIR UNIQUE CAPACITIES. FOUNDED IN GERMANY IN THE EARLY 20TH CENTURY, WALDORF EDUCATION IS AN INDEPENDENT AND INCLUSIVE FORM OF EDUCATION BASED ON THE INSIGHTS AND TEACHING OF RENOWNED ANTROPOSOPHIST, ARTIST, AND SCIENTIST, RUDOLF STEINER. EVOLVING FROM A PROFOUND UNDERSTANDING OF THE HUMAN SPIRIT AND HUMAN DEVELOPMENT, WALDORF EDUCATION IS REGIONALLY ADAPTIVE AND HAS GROWN TO INCLUDE HUNDREDS OF SCHOOLS WORLDWIDE. 270 STUDENTS IN ATTENDANCE IN 2014.
- 4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)
- 4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)
- 4d Other program services (Describe in Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)
- 4e Total program service expenses **3,635,691.**

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

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Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II		X
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	X	
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		
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		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	X	

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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 25		
b Enter the number of Forms W-2G included in 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 X	
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 93		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		2b X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?			3a X
b If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O			
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 X
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 X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			5b X
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			
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 X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			
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 X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?			
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c X
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?			
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			
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?			
9 Sponsoring organizations maintaining donor advised funds.			
a Did the sponsoring organization make any taxable distributions under section 4966?			
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			
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 X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		14b	

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

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

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	1a	13	
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.			
b Enter the number of voting members included in line 1a, above, who are independent	1b	13	
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		X
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		X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6 Did the organization have members or stockholders?	6		X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a The governing body?	8a	X	
b Each committee with authority to act on behalf of the governing body?	8b	X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		X

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

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

Section C. Disclosure

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

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☐ Own website ☐ Another's website ☒ 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: **►**
KIM GALVIN - 619-287-3054
3547 ALTADENA AVENUE, SAN DIEGO, CA 92105

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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 line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Sub-total								294,072.	0.	0.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								294,072.	0.	0.

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 0

	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	X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual	4	X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person	5	X

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

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 0

**ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

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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 Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c	20,502.				
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	254,964.				
	g Noncash contributions included in lines 1a-1f: \$						
	h Total. Add lines 1a-1f			275,466.			
Program Service Revenue	2 a TUITION	Business Code	611710	3,908,319.	3,908,319.		
	b FIELD TRIP REVENUE		611710	192,343.	192,343.		
	c SCHOOL FEES		611710	135,426.	135,426.		
	d EXTENDED CARE		611710	67,890.	67,890.		
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f			4,303,978.			
	Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			203.		
4 Income from investment of tax-exempt bond proceeds							
5 Royalties							
6 a Gross rents		(i) Real	52,760.				
b Less: rental expenses		(ii) Personal	1,957.				
c Rental income or (loss)			50,803.				
d Net rental income or (loss)				50,803.			50,803.
7 a Gross amount from sales of assets other than inventory		(i) Securities					
b Less: cost or other basis and sales expenses		(ii) Other					
c Gain or (loss)							
d Net gain or (loss)							
8 a Gross income from fundraising events (not including \$ 20,502. of contributions reported on line 1c). See Part IV, line 18		a	122,217.				
b Less: direct expenses		b	46,068.				
c Net income or (loss) from fundraising events				76,149.			76,149.
9 a Gross income from gaming activities. See Part IV, line 19		a					
b Less: direct expenses	b						
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	a	689,723.					
b Less: cost of goods sold	b	600,013.					
c Net income or (loss) from sales of inventory			89,710.	89,710.			
Miscellaneous Revenue			Business Code				
11 a MISCELLANEOUS		611710	310.	310.			
b							
c							
d All other revenue							
e Total. Add lines 11a-11d			310.				
12 Total revenue. See instructions.			4,796,619.	4,393,998.	0.	127,155.	

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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 ☐

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.				
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...				
2 Grants and other assistance to domestic individuals. See Part IV, line 22	490,382.	490,382.		
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				
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	2,458,631.	2,010,804.	373,526.	74,301.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	235,010.	192,204.	35,704.	7,102.
10 Payroll taxes	208,453.	170,484.	31,669.	6,300.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	16,743.		16,743.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	18,714.		18,714.	
12 Advertising and promotion	8,214.		8,214.	
13 Office expenses	8,796.		8,796.	
14 Information technology				
15 Royalties				
16 Occupancy	221,951.	171,222.	50,729.	
17 Travel	7,954.	7,954.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	166,213.	116,349.	49,864.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	142,871.	114,297.	28,574.	
23 Insurance	67,332.		67,332.	
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 <u>FIELD TRIPS AND CLASSRO</u>	194,910.	194,910.		
b <u>CLASSROOM SUPPLIES</u>	101,098.	101,098.		
c <u>BAD DEBT EXPENSES</u>	31,868.		31,868.	
d <u>PROFESSIONAL DEVELOPMEN</u>	30,537.	30,537.		
e All other expenses	130,382.	35,450.	65,590.	29,342.
25 Total functional expenses. Add lines 1 through 24e	4,540,059.	3,635,691.	787,323.	117,045.
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)

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Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	243,789.	1	341,718.
	2 Savings and temporary cash investments	201,719.	2	201,921.
	3 Pledges and grants receivable, net	94,112.	3	52,424.
	4 Accounts receivable, net	50,847.	4	28,046.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use	73,170.	8	85,392.
	9 Prepaid expenses and deferred charges		9	235.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	6,068,943.		
	b Less: accumulated depreciation	835,006.		
		5,223,889.	10c	5,233,937.
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	47,566.	15	88,707.	
16 Total assets. Add lines 1 through 15 (must equal line 34)	5,935,092.	16	6,032,380.	
Liabilities	17 Accounts payable and accrued expenses	105,732.	17	115,061.
	18 Grants payable		18	
	19 Deferred revenue	510,069.	19	443,740.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties	4,244,808.	23	4,142,516.
	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	17,146.	25	17,166.
	26 Total liabilities. Add lines 17 through 25	4,877,755.	26	4,718,483.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	840,349.	27	1,099,195.
	28 Temporarily restricted net assets	216,988.	28	214,702.
	29 Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	1,057,337.	33	1,313,897.
	34 Total liabilities and net assets/fund balances	5,935,092.	34	6,032,380.

Form 990 (2015)

**ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Form 990 (2015)

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Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,796,619.
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,540,059.
3	Revenue less expenses. Subtract line 2 from line 1	3	256,560.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	1,057,337.
5	Net unrealized gains (losses) on investments	5	
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 33, column (B))	10	1,313,897.

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: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	2a	X
b	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	2b	X
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	2c	X
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	X
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	

Form **990** (2015)

SCHEDULE A
(Form 990 or 990-EZ)

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.

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

OMB No. 1545-0047

2015

Open to Public
Inspection

Name of the organization **ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Employer identification number
95-3641387

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

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

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☒ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
- 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 1-9 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						

ASSOCIATION FOR WALDORF EDUCATION

Schedule A (Form 990 or 990-EZ) 2015 IN SAN DIEGO

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Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge ...						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources ...						
9 Net income from unrelated business activities, whether or not the business is regularly carried on ...						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2015 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2014 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2015. 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		<input type="checkbox"/>
b 33 1/3% support test - 2014. 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		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2015. 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		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2014. 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		<input type="checkbox"/>
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		<input type="checkbox"/>

Schedule A (Form 990 or 990-EZ) 2015

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(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) 2011	(b) 2012	(c) 2013	(d) 2014	(e) 2015	(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 in 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 five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2015 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2014 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2015 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2014 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2015. 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 - 2014. 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

ASSOCIATION FOR WALDORF EDUCATION

Schedule A (Form 990 or 990-EZ) 2015 **IN SAN DIEGO**

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Part IV Supporting Organizations

(Complete only if you checked a box in line 11 on Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d 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.		
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).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.		
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.		
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.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked 11a or 11b in Part I, answer (b) and (c) below.		
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.		
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.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) 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).		
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?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
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.		
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 or 990-EZ).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
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.		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI.		
c Did a disqualified person (as defined in 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.		
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 10b below.		
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.)		

ASSOCIATION FOR WALDORF EDUCATION

Schedule A (Form 990 or 990-EZ) 2015 **IN SAN DIEGO**

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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 in (b) and (c) below, the governing body of a supported organization?	11a	
b A family member of a person described in (a) above?	11b	
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.	11c	

Section B. Type I Supporting Organizations

	Yes	No
1 Did the 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 (2), 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 <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below. b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below. c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test. Answer (a) and (b) below.		
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 in (a) 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 (a) and (b) 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? 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	

ASSOCIATION FOR WALDORF EDUCATION

Schedule A (Form 990 or 990-EZ) 2015 IN SAN DIEGO

95-3641387 Page 6

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. 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):			
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 1-1/2% 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 .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 <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).			

Schedule A (Form 990 or 990-EZ) 2015

ASSOCIATION FOR WALDORF EDUCATION

Schedule A (Form 990 or 990-EZ) 2015 **IN SAN DIEGO**

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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	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 Total annual distributions. Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2015 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2015	(iii) Distributable Amount for 2015
1 Distributable amount for 2015 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2015 (reasonable cause required-see instructions)			
3 Excess distributions carryover, if any, to 2015:			
a			
b			
c			
d From 2013			
e From 2014			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2015 distributable amount			
i Carryover from 2010 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2015 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2015 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2015, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).			
6 Remaining underdistributions for 2015. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).			
7 Excess distributions carryover to 2016. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a			
b			
c Excess from 2013			
d Excess from 2014			
e Excess from 2015			

Schedule A (Form 990 or 990-EZ) 2015

Schedule A (Form 990 or 990-EZ) 2015 IN SAN DIEGO

Part VI

(See instructions.)

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2015

Name of the organization

**ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Employer identification number

95-3641387

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (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 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 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. Do not 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 is not covered by the General Rule and/or the Special Rules does not 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization
**ASSOCIATION FOR WALDORF EDUCATION
 IN SAN DIEGO**

Employer identification number

95-3641387**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
1		\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 12,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 6,600.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO	Employer identification number 95-3641387
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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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO

95-3641387

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 info. once.) \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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.

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

OMB No. 1545-0047

2015
Open to Public
Inspection

Name of the organization **ASSOCIATION FOR WALDORF EDUCATION**
IN SAN DIEGO

Employer identification number
95-3641387

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

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

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).
☐ Preservation of land for public use (e.g., recreation or education) ☐ Preservation of a 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 Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06, 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 SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) 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 SFAS 116 (ASC 958) relating to these items:

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

▶ \$

b Assets included in Form 990, Part X

▶ \$

ASSOCIATION FOR WALDORF EDUCATION

Schedule D (Form 990) 2015

IN SAN DIEGO

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

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

(check all that apply):

a ☐ Public exhibitiond ☐ Loan or exchange programsb ☐ Scholarly researche ☐ Other _____c ☐ Preservation for future generations

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

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

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

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

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ Nob If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

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

a Board designated or quasi-endowment ☐ %b Permanent endowment ☐ %c Temporarily restricted 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:

(i) unrelated organizations

(ii) related organizations

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐

	Yes	No
3a(i)		
3a(ii)		
3b		

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

Part VI Land, Buildings, and Equipment.

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		1,553,796.		1,553,796.
b Buildings		4,245,437.	716,411.	3,529,026.
c Leasehold improvements				
d Equipment		45,393.	6,089.	39,304.
e Other		224,317.	112,506.	111,811.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				5,233,937.

Schedule D (Form 990) 2015

**ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Schedule D (Form 990) 2015

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Part VII Investments - Other Securities.

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

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

Part VIII Investments - Program Related.

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

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (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) ACCRUED LIABILITIES	17,166.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	
	17,166.

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 ☒

Schedule D (Form 990) 2015

ASSOCIATION FOR WALDORF EDUCATION

Schedule D (Form 990) 2015

IN SAN DIEGO

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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	4,954,275.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	648,038.
e	Add lines 2a through 2d	2e	648,038.
3	Subtract line 2e from line 1	3	4,306,237.
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	490,382.
c	Add lines 4a and 4b	4c	490,382.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	4,796,619.

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	4,697,715.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	648,038.
e	Add lines 2a through 2d	2e	648,038.
3	Subtract line 2e from line 1	3	4,049,677.
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	490,382.
c	Add lines 4a and 4b	4c	490,382.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	4,540,059.

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.

PART X, LINE 2:

THE SCHOOL HAS ADOPTED THE PROVISIONS OF ACCOUNTING STANDARDS CODIFICATION ("ASC") 740-10-05 RELATING TO ACCOUNTING AND REPORTING FOR UNCERTAINTY IN INCOME TAXES. FOR THE SCHOOL, THESE PROVISIONS COULD BE APPLICABLE TO INCURRANCE OF ANY UNRELATED BUSINESS INCOME ATTRIBUTABLE TO THE SCHOOL. BECAUSE OF THE SCHOOL'S GENERAL TAX-EXEMPT STATUS, ASC 740-10-05 IS NOT ANTICIPATED TO HAVE A MATERIAL IMPACT ON THE SCHOOL'S FINANCIAL STATEMENTS.

PART XI, LINE 2D - OTHER ADJUSTMENTS:**SPECIAL EVENTS EXPENSES****COST OF GOODS SOLD**532054
09-21-15

Schedule D (Form 990) 2015

Part XIII Supplemental Information (continued)RENTAL EXPENSESPART XI, LINE 4B - OTHER ADJUSTMENTS:GRANTS AND ASSISTANCEPART XII, LINE 2D - OTHER ADJUSTMENTS:SPECIAL EVENTS EXPENSESCOST OF GOODS SOLDRENTAL EXPENSESPART XII, LINE 4B - OTHER ADJUSTMENTS:GRANTS AND ASSISTANCE

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Schools

- **Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**
► **Attach to Form 990 or Form 990-EZ.**

OMB No. 1545-0047

2015

Open to Public Inspection

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

Name of the organization **ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Employer identification number
95-3641387

Part I

- 1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?
- 2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?
- 3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain.
If you need more space, use Part II

THE SCHOOL PUBLICIZES ITS RACIALLY NONDISCRIMINATORY POLICY THROUGH THE USE OF ITS SCHOOL WEBSITE.

- 4 Does the organization maintain the following?
- a Records indicating the racial composition of the student body, faculty, and administrative staff?
- b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? ...
- c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?
- d Copies of all material used by the organization or on its behalf to solicit contributions?
- If you answered "No" to any of the above, please explain. If you need more space, use Part II.

- 5 Does the organization discriminate by race in any way with respect to:

- a Students' rights or privileges?
- b Admissions policies?
- c Employment of faculty or administrative staff?
- d Scholarships or other financial assistance?
- e Educational policies?
- f Use of facilities?
- g Athletic programs?
- h Other extracurricular activities?

If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.

- 6a Does the organization receive any financial aid or assistance from a governmental agency?
- b Has the organization's right to such aid ever been revoked or suspended?
- If you answered "Yes" on either line 6a or line 6b, explain on Part II.

- 7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II

YES NO

1 X

2 X

3 X

4a X

4b X

4c X

4d X

5a X

5b X

5c X

5d X

5e X

5f X

5g X

5h X

6a X

6b X

7 X

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

Schedule E (Form 990 or 990-EZ) (2015)

ASSOCIATION FOR WALDORF EDUCATION

Schedule E (Form 990 or 990-EZ) (2015) IN SAN DIEGO

95-3641387 Page 2

Part II

Supplemental Information. Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable.

Also provide any other additional information.

Lined area for supplemental information.

Department of the Treasury
Internal Revenue Service

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

OMB No. 1545-0047

2015

Open to Public Inspection

Employer identification number
95-3641387

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.

- 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**

- 2 a** 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 ten 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?		(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
		Yes	No			
Total						

- 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.**

ASSOCIATION FOR WALDORF EDUCATION

Schedule G (Form 990 or 990-EZ) 2015 **IN SAN DIEGO**

95-3641387 Page 2

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	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))
		GALA EVENT (event type)	WINTER FAIRE (event type)	1 (total number)	
Revenue	1 Gross receipts	107,355.	20,754.	14,610.	142,719.
	2 Less: Contributions	10,590.	2,500.	7,412.	20,502.
	3 Gross income (line 1 minus line 2)	96,765.	18,254.	7,198.	122,217.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs	19,113.	618.		19,731.
	7 Food and beverages	715.	723.		1,438.
	8 Entertainment	2,200.			2,200.
	9 Other direct expenses	8,325.	7,280.	7,094.	22,699.
	10 Direct expense summary. Add lines 4 through 9 in column (d)				46,068.
	11 Net income summary. Subtract line 10 from line 3, column (d)				76,149.

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				
	2 Cash prizes				
Direct Expenses	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> 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: _____

ASSOCIATION FOR WALDORF EDUCATION

Schedule G (Form 990 or 990-EZ) 2015 **IN SAN DIEGO**

95-3641387 Page **3**

- 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 to be 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).

Part IV	Supplemental Information <i>(continued)</i>
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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.

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

OMB No. 1545-0047

2015

Open to Public
Inspection

Name of the organization **ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Employer identification number
95-3641387

Part I General Information on Grants and Assistance

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

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

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance

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

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

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

Schedule I (Form 990) (2015)

ASSOCIATION FOR WALDORF EDUCATION

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

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
TUITION ASSISTANCE	0	490,382.	0.	BOOK-COST OF TUITION	

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

PART I, LINE 2:

FINANCIAL AID IS BASED ON NEED. A TUITION MANAGEMENT COMPANY COLLECTS INFORMATION FROM THE FAMILIES SEEKING TUITION ASSISTANCE AND COMPILES FINANCIAL REPORTS. A TUITION ASSISTANCE COMMITTEE THEN REVIEWS THE REPORTS AND DETERMINES AWARDS.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or 990-EZ.

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

OMB No. 1545-0047

2015

Open to Public
Inspection

Name of the organization

**ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Employer identification number
95-3641387

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SOCIOECONOMIC BACKGROUNDS.

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

**FORM 990 IS REVIEWED BY THE FINANCE COMMITTEE, COMPRISED OF AT LEAST ONE
BOARD MEMBER, AND IS ALSO REVIEWED BY BUSINESS STAFF AT THE SCHOOL SITE.
ONCE THE REVIEW IS COMPLETE, IT IS PROVIDED TO THE ENTIRE BOARD IN A BOARD
MEETING.**

FORM 990, PART VI, SECTION B, LINE 12C:

**THE SCHOOL MONITORS AND ENFORCES ITS CONFLICTS OF INTEREST POLICY BY THE
FORM OF DISCUSSION/QUESTIONING DURING BOARD MEETINGS AND GROUP MEETINGS.**

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

**COMPENSATION OF OFFICERS, MANAGEMENT, AND KEY EMPLOYEES IS DETERMINED BY
THE BOARD OF DIRECTORS BASED UPON AVAILABILITY OF FUNDS AND COMPARABLE
SALARIES IN THE AREA. THE BOARD HAS CURRENTLY ESTABLISHED A Payscale BASED
UPON COMPARABLE SALARIES IN THE AREA.**

FORM 990, PART VI, SECTION C, LINE 18:

THE SCHOOL MAKES IT'S DOCUMENTS AVAILABLE FOR INSPECTION UPON REQUEST.

FORM 990, PART VI, SECTION C, LINE 19:

AVAILABLE UPON REQUEST

FORM 990, PART XII, LINE 2C:

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.
532211
09-02-15

Schedule O (Form 990 or 990-EZ) (2015)

Name of the organization **ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO**

Employer identification number
95-3641387

THE SCHOOL HAS NOT CHANGED ITS OVERSIGHT PROCESS.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	FURNITURE & FIXTURES											
5	2ND GRADE CHAIRS	082505	SL	5.00	16	1,496.			1,496.	1,496.		0.
6	PHONE SYSTEM	082505	SL	10.00	16	3,250.			3,250.	3,250.		0.
7	PHONE UPGRADE	091305	SL	10.00	16	1,467.			1,467.	1,467.		0.
8	PHONE UPGRADE	100305	SL	10.00	16	2,250.			2,250.	2,250.		0.
9	AUDITORIUM BENCHES	013006	SL	5.00	16	1,000.			1,000.	1,000.		0.
10	BIRCH EURHMY FLOOR	061406	SL	20.00	16	20,493.			20,493.	9,221.		1,025.
11	OFFICE RE-CARPET	062306	SL	5.00	16	1,441.			1,441.	1,441.		0.
25	SEA CARGO CONTAINER	072306	SL	5.00	16	800.			800.	800.		0.
26	FURNITURE& KITCHEN SUPPLIES	081406	SL	5.00	16	1,368.			1,368.	1,368.		0.
27	AUDITORIUM FOLDING CHAIRS	090606	SL	5.00	16	592.			592.	592.		0.
28	TABLE	091406	SL	5.00	16	790.			790.	790.		0.
29	3 CABINETS	091906	SL	5.00	16	1,200.			1,200.	1,200.		0.
30	38 CHAIRS	091906	SL	5.00	16	1,900.			1,900.	1,900.		0.
31	CHAIRS	092806	SL	5.00	16	3,019.			3,019.	3,019.		0.
32	FAST SIGNS	092806	SL	5.00	16	800.			800.	800.		0.
33	CHALKBOARDS	092806	SL	5.00	16	1,258.			1,258.	1,258.		0.
34	LIVE WIRE COMMUNICATIONS	100406	SL	10.00	16	1,298.			1,298.	1,168.		130.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
35	BENCHES	101006	SL	5.00	16	790.			790.	790.		0.
36	FAST SIGNS	110306	SL	5.00	16	1,394.			1,394.	1,394.		0.
37	COMPUTERS	022707	SL	5.00	16	1,608.			1,608.	1,608.		0.
38	WEBSITE	033007	SL	5.00	16	4,150.			4,150.	4,150.		0.
56	WEBSITE	073107	SL	5.00	16	1,490.			1,490.	1,490.		0.
57	NEW CHAIRS/TABLES	080607	SL	5.00	16	3,446.			3,446.	3,446.		0.
58	CHAIRS	080607	SL	5.00	16	2,621.			2,621.	2,621.		0.
59	TRAKWARE INC	120707	SL	5.00	16	3,363.			3,363.	3,363.		0.
60	SWING SET	101207	SL	5.00	16	701.			701.	701.		0.
61	SPACE ARCH	013008	SL	5.00	16	1,450.			1,450.	1,450.		0.
62	TRAKWARE INC	042808	SL	5.00	16	2,435.			2,435.	2,435.		0.
97	DISCOUNT SCHOOL	092309	SL	5.00	16	2,135.			2,135.	2,135.		0.
113	FENCE EXPANSION	073010	SL	10.00	16	1,900.			1,900.	1,140.		190.
114	SCIENCE TABLE	081310	SL	5.00	16	5,064.			5,064.	5,064.		0.
115	11 WOODEN CHAIRS	091010	SL	5.00	16	1,854.			1,854.	1,854.		0.
116	8 STUDENT DESKS	091010	SL	5.00	16	960.			960.	960.		0.
117	EQUIPMENT	092710	SL	5.00	16	1,689.			1,689.	1,689.		0.
118	BIZCHAIR FURNITURE	101110	SL	5.00	16	552.			552.	552.		0.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
119	DELL IT	101110	SL	5.00	16	2,040.			2,040.	2,040.		0.
120	EQUIPMENT	011211	SL	5.00	16	2,375.			2,375.	2,375.		0.
121	TABLE/BECH	030311	SL	5.00	16	601.			601.	601.		0.
122	STACKING CHAIRS	030311	SL	5.00	16	796.			796.	796.		0.
125	WASHER/DRYER	111312	SL	5.00	16	1,346.			1,346.	718.		269.
126	CIRCULAR SAW	030713	SL	5.00	16	678.			678.	317.		136.
129	ASUS H61M-PLUS DESTOP	082813	SL	5.00	16	2,422.			2,422.	925.		484.
130	CHAIRS COLINA CAMPUS	081213	SL	5.00	16	951.			951.	380.		190.
131	FOLDING CHAIRS - COLINA CAMPUS	081213	SL	5.00	16	799.			799.	319.		160.
132	CHALKBOARDS -- COLINA CAMPUS	081213	SL	5.00	16	979.			979.	392.		196.
133	ACER ASPIRE -- V5471P	090313	SL	5.00	16	789.			789.	301.		158.
134	PRINTER	100913	SL	5.00	16	809.			809.	294.		162.
135	SCANNER	110113	SL	5.00	16	475.			475.	164.		95.
136	WINTER FAIRE SUPPLIES	010114	SL	5.00	16	8,093.			8,093.	2,502.		1,619.
137	50 METAL FOLDING CHAIRS	012214	SL	5.00	16	688.			688.	200.		138.
138	50 METAL FOLDING CHAIRS	012214	SL	5.00	16	687.			687.	200.		137.
139	SCRIP PRINTER CREDIT CARD	030114	SL	5.00	16	325.			325.	89.		65.
140	TERMINAL	030314	SL	5.00	16	678.			678.	185.		136.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
141	WOODCREST CHAIR	061814	SL	5.00	16	151.			151.	33.		30.
148	CONTAINER	070114	SL	5.00	16	500.			500.	100.		100.
149	SOLAR EXPENDITURE	070114	SL	5.00	16	22,772.			22,772.	4,554.		3,073.
150	CABINETS	070914	SL	5.00	16	351.			351.	70.		70.
151	30 DESKES	071514	SL	5.00	16	6,105.			6,105.	1,119.		1,221.
152	CHAIRS FOR MUSIC ROOM	081114	SL	5.00	16	1,552.			1,552.	259.		310.
153	6 FOLDING TABLES	081314	SL	5.00	16	548.			548.	91.		110.
154	WARDROBS	081814	SL	5.00	16	952.			952.	159.		190.
155	USMARKER BOARD	082014	SL	5.00	16	547.			547.	91.		109.
156	TABLES & STOOLS	082214	SL	5.00	16	2,725.			2,725.	454.		545.
157	CLASSROOM FURNITURE	082314	SL	5.00	16	5,745.			5,745.	958.		1,149.
158	BLACKBOARDS	082714	SL	5.00	16	756.			756.	126.		151.
159	ASUS DESKTOP MOTHERBOARD	082914	SL	5.00	16	1,592.			1,592.	265.		318.
160	IKEA FURNITURE	083014	SL	5.00	16	470.			470.	78.		94.
161	FURNITURE & FIXTURE	090514	NC	.000		-226.			-226.			0.
162	12X12 COLEMAN TENT	091014	SL	5.00	16	580.			580.	87.		116.
163	FUJITSU SNAPSCAN SCANNER	091014	SL	5.00	16	968.			968.	145.		194.
164	DESKTOP MOTHERBOARD	120914	SL	5.00	16	2,511.			2,511.	251.		502.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
165	COMMERCIAL GRILL	121214	SL	5.00	16	400.			400.	40.		80.
166	COMPUTER HARDWARE & SOFTWARE	021715	SL	5.00	16	1,062.			1,062.	71.		212.
167	SECURITY CAMERA SYSTEMS	032715	SL	5.00	16	7,913.			7,913.	396.		783.
168	EQUIPMENT	063015	SL	5.00	16	13,000.			13,000.			1,300.
175	SECURITY SYSTEM	070115	SL	5.00	16	10,777.			10,777.			1,976.
176	FURNITURE & FIXTURE	081315	SL	5.00	16	508.			508.			85.
177	BOOKSHELVES	082115	SL	5.00	16	264.			264.			44.
178	2 NEC DSX 34 BUTTON TELEPHONE SET	082615	SL	5.00	16	259.			259.			43.
179	REFRIGRATOR	083015	SL	5.00	16	1,336.			1,336.			223.
180	NEC DSX 34 BUTTON TELEPHONE	090115	SL	5.00	16	319.			319.			48.
181	STUDENT CHAIRS	090315	SL	5.00	16	1,064.			1,064.			160.
182	BACKYARD ADVENTURES	090415	SL	5.00	16	1,825.			1,825.			274.
183	18000 BTU A/C UNIT	090915	SL	5.00	16	3,289.			3,289.			494.
184	CHAIRS FOR FACULTY LOUNGE	091215	SL	5.00	16	82.			82.			12.
185	6 DESKTOP COMPUTERS	091415	SL	5.00	16	4,745.			4,745.			712.
186	TABLE FOR KITCHEN	091415	SL	5.00	16	209.			209.			31.
187	FURNITURE FOR FIBER ROOM	092315	SL	5.00	16	238.			238.			36.
188	UAP-LR 2.4 ACCESS POINT WIRELESS	100515	SL	5.00	16	396.			396.			53.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
189	5 PORT NETWORK SWITCH	100515	SL	5.00	16	737.			737.			98.
190	2 COMPUTERS	103015	SL	5.00	16	1,593.			1,593.			212.
191	COMPUTER MONITOR	111015	SL	5.00	16	144.			144.			17.
192	BUS OFFICE DESK	111815	SL	5.00	16	119.			119.			14.
193	NEC DESK PHONE	120415	SL	5.00	16	199.			199.			20.
194	QQUEST SOFTWARE SYSTEM	062116	SL	5.00	16	4,082.			4,082.			0.
195	5 COMPUTERS	063016	SL	5.00	16	1,782.			1,782.			0.
196	CHALKBOARDS	063016	SL	5.00	16	11,830.			11,830.			0.
	* 990 PAGE 10 TOTAL FURNITURE & FIXTUR TRANSPORTATION EQUIPMENT					224,326.		0.	224,326.	92,007.	0.	20,499.
207	VOLKSWAGON VAN #1	103015	SL	5.00	16	15,131.			15,131.			2,036.
208	VOLKSWAGON VAN #2	103015	SL	5.00	16	15,131.			15,131.			2,026.
209	VOLKSWAGON VAN #3	103015	SL	5.00	16	15,131.			15,131.			2,027.
	* 990 PAGE 10 TOTAL TRANSPORTATION EQU					45,393.		0.	45,393.	0.	0.	6,089.
	LAND											
22	LAND--3547 ALTADENA	092999	L			147,685.			147,685.			0.
22	VACANY LOT ALTADENA	020906	L			213,403.			213,403.			0.
23	LAND--3539 ALTADENA	041406	L			52,192.			52,192.			0.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
24	LAND--3541 ALTADENA	041406	L			52,190.			52,190.			0.
78	LAND--3565 ALTADENA	071907	L			85,796.			85,796.			0.
	LAND -- 4135-4137											
128	54TH PLACE	111813	L			1002530.			1002530.			0.
	* 990 PAGE 10 TOTAL											
	LAND					1553796.		0.	1553796.	0.	0.	0.
	BUILDINGS											
	BUILDING--3547											
1	ALTADENA	092999	SL	50.00	16	590,740.			590,740.	207,138.		11,815.
	BUILDING--3539											
3	ALTADENA	041406	SL	50.00	16	208,760.			208,760.	39,757.		4,175.
	BUILDING--3541											
4	ALTADENA	041406	SL	50.00	16	208,760.			208,760.	39,756.		4,175.
	BUILDING--3565											
55	ALTADENA	071907	SL	50.00	16	343,184.			343,184.	57,015.		6,864.
	BUILDING											
79	IMPROVEMENT--3547 A	041309	SL	50.00	16	5,040.			5,040.	706.		101.
	BUILDING --											
127	4135-4137 54TH PLAC	111813	SL	50.00	16	1897470.			1897470.	62,099.		37,949.
	* 990 PAGE 10 TOTAL											
	BUILDINGS					3253954.		0.	3253954.	406,471.	0.	65,079.
	* 990 PAGE 10 TOTAL											
	-					5077469.		0.	5077469.	498,478.	0.	91,667.
	BUILDINGS											
12	IMPROVEMENTS	081505	SL	10.00	16	6,979.			6,979.	6,979.		0.
13	IMPROVEMENTS	090105	SL	10.00	16	1,300.			1,300.	1,300.		0.
14	IMPROVEMENTS	091705	SL	50.00	16	7,711.			7,711.	1,542.		154.
15	IMPROVEMENTS	101805	SL	10.00	16	19,000.			19,000.	19,000.		0.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
16	IMPROVEMENTS	122905	SL	10.00	16	1,500.			1,500.	1,425.		75.
17	IMPROVEMENTS	011906	SL	10.00	16	1,747.			1,747.	1,659.		88.
18	IMPROVEMENTS	050406	SL	50.00	16	2,000.			2,000.	360.		40.
19	IMPROVEMENTS	061006	SL	10.00	16	1,500.			1,500.	1,350.		150.
20	IMPROVEMENTS	061906	SL	10.00	16	4,000.			4,000.	3,600.		400.
21	IMPROVEMENTS	062006	SL	10.00	16	2,746.			2,746.	2,471.		275.
39	IMPROVEMENTS	072306	SL	50.00	16	7,940.			7,940.	1,429.		159.
40	IMPROVEMENTS	072306	SL	50.00	16	12,306.			12,306.	2,215.		246.
41	IMPROVEMENTS	072306	SL	50.00	16	8,500.			8,500.	1,530.		170.
42	IMPROVEMENTS	081406	SL	10.00	16	11,525.			11,525.	10,373.		1,152.
43	IMPROVEMENTS	081406	SL	50.00	16	20,446.			20,446.	3,680.		409.
44	IMPROVEMENTS	081506	SL	50.00	16	1,219.			1,219.	219.		24.
45	IMPROVEMENTS	101006	SL	50.00	16	171,937.			171,937.	30,949.		3,439.
46	IMPROVEMENTS	101206	SL	50.00	16	16,437.			16,437.	2,959.		329.
47	IMPROVEMENTS	101206	SL	10.00	16	1,950.			1,950.	1,755.		195.
48	IMPROVEMENTS	110306	SL	50.00	16	1,393.			1,393.	251.		28.
49	IMPROVEMENTS	020907	SL	50.00	16	9,395.			9,395.	1,597.		188.
50	IMPROVEMENTS	020907	SL	50.00	16	764.			764.	130.		15.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
51	IMPROVEMENTS	030207	SL	50.00	16	14,446.			14,446.	2,456.		289.
52	IMPROVEMENTS	033007	SL	10.00	16	1,535.			1,535.	1,305.		154.
53	IMPROVEMENTS	050807	SL	50.00	16	5,392.			5,392.	863.		108.
54	IMPROVEMENTS	062707	SL	10.00	16	13,300.			13,300.	10,640.		1,330.
63	IMPROVEMENTS	072007	SL	50.00	16	35,726.			35,726.	5,716.		715.
64	IMPROVEMENTS	092707	SL	50.00	16	17,704.			17,704.	2,833.		354.
65	IMPROVEMENTS	110207	SL	50.00	16	24,587.			24,587.	3,934.		492.
66	IMPROVEMENTS	111807	SL	50.00	16	4,274.			4,274.	684.		85.
67	IMPROVEMENTS	121907	SL	50.00	16	5,898.			5,898.	885.		118.
68	IMPROVEMENTS	012208	SL	50.00	16	13,926.			13,926.	2,089.		279.
69	IMPROVEMENTS	021508	SL	50.00	16	3,953.			3,953.	593.		79.
70	IMPROVEMENTS	030708	SL	50.00	16	17,368.			17,368.	2,605.		347.
71	IMPROVEMENTS	040208	SL	50.00	16	5,713.			5,713.	857.		114.
72	IMPROVEMENTS	041408	SL	50.00	16	5,983.			5,983.	897.		120.
73	IMPROVEMENTS	041708	SL	50.00	16	589.			589.	88.		12.
74	IMPROVEMENTS	042808	SL	50.00	16	7,136.			7,136.	1,070.		143.
75	IMPROVEMENTS	052708	SL	50.00	16	23,786.			23,786.	3,568.		476.
76	IMPROVEMENTS	052808	SL	50.00	16	3,349.			3,349.	502.		67.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
77	IMPROVEMENTS	061008	SL	50.00	16	11,913.			11,913.	1,787.		238.
80	IMPROVEMENTS	080608	SL	50.00	16	15,039.			15,039.	2,105.		301.
81	IMPROVEMENTS	081508	SL	50.00	16	7,601.			7,601.	1,064.		152.
82	IMPROVEMENTS	082208	SL	50.00	16	85.			85.	12.		2.
83	IMPROVEMENTS	091208	SL	50.00	16	9,283.			9,283.	1,300.		186.
84	IMPROVEMENTS	091908	SL	50.00	16	802.			802.	112.		16.
85	IMPROVEMENTS	100308	SL	50.00	16	701.			701.	99.		14.
86	IMPROVEMENTS	101608	SL	5.00	16	75.			75.	75.		0.
87	IMPROVEMENTS	101608	SL	50.00	16	5,845.			5,845.	818.		117.
88	IMPROVEMENTS	103108	SL	50.00	16	1,645.			1,645.	230.		33.
89	IMPROVEMENTS	111008	SL	50.00	16	11,185.			11,185.	1,566.		224.
90	IMPROVEMENTS	112108	SL	50.00	16	2,209.			2,209.	309.		44.
91	IMPROVEMENTS	120808	SL	50.00	16	804.			804.	113.		16.
92	IMPROVEMENTS	012609	SL	50.00	16	5,000.			5,000.	700.		100.
93	IMPROVEMENTS	031909	SL	50.00	16	789.			789.	111.		16.
94	IMPROVEMENTS	051309	SL	50.00	16	8,681.			8,681.	1,215.		174.
95	IMPROVEMENTS	052709	SL	50.00	16	4,993.			4,993.	699.		100.
96	IMPROVEMENTS	062909	NC	5.00		-1,413.			-1,413.	-284.		0.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
98	IMPROVEMENTS	072809	SL	50.00	16	1,000.			1,000.	140.		20.
99	IMPROVEMENTS	073109	SL	5.00	16	-589.			-589.	-589.		0.
100	IMPROVEMENTS	073109	SL	50.00	16	153,116.			153,116.	21,436.		3,062.
101	IMPROVEMENTS	080109	SL	50.00	16	6,000.			6,000.	720.		120.
102	IMPROVEMENTS	092409	SL	50.00	16	4,950.			4,950.	594.		99.
103	IMPROVEMENTS	100909	SL	50.00	16	543.			543.	65.		11.
104	IMPROVEMENTS	102009	SL	50.00	16	5,896.			5,896.	708.		118.
105	IMPROVEMENTS	121009	SL	50.00	16	720.			720.	86.		14.
106	IMPROVEMENTS	122109	SL	50.00	16	6,307.			6,307.	757.		126.
107	IMPROVEMENTS	012010	SL	50.00	16	460.			460.	55.		9.
108	IMPROVEMENTS	020310	SL	50.00	16	2,500.			2,500.	300.		50.
109	IMPROVEMENTS	020910	SL	50.00	16	4,225.			4,225.	507.		85.
110	IMPROVEMENTS	021910	SL	50.00	16	11,895.			11,895.	1,427.		238.
111	IMPROVEMENTS	022510	SL	50.00	16	2,060.			2,060.	247.		41.
112	IMPROVEMENTS	031110	SL	50.00	16	10,417.			10,417.	1,250.		208.
123	IMPROVEMENTS	091010	SL	50.00	16	3,250.			3,250.	325.		65.
124	IMPROVEMENTS	110110	SL	50.00	16	5,300.			5,300.	530.		106.
142	IMPROVEMENTS	080113	SL	5.00	16	66,726.			66,726.	26,690.		13,345.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
143	IMPROVEMENTS	093013	SL	5.00	16	491.			491.	179.		98.
144	IMPROVEMENTS	100813	NC	.000		-2,238.			-2,238.			0.
145	IMPROVEMENTS	010114	SL	10.00	16	1,342.			1,342.	207.		134.
146	IMPROVEMENTS	092514	SL	5.00	16	867.			867.	130.		173.
147	IMPROVEMENTS	121814	SL	5.00	16	500.			500.	50.		100.
197	IMPROVEMENTS	070615	SL	7.00	16	4,939.			4,939.			647.
198	IMPROVEMENTS	080715	SL	7.00	16	1,518.			1,518.			181.
199	IMPROVEMENTS	081015	SL	7.00	16	975.			975.			116.
200	IMPROVEMENTS	081815	SL	7.00	16	1,260.			1,260.			150.
201	IMPROVEMENTS	082615	SL	50.00	16	1,435.			1,435.			24.
202	IMPROVEMENTS	090715	SL	7.00	16	739.			739.			79.
203	IMPROVEMENTS	090715	SL	7.00	16	330.			330.			35.
204	IMPROVEMENTS	090915	SL	5.00	16	400.			400.			60.
205	IMPROVEMENTS	093015	SL	50.00	16	33,297.			33,297.			499.
206	IMPROVEMENTS	020116	SL	50.00	16	33,726.			33,726.			225.
	* 990 PAGE 10 TOTAL BUILDINGS					966,554.		0.	966,554.	206,203.	0.	34,789.
	* 990 PAGE 10 TOTAL BUILDINGS					966,554.		0.	966,554.	206,203.	0.	34,789.

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
169	COMMERCIAL KITCHEN REPAIR	091714	SL	10.00	16	2,039.			2,039.	153.		204.
170	MUSIC ROOM STORAGE	101114	SL	10.00	16	8,768.			8,768.	585.		877.
171	INSTALL LOWER PARKING LOT	111414	SL	10.00	16	2,832.			2,832.	165.		283.
172	REPLACE POST BOLTED TO STAIRS	111514	SL	10.00	16	132.			132.	8.		13.
173	ROOF REPAIR	011315	SL	10.00	16	4,000.			4,000.	167.		400.
174	ROOF REPAIR	012115	SL	10.00	16	7,158.			7,158.	298.		716.
	* 990 PAGE 10 TOTAL BUILDINGS					24,929.		0.	24,929.	1,376.	0.	2,493.
	* 990 PAGE 10 TOTAL -					24,929.		0.	24,929.	1,376.	0.	2,493.
	* GRAND TOTAL 990 PAGE 10 DEPR					6068952.		0.	6068952.	706,057.	0.	128,949.
	CURRENT ACTIVITY											
	BEGINNING BALANCE					5899143.		0.	5899143.	706,057.		
	ACQUISITIONS					169,809.		0.	169,809.	0.		
	DISPOSITIONS					0.		0.	0.	0.		
	ENDING BALANCE					6068952.		0.	6068952.	706,057.		
	ENDING ACCUM DEPR									835,006.		
	ENDING BOOK VALUE									5233946.		

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

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

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO	Employer identification number (EIN) or 95-3641387
	Number, street, and room or suite no. If a P.O. box, see instructions. 3547 ALTADENA AVENUE	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SAN DIEGO, CA 92105	

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

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

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

KIM GALVIN

• The books are in the care of **3547 ALTADENA AVENUE - SAN DIEGO, CA 92105**

Telephone No. **619-287-3054**

Fax No.

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until **MAY 15, 2017**.
- 5 For calendar year , or other tax year beginning **JUL 1, 2015**, and ending **JUN 30, 2016**.
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

7 State in detail why you need the extension
ADDITIONAL TIME IS NEEDED TO OBTAIN THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.

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

Signature and Verification must be completed for Part II only.

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

Signature

Title **CPA**

Date

Form 8868 (Rev. 1-2014)