MACIAS GINI & O'CONNELL LLP
2029 CENTURY PARK EAST STE 1500
LOS ANGELES, CA 90067-2935

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO
3547 ALTADENA AVENUE
SAN DIEGO, CA 92105

926340
04-01-19

CLIENT'S COPY

mgo Certified Public Accountants

May 1, 2021

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO
3547 ALTADENA AVENUE
SAN DIEGO, CA 92105

ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO:

Enclosed is the organization's 2019 Exempt Organization return. The state Exempt Organization return and Annual Report are also enclosed. These should be signed, dated, and mailed, as indicated.

Specific filing instructions are as follows.

FORM 990 RETURN:

This return has been prepared for electronic filing. If you wish to have it transmitted electronically to the IRS, please sign, date, and return Form 8879-EO to our office. We will then submit the electronic return to the IRS. Do not mail a paper copy of the return to the IRS. Return Form 8879-EO to us as soon as possible.

CALIFORNIA FORM 199 RETURN:

The California Form 199 return has been prepared for electronic filing. If you wish to have it transmitted electronically to the FTB, please sign, date and return Form 8453-EO to our office. We will then submit the electronic return to the FTB. Do not mail the paper copy of the return to the FTB.

No payment is required.

CALIFORNIA FORM RRF-1:

The California Form RRF-1 should be mailed on or before May 17, 2021 to:

Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

Enclose a check or money order for $150, payable to Department of Justice.

The report should be signed and dated by the authorized individual(s).

Copies of all the returns are enclosed for your files. We suggest that you retain these copies indefinitely.

Very truly yours,

Andrew J. Ozurovich

TAX RETURN FILING INSTRUCTIONS
FORM 990

FOR THE YEAR ENDING
June 30, 2020

Prepared For:

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO
3547 ALTADENA AVENUE
SAN DIEGO, CA 92105

Prepared By:

Macias Gini & O'Connell LLP
2029 Century Park East Ste 1500
Los Angeles, CA 90067-2935

Amount Due or Refund:

Not applicable

Make Check Payable To:

Not applicable

Mail Tax Return and Check (if applicable) To:

Not applicable

Return Must be Mailed On or Before:

Not applicable

Special Instructions:

This return has been prepared for electronic filing. If you wish to have it transmitted electronically to the IRS, please sign, date, and return Form 8879-EO to our office. We will then submit the electronic return to the IRS. Do not mail a paper copy of the return to the IRS. Return Form 8879-EO to us as soon as possible.

Form **8879-EO**

Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization for an Exempt Organization

For calendar year 2019, or fiscal year beginning JUL 1 , 2019, and ending JUN 30 , 2020

▶ **Do not send to the IRS. Keep for your records.**

▶ **Go to www.irs.gov/Form8879EO for the latest information.**

OMB No. 1545-1878

2019

Name of exempt organization

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO

Employer identification number

95-3641387

Name and title of officer

RACHEL DAVIS
ADMINISTRATOR

Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a, 2a, 3a, 4a,** or **5a,** below, and the amount on that line for the return being filed with this form was blank, then leave line **1b, 2b, 3b, 4b,** or **5b,** whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

1a	Form 990 check here ▶ [X]	**b Total revenue,** if any (Form 990, Part VIII, column (A), line 12)	**1b**	5,643,101.
2a	Form 990-EZ check here ▶ [ ]	**b Total revenue,** if any (Form 990-EZ, line 9)	**2b**	
3a	Form 1120-POL check here ▶ [ ]	**b Total tax** (Form 1120-POL, line 22)	**3b**	
4a	Form 990-PF check here ▶ [ ]	**b Tax based on investment income** (Form 990-PF, Part VI, line 5)	**4b**	
5a	Form 8868 check here ▶ [ ]	**b Balance Due** (Form 8868, line 3c)	**5b**	

Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2019 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS **(a)** an acknowledgement of receipt or reason for rejection of the transmission, **(b)** the reason for any delay in processing the return or refund, and **(c)** the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

[X] I authorize MACIAS GINI & O'CONNELL LLP to enter my PIN 95364

ERO firm name

Enter five numbers, but do not enter all zeros

as my signature on the organization's tax year 2019 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

[ ] As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2019 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ ______ Date ▶ ______

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN. 68605990067

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2019 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163,** Modernized e-File (MeF) Information for Authorized IRS *e-file* Providers for Business Returns.

ERO's signature ▶ MACIAS GINI & O'CONNELL LLP Date ▶ 05/01/21

ERO Must Retain This Form - See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So

LHA **For Paperwork Reduction Act Notice, see instructions.**

EXTENDED TO MAY 17, 2021

Form **990** (Rev. January 2020) Department of the Treasury Internal Revenue Service

Return of Organization Exempt From Income Tax

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

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

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

OMB No. 1545-0047 **2019** Open to Public Inspection

A For the 2019 calendar year, or tax year beginning JUL 1, 2019 and ending JUN 30, 2020

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

C Name of organization: ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO

Doing business as

Number and street (or P.O. box if mail is not delivered to street address): 3547 ALTADENA AVENUE — Room/suite

City or town, state or province, country, and ZIP or foreign postal code: SAN DIEGO, CA 92105

D Employer identification number: 95-3641387

E Telephone number: 619-287-3054

G Gross receipts $ 5,953,576.

F Name and address of principal officer: RACHEL DAVIS SAME AS C ABOVE

H(a) Is this a group return for subordinates? [ ] Yes [X] No

H(b) Are all subordinates included? [ ] Yes [ ] No — If "No," attach a list. (see instructions)

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

J Website: ▶ HTTP://WWW.WALDORFSANDIEGO.ORG/

H(c) Group exemption number ▶

K Form of organization: [X] Corporation [ ] Trust [ ] Association [ ] 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 ▶ [ ] 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	6
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	6
5	Total number of individuals employed in calendar year 2019 (Part V, line 2a)	5	95
6	Total number of volunteers (estimate if necessary)	6	5
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b	Net unrelated business taxable income from Form 990-T, line 39	7b	0.

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	368,380.	247,577.
	9	Program service revenue (Part VIII, line 2g)	5,159,500.	5,084,009.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	501.	269.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	279,035.	311,246.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	5,807,416.	5,643,101.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	1,074,401.	929,374.
	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)	3,476,904.	3,597,959.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 37,128.		
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	1,379,867.	1,318,579.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	5,931,172.	5,845,912.
	19	Revenue less expenses. Subtract line 18 from line 12	-123,756.	-202,811.
Net Assets or Fund Balances			Beginning of Current Year	End of Year
	20	Total assets (Part X, line 16)	5,785,051.	6,105,370.
	21	Total liabilities (Part X, line 26)	4,299,009.	4,822,139.
	22	Net assets or fund balances. Subtract line 21 from line 20	1,486,042.	1,283,231.

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

▶ RACHEL DAVIS, ADMINISTRATOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
ANDREW J. OZUROVICH	ANDREW J. OZUROVICH	05/01/21		P00736945

Firm's name ▶ MACIAS GINI & O'CONNELL LLP — Firm's EIN ▶ 68-0300457

Firm's address ▶ 2029 CENTURY PARK EAST STE 1500 LOS ANGELES, CA 90067-2935 — Phone no. (310) 277-3373

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

Part III | Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:
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, SPRITUAL, 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 [X] 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 [X] 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 $ 4,844,299. including grants of $ 929,374.) (Revenue $ 5,092,048.)
K-12 EDUCATION. WALDORF SCHOOLS OFFER A DEVELOPMENTALLY APPROPRIATE, EXPERINTIAL 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. AN AVERAGE OF 270 STUDENTS WERE ENROLLED FOR 2019/2020 SCHOOL YEAR.

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

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

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

4e Total program service expenses ▶ 4,844,299.

Part IV | Checklist of Required Schedules

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

Part IV Checklist of Required Schedules *(continued)*

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	35			
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		

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

				Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 95			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?		2b	X	
	Note: If the sum of lines 1a and 2a is greater than 250, you may be required to *e-file* (see instructions)				
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 on Schedule O*		3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		4a		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?		5c		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		6b		
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?		7a		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		7c		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?		7e		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		7f		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		7h		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		8		
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?		9a		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b		
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?		12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state?		13a		
	Note: See the instructions for additional information the organization must report on Schedule O.				
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 on Schedule O*		14b		
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.		15		X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.		16		X

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

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

Section A. Governing Body and Management

			Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year — 1a: 6. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.			
b	Enter the number of voting members included on line 1a, above, who are independent — 1b: 6			
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, 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 on 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. If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).	15b	X	
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 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

[ ] Own website [ ] Another's website [X] Upon request [ ] Other *(explain on Schedule O)*

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records ▶

KIM GALVIN - 619-287-3054

3547 ALTADENA AVENUE, SAN DIEGO, CA 92105

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

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

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

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

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

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

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

(A) 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): Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(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
(1) KATHERINE GIGLIO TEACHER/BOARD MEMBER	40.00	X		X				64,520.	0.	7,003.
(2) PATRICK GODDARD CHAIR	5.00	X		X				0.	0.	0.
(3) DOMINICK ARENA CO-CHAIR	2.00	X		X				0.	0.	0.
(4) RACHEL DAVIS ADMINISTRATOR/BOARD MEMBER	40.00	X						73,506.	0.	21,595.
(5) JESSICA KRAUS BOARD MEMBER	2.00	X						0.	0.	0.
(6) LEIGH ELKOLI TREASURER	5.00	X		X				0.	0.	0.
(7) KATE VANCE BOARD MEMBER	2.00	X						0.	0.	0.
(8) CLARE KNAUSS BOARD MEMBER	40.00	X		X				24,482.	0.	15,907.
(9) SUZY BRAMZON BOARD MEMBER	2.00	X						0.	0.	0.
(10) MARY CARMICHAEL TEACHER/BOARD MEMBER	40.00			X				53,584.	0.	9,381.

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: Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(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

	(D)	(E)	(F)
1b Subtotal ▶	216,092.	0.	53,886.
c Total from continuation sheets to Part VII, Section A ▶	0.	0.	0.
d Total (add lines 1b and 1c) ▶	216,092.	0.	53,886.

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, 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 NONE	(B) Description of services	(C) Compensation

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

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					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	247,577.				
	g	Noncash contributions included in lines 1a-1f	1g	$				
	h	**Total.** Add lines 1a-1f ▶			247,577.			
Program Service Revenue				Business Code				
	2 a	TUITION		611710	4,794,999.	4,794,999.		
	b	SCHOOL FEES		611710	141,831.	141,831.		
	c	FIELD TRIP REVENUE		611710	106,824.	106,824.		
	d	EXTENDED CARE		611710	40,355.	40,355.		
	e							
	f	All other program service revenue						
	g	**Total.** Add lines 2a-2f ▶			5,084,009.			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts) ▶			269.			269.
	4	Income from investment of tax-exempt bond proceeds ▶						
	5	Royalties ▶						
				(i) Real / (ii) Personal				
	6 a	Gross rents	6a	27,822. /				
	b	Less: rental expenses	6b	0. /				
	c	Rental income or (loss)	6c	27,822. /				
	d	Net rental income or (loss) ▶			27,822.			27,822.
				(i) Securities / (ii) Other				
	7 a	Gross amount from sales of assets other than inventory	7a					
	b	Less: cost or other basis and sales expenses	7b					
	c	Gain or (loss)	7c					
	d	Net gain or (loss) ▶						
	8 a	Gross income from fundraising events (not including $ ______ of contributions reported on line 1c). See Part IV, line 18	8a	138,172.				
	b	Less: direct expenses	8b	35,727.				
	c	Net income or (loss) from fundraising events ▶			102,445.			102,445.
	9 a	Gross income from gaming activities. See Part IV, line 19	9a					
	b	Less: direct expenses	9b					
	c	Net income or (loss) from gaming activities ▶						
	10 a	Gross sales of inventory, less returns and allowances	10a	282,787.				
	b	Less: cost of goods sold	10b	274,748.				
	c	Net income or (loss) from sales of inventory ▶			8,039.	8,039.		
Miscellaneous Revenue				Business Code				
	11 a	INSURANCE REIMB & MISC		611710	172,940.			172,940.
	b							
	c							
	d	All other revenue						
	e	**Total.** Add lines 11a-11d ▶			172,940.			
	12	**Total revenue.** See instructions ▶			5,643,101.	5,092,048.	0.	303,476.

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Form **990** (2019)

17210501 759947 WLADORFEDU 2019.05092 ASSOCIATION FOR WALDORF E WLADORF1

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22	929,374.	929,374.		
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	286,177.	239,578.	43,923.	2,676.
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	2,564,023.	2,146,515.	393,531.	23,977.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	503,076.	421,158.	77,213.	4,705.
10 Payroll taxes	244,683.	204,840.	37,555.	2,288.
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting	16,979.		16,979.	
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.)	53,844.	16,082.	37,762.	
12 Advertising and promotion	13,256.		13,256.	
13 Office expenses	130,465.	92,884.	37,581.	
14 Information technology				
15 Royalties				
16 Occupancy	512,416.	381,290.	131,126.	
17 Travel	2,691.	2,691.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	600.	420.	180.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	162,064.	129,651.	32,413.	
23 Insurance	250,823.	173,041.	77,782.	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a FIELD TRIPS AND CLASSRO	106,775.	106,775.		
b MISCELLANEOUS	30,011.		30,011.	
c MEMBERSHIP DUES	28,904.		28,904.	
d BOARD EXPENSE	6,269.		6,269.	
e All other expenses	3,482.			3,482.
25 **Total functional expenses.** Add lines 1 through 24e	5,845,912.	4,844,299.	964,485.	37,128.
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

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

			(A) Beginning of year		(B) End of year
Assets	1	Cash - non-interest-bearing	218,418.	1	689,177.
	2	Savings and temporary cash investments	145,869.	2	146,081.
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	48,346.	4	96,337.
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use	106,756.	8	72,758.
	9	Prepaid expenses and deferred charges	34,988.	9	12,491.
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D — 10a: 6,535,304.			
	b	Less: accumulated depreciation — 10b: 1,446,778.	5,230,674.	10c	5,088,526.
	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		15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)	5,785,051.	16	6,105,370.
Liabilities	17	Accounts payable and accrued expenses	137,524.	17	164,536.
	18	Grants payable		18	
	19	Deferred revenue	378,027.	19	262,595.
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23	Secured mortgages and notes payable to unrelated third parties	3,766,544.	23	4,378,678.
	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	16,914.	25	16,330.
	26	**Total liabilities.** Add lines 17 through 25	4,299,009.	26	4,822,139.
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ [X] and complete lines 27, 28, 32, and 33.**			
	27	Net assets without donor restrictions	1,340,664.	27	1,135,707.
	28	Net assets with donor restrictions	145,378.	28	147,524.
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.			
	29	Capital stock or trust principal, or current funds		29	
	30	Paid-in or capital surplus, or land, building, or equipment fund		30	
	31	Retained earnings, endowment, accumulated income, or other funds		31	
	32	Total net assets or fund balances	1,486,042.	32	1,283,231.
	33	Total liabilities and net assets/fund balances	5,785,051.	33	6,105,370.

Form **990** (2019)

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	5,643,101.
2	Total expenses (must equal Part IX, column (A), line 25)	2	5,845,912.
3	Revenue less expenses. Subtract line 2 from line 1	3	-202,811.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	1,486,042.
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 on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	1,283,231.

Part XII Financial Statements and Reporting

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

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis	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: ☒ Separate basis ☐ Consolidated basis ☐ 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 on 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 on Schedule O and describe any steps taken to undergo such audits	3b		

Form **990** (2019)

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

OMB No. 1545-0047
2019
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 12, check only one box.)

1 [ ] A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
2 [X] 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 agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: ____________
10 [ ] An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
11 [ ] An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
12 [ ] An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

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

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

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

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

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

f Enter the number of supported organizations ....

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

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(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) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(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** ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2019 (line 6, column (f) divided by line 11, column (f)) | 14 | %

15 Public support percentage from 2018 Schedule A, Part II, line 14 | 15 | %

16a **33 1/3% support test - 2019.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support test - 2018.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

17a **10% -facts-and-circumstances test - 2019.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ ☐

b **10% -facts-and-circumstances test - 2018.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ ☐

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(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) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(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 2019 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2018 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2019** (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from **2018** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2019.** 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 - 2018.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

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

Part IV **Supporting Organizations**

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

Section A. All Supporting Organizations

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

Part IV **Supporting Organizations** *(continued)*

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described 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 ☐ The organization satisfied the Activities Test. *Complete* **line 2** *below.*

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

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

			Yes	No
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		

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

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

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

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
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 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

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

Section D - Distributions	**Current Year**
1 Amounts paid to supported organizations to accomplish exempt purposes	
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 2019 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-2019**	(iii) **Distributable Amount for 2019**
1 Distributable amount for 2019 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2019 (reasonable cause required- explain in **Part VI**). See instructions.			
3 Excess distributions carryover, if any, to 2019			
a From 2014			
b From 2015			
c From 2016			
d From 2017			
e From 2018			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2019 distributable amount			
i Carryover from 2014 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2019 from Section D, line 7: $			
a Applied to underdistributions of prior years			
b Applied to 2019 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2019, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in **Part VI.** See instructions.			
6 Remaining underdistributions for 2019. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in **Part VI**. See instructions.			
7 **Excess distributions carryover to 2020.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2015			
b Excess from 2016			
c Excess from 2017			
d Excess from 2018			
e Excess from 2019			

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

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

OMB No. 1545-0047

2019

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

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	[X] 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

[X] 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. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year .... ▶ $ ________

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

Name of organization: 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	DANA AND JULIE ZEFF 561 MARINA AVE CORONADO, CA 92118	$ 71,955.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
2	THE DAPHNE SEYBOLT CULPEPER MEMORIAL FOUNDATION INC P.O. BOX 206 NORWALK, CT 06852	$ 35,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
3	KATHERINE AND STEPHEN VANCE 2225 SEASIDE ST SAN DIEGO, CA 92107	$ 15,496.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
4	I & G CHARITABLE FOUNDATION 225 W WASHINGTON ST CHICAGO, IL 60606	$ 15,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
5	KAROL MILLER AND JOSEPH FELIX 4484 SHELDON DR LE MESA, CA 91941	$ 8,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
6	STRAUSS FAMILY FOUNDATION 7887 REVELLE DR LA JOLLA, CA 92037-3539	$ 6,500.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization: ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO

Employer identification number: 95-3641387

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

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

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

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

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

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

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

Name of organization

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO

Employer identification number

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

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

OMB No. 1545-0047
2019
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? ☐ Yes ☐ No

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

b Assets included in Form 990, Part X ▶ $ ________

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

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

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange program
e ☐ Other ____

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

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

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

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

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

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

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

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided 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 Term endowment ▶ ____ %

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

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

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

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

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

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		1,553,796.		1,553,796.
b Buildings		4,598,720.	1,147,738.	3,450,982.
c Leasehold improvements				
d Equipment		312,014.	251,140.	60,874.
e Other		70,774.	47,900.	22,874.
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10c.)* ▶				5,088,526.

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	16,330.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 25.)* ▶	16,330.

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

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	5,029,245.
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	5,043.		
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d	310,475.		
e	Add lines **2a** through **2d**			2e	315,518.
3	Subtract line **2e** from line **1**			3	4,713,727.
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	929,374.		
c	Add lines **4a** and **4b**			4c	929,374.
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	5,643,101.

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	5,232,056.
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	5,043.		
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d	310,475.		
e	Add lines **2a** through **2d**			2e	315,518.
3	Subtract line **2e** from line **1**			3	4,916,538.
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	929,374.		
c	Add lines **4a** and **4b**			4c	929,374.
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	5,845,912.

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 ADPOTED 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	35,727.
COST OF GOODS SOLD	274,748.

Part XIII Supplemental Information *(continued)*

TOTAL TO SCHEDULE D, PART XI, LINE 2D	310,475.
PART XI, LINE 4B - OTHER ADJUSTMENTS:	
GRANTS AND ASSISTANCE	929,374.
PART XII, LINE 2D - OTHER ADJUSTMENTS:	
SPECIAL EVENTS EXPENSES	35,727.
COST OF GOODS SOLD	274,748.
TOTAL TO SCHEDULE D, PART XII, LINE 2D	310,475.
PART XII, LINE 4B - OTHER ADJUSTMENTS:	
GRANTS AND ASSISTANCE	929,374.

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

OMB No. 1545-0047
2019
Open to Public Inspection

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

Employer identification number: 95-3641387

Part I

			YES	NO
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?	1	X	
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?	2	X	
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	3	X	
	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?	4a	X	
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	4b	X	
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	4c	X	
d	Copies of all material used by the organization or on its behalf to solicit contributions?	4d	X	
	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?	5a		X
b	Admissions policies?	5b		X
c	Employment of faculty or administrative staff?	5c		X
d	Scholarships or other financial assistance?	5d		X
e	Educational policies?	5e		X
f	Use of facilities?	5f		X
g	Athletic programs?	5g		X
h	Other extracurricular activities?	5h		X
	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?	6a		X
b	Has the organization's right to such aid ever been revoked or suspended?	6b		X
	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	7	X	

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.

SCHEDULE G (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.

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

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

OMB No. 1545-0047

2019

Open to Public Inspection

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

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.

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

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

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

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
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.

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.** **Schedule G (Form 990 or 990-EZ) 2019**

932081 09-11-19

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))
		FALL FESTIVAL/WIN	GALA	3	
		(event type)	(event type)	(total number)	
Revenue	1 Gross receipts	30,312.	106,691.	1,169.	138,172.
	2 Less: Contributions				
	3 Gross income (line 1 minus line 2)	30,312.	106,691.	1,169.	138,172.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	22,321.	7,790.	5,616.	35,727.
	10 Direct expense summary. Add lines 4 through 9 in column (d)			▶	35,727.
	11 Net income summary. Subtract line 10 from line 3, column (d)			▶	102,445.

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

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

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

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

b If "No," explain: ____

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

b If "Yes," explain: ____

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

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

13 Indicate the percentage of gaming activity conducted in:

a The organization's facility 13a %

b An outside facility 13b %

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

Name ▶

Address ▶

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

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

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

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

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

b Enter the amount of distributions required under state law 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** *(continued)*

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

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

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

▶ Attach to Form 990.

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

OMB No. 1545-0047

2019

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? [X] Yes [ ] No

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

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

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

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) (2019)**

932101 10-26-19

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 noncash assistance
TUITION ASSISTANCE	75	929,374.	0.	BOOK-COST OF TUITION	N/A

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

OMB No. 1545-0047

2019

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 11B:

DUE TO THE CURRENT COVID-19 GUIDELINES, WE WERE NOT ABLE TO FOLLOW STANDARD PRACTICES. THE TAX DOCUMENTS WERE REVIEWED BY THE ADMINISTRATOR AND BOARD TREASURER ONLY.

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:

THE SCHOOL HAS NOT CHANGED ITS OVERSIGHT PROCESS.

Name of the organization ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO

Employer identification number 95-3641387

2019 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10 990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
	FURNITURE & FIXTURES														
5	2ND GRADE CHAIRS	08/25/05	SL	5.00		16	1,496.				1,496.	1,496.		0.	1,496.
6	PHONE SYSTEM	08/25/05	SL	10.00		16	3,250.				3,250.	3,250.		0.	3,250.
7	PHONE UPGRADE	09/13/05	SL	10.00		16	1,467.				1,467.	1,467.		0.	1,467.
8	PHONE UPGRADE	10/03/05	SL	10.00		16	2,250.				2,250.	2,250.		0.	2,250.
9	AUDITORIUM BENCHES	01/30/06	SL	5.00		16	1,000.				1,000.	1,000.		0.	1,000.
10	BIRCH EURHMY FLOOR	06/14/06	SL	20.00		16	20,493.				20,493.	13,321.		1,025.	14,346.
11	OFFICE RE-CARPET	06/23/06	SL	5.00		16	1,441.				1,441.	1,441.		0.	1,441.
25	SEA CARGO CONTAINER	07/23/06	SL	5.00		16	800.				800.	800.		0.	800.
26	FURNITURE& KITCHEN SUPPLIES	08/14/06	SL	5.00		16	1,368.				1,368.	1,368.		0.	1,368.
27	AUDITORIUM FOLDING CHAIRS	09/06/06	SL	5.00		16	592.				592.	592.		0.	592.
28	TABLE	09/14/06	SL	5.00		16	790.				790.	790.		0.	790.
29	3 CABINETS	09/19/06	SL	5.00		16	1,200.				1,200.	1,200.		0.	1,200.
30	38 CHAIRS	09/19/06	SL	5.00		16	1,900.				1,900.	1,900.		0.	1,900.
31	CHAIRS	09/28/06	SL	5.00		16	3,019.				3,019.	3,019.		0.	3,019.
32	FAST SIGNS	09/28/06	SL	5.00		16	800.				800.	800.		0.	800.
33	CHALKBOARDS	09/28/06	SL	5.00		16	1,258.				1,258.	1,258.		0.	1,258.
34	LIVE WIRE COMMUNICATIONS	10/04/06	SL	10.00		16	1,298.				1,298.	1,298.		0.	1,298.

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35	BENCHES	10/10/06	SL	5.00		16	790.				790.	790.		0.	790.
36	FAST SIGNS	11/03/06	SL	5.00		16	1,394.				1,394.	1,394.		0.	1,394.
37	COMPUTERS	02/27/07	SL	5.00		16	1,608.				1,608.	1,608.		0.	1,608.
38	WEBSITE	03/30/07	SL	5.00		16	4,150.				4,150.	4,150.		0.	4,150.
56	WEBSITE	07/31/07	SL	5.00		16	1,490.				1,490.	1,490.		0.	1,490.
57	NEW CHAIRS/TABLES	08/06/07	SL	5.00		16	3,446.				3,446.	3,446.		0.	3,446.
58	CHAIRS	08/06/07	SL	5.00		16	2,621.				2,621.	2,621.		0.	2,621.
59	TRAKWARE INC	12/07/07	SL	5.00		16	3,363.				3,363.	3,363.		0.	3,363.
60	SWING SET	10/12/07	SL	5.00		16	701.				701.	701.		0.	701.
61	SPACE ARCH	01/30/08	SL	5.00		16	1,450.				1,450.	1,450.		0.	1,450.
62	TRAKWARE INC	04/28/08	SL	5.00		16	2,435.				2,435.	2,435.		0.	2,435.
97	DISCOUNT SCHOOL	09/23/09	SL	5.00		16	2,135.				2,135.	2,135.		0.	2,135.
113	FENCE EXPANSION	07/30/10	SL	10.00		16	1,900.				1,900.	1,900.		0.	1,900.
114	SCIENCE TABLE	08/13/10	SL	5.00		16	5,064.				5,064.	5,064.		0.	5,064.
115	11 WOODEN CHAIRS	09/10/10	SL	5.00		16	1,854.				1,854.	1,854.		0.	1,854.
116	8 STUDENT DESKS	09/10/10	SL	5.00		16	960.				960.	960.		0.	960.
117	EQUIPMENT	09/27/10	SL	5.00		16	1,689.				1,689.	1,689.		0.	1,689.
118	BIZCHAIR FURNITURE	10/11/10	SL	5.00		16	552.				552.	552.		0.	552.

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119	DELL IT	10/11/10	SL	5.00		16	2,040.				2,040.	2,040.		0.	2,040.
120	EQUIPMENT	01/12/11	SL	5.00		16	2,375.				2,375.	2,375.		0.	2,375.
121	TABLE/BECH	03/03/11	SL	5.00		16	601.				601.	601.		0.	601.
122	STACKING CHAIRS	03/03/11	SL	5.00		16	796.				796.	796.		0.	796.
125	WASHER/DRYER	11/13/12	SL	5.00		16	1,346.				1,346.	1,346.		0.	1,346.
126	CIRCULAR SAW	03/07/13	SL	5.00		16	678.				678.	678.		0.	678.
129	ASUS H61M-PLUS DESTOP	08/28/13	SL	5.00		16	2,422.				2,422.	2,422.		0.	2,422.
130	CHAIRS COLINA CAMPUS	08/12/13	SL	5.00		16	951.				951.	951.		0.	951.
131	FOLDING CHAIRS - COLINA CAMPUS	08/12/13	SL	5.00		16	799.				799.	799.		0.	799.
132	CHALKBOARDS -- COLINA CAMPUS	08/12/13	SL	5.00		16	979.				979.	979.		0.	979.
133	ACER ASPIRE -- V5471P	09/03/13	SL	5.00		16	789.				789.	789.		0.	789.
134	PRINTER	10/09/13	SL	5.00		16	809.				809.	809.		0.	809.
135	SCANNER	11/01/13	SL	5.00		16	475.				475.	475.		0.	475.
136	WINTER FAIRE SUPPLIES	01/01/14	SL	5.00		16	8,093.				8,093.	8,093.		0.	8,093.
137	50 METAL FOLDING CHAIRS	01/22/14	SL	5.00		16	688.				688.	688.		0.	688.
138	50 METAL FOLDING CHAIRS	01/22/14	SL	5.00		16	687.				687.	687.		0.	687.
139	SCRIP PRINTER	03/01/14	SL	5.00		16	325.				325.	325.		0.	325.
140	CREDIT CARD TERMINAL	03/03/14	SL	5.00		16	678.				678.	678.		0.	678.

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141	WOODCREST CHAIR	06/18/14	SL	5.00		16	151.				151.	151.		0.	151.
148	CONTAINER	07/01/14	SL	5.00		16	500.				500.	500.		0.	500.
149	SOLAR EXPENDITURE	07/01/14	SL	5.00		16	22,772.				22,772.	21,289.		0.	21,289.
150	CABINETS	07/09/14	SL	5.00		16	351.				351.	351.		0.	351.
151	30 DESKES	07/15/14	SL	5.00		16	6,105.				6,105.	6,003.		102.	6,105.
152	CHAIRS FOR MUSIC ROOM	08/11/14	SL	5.00		16	1,552.				1,552.	1,499.		26.	1,525.
153	6 FOLDING TABLES	08/13/14	SL	5.00		16	548.				548.	531.		9.	540.
154	WARDROBS	08/18/14	SL	5.00		16	952.				952.	919.		33.	952.
155	USMARKER BOARD	08/20/14	SL	5.00		16	547.				547.	527.		20.	547.
156	TABLES & STOOLS	08/22/14	SL	5.00		16	2,725.				2,725.	2,634.		91.	2,725.
157	CLASSROOM FURNITURE	08/23/14	SL	5.00		16	5,745.				5,745.	5,554.		191.	5,745.
158	BLACKBOARDS	08/27/14	SL	5.00		16	756.				756.	730.		26.	756.
159	ASUS DESKTOP MOTHERBOARD	08/29/14	SL	5.00		16	1,592.				1,592.	1,537.		55.	1,592.
160	IKEA FURNITURE082714	08/30/14	SL	5.00		16	470.				470.	454.		16.	470.
161	FURNITURE & FIXTURE	09/05/14	NC	.000	HY		-226.				-226.			0.	
162	12X12 COLEMAN TENT	09/10/14	SL	5.00		16	580.				580.	551.		19.	570.
163	FUJITSU SNAPSCAN SCANNER	09/10/14	SL	5.00		16	968.				968.	921.		32.	953.
164	DESKTOP MOTHERBOARD	12/09/14	SL	5.00		16	2,511.				2,511.	2,259.		209.	2,468.

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165	COMMERCIAL GRILL	12/12/14	SL	5.00		16	400.				400.	360.		33.	393.
166	COMPUTER HARDWARE & SOFTWARE	02/17/15	SL	5.00		16	1,062.				1,062.	919.		143.	1,062.
167	SECURITY CAMERA SYSTEMS	03/27/15	SL	5.00		16	7,913.				7,913.	5,928.		1,187.	7,115.
168	EQUIPMENT	06/30/15	SL	5.00		16	13,000.				13,000.	9,100.		2,600.	11,700.
175	SECURITY SYSTEM	07/01/15	SL	5.00		16	10,777.				10,777.	8,441.		2,155.	10,596.
176	FURNITURE & FIXTURE	08/13/15	SL	5.00		16	508.				508.	391.		102.	493.
177	BOOKSHELVES	08/21/15	SL	5.00		16	264.				264.	203.		53.	256.
178	2 NEC DSX 34 BUTTON TELEPHONE SET	08/26/15	SL	5.00		16	259.				259.	199.		52.	251.
179	REFRIGRATOR	08/30/15	SL	5.00		16	1,336.				1,336.	1,024.		267.	1,291.
180	NEC DSX 34 BUTTON TELEPHONE	09/01/15	SL	5.00		16	319.				319.	240.		64.	304.
181	STUDENT CHAIRS	09/03/15	SL	5.00		16	1,064.				1,064.	799.		213.	1,012.
182	BACKYARD ADVENTURES	09/04/15	SL	5.00		16	1,825.				1,825.	1,369.		365.	1,734.
183	18000 BTU A/C UNIT	09/09/15	SL	5.00		16	3,289.				3,289.	2,468.		658.	3,126.
184	CHAIRS FOR FACULTY LOUNGE	09/12/15	SL	5.00		16	82.				82.	60.		16.	76.
185	6 DESKTOP COMPUTERS	09/14/15	SL	5.00		16	4,745.				4,745.	3,559.		949.	4,508.
186	TABLE FOR KITCHEN	09/14/15	SL	5.00		16	209.				209.	157.		42.	199.
187	FURNITURE FOR FIBER ROOM	09/23/15	SL	5.00		16	238.				238.	180.		48.	228.
188	UAP-LR 2.4 ACCESS POINT WIRELSS	10/05/15	SL	5.00		16	396.				396.	290.		79.	369.

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189	5 PORT NETWORK SWITCH	10/05/15	SL	5.00		16	737.				737.	539.		147.	686.
190	2 COMPUTERS	10/30/15	SL	5.00		16	1,593.				1,593.	1,169.		319.	1,488.
191	COMPUTER MONITOR	11/10/15	SL	5.00		16	144.				144.	104.		29.	133.
192	BUS OFFICE DESK	11/18/15	SL	5.00		16	119.				119.	86.		24.	110.
193	NEC DESK PHONE	12/04/15	SL	5.00		16	199.				199.	140.		40.	180.
194	QQEST SOFTWARE SYSTEM	06/21/16	SL	5.00		16	4,082.				4,082.	2,448.		816.	3,264.
195	5 COMPUTERS	06/30/16	SL	5.00		16	1,782.				1,782.	712.		356.	1,068.
196	CHALKBOARDS	06/30/16	SL	5.00		16	11,830.				11,830.	7,098.		2,366.	9,464.
210	SWITCH	07/26/16	SL	5.00		16	1,080.				1,080.	630.		216.	846.
211	BADGE PRINTER AND PORTABLE MONITORS	11/30/16	SL	5.00		16	1,190.				1,190.	615.		238.	853.
212	PRINTER	12/28/16	SL	5.00		16	900.				900.	450.		180.	630.
213	IPAD AND MOUNT	12/31/16	SL	5.00		16	860.				860.	430.		172.	602.
214	WATER COOLER	12/31/16	SL	5.00		16	781.				781.	390.		156.	546.
215	IPAD LOCK BOXES	03/27/17	SL	5.00		16	225.				225.	101.		45.	146.
216	FURNITURE & FIXTURE	06/30/17	SL	5.00		16	2,928.				2,928.	1,172.		586.	1,758.
217	HVAC UNIT	06/30/17	SL	5.00		16	6,350.				6,350.	2,540.		1,270.	3,810.
218	METAL LUCH TRAYS	06/30/17	SL	5.00		16	550.				550.	220.		110.	330.
219	KITCHEN EQUIPMENTS	06/30/17	SL	5.00		16	1,112.				1,112.	444.		222.	666.

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220	STAINLESS STEELE SERVING TRAYS	06/30/17	SL	5.00		16	760.				760.	304.		152.	456.
221	TOOLS	06/30/17	SL	5.00		16	1,549.				1,549.	620.		310.	930.
222	FURNITURE & FIXTURE	06/30/17	SL	5.00		16	3,774.				3,774.	1,510.		755.	2,265.
223	TOOLS	06/30/17	SL	5.00		16	384.				384.	154.		77.	231.
224	SERVER	06/30/17	SL	5.00		16	1,125.				1,125.	450.		225.	675.
225	IT EQUIPMENT	06/30/17	SL	5.00		16	2,597.				2,597.	1,038.		519.	1,557.
236	10 4 FT WOOD FOLDING TABLES FOR HIGH SCHOOL	06/30/18	SL	5.00		16	534.				534.			107.	107.
237	FIRE ALARM CONTROL PANEL	06/30/18	SL	5.00		16	974.				974.			195.	195.
238	HD DOME CAMERA	06/30/18	SL	5.00		16	307.				307.			61.	61.
239	EQUIPMENT	06/30/18	SL	5.00		16	180.				180.			36.	36.
240	COMPUTER PURCHASE	06/30/18	SL	5.00		16	927.				927.			185.	185.
241	SERVER HDD - 73GB 1500K SAS	06/30/18	SL	5.00		16	214.				214.			43.	43.
242	REPLACEMENT SERVER	06/30/18	SL	5.00		16	539.				539.			108.	108.
243	TERMINAL SERVER TO HOUSE QUICKBOOKS	06/30/18	SL	5.00		16	1,701.				1,701.			340.	340.
244	EQUIPMENT	06/30/18	SL	5.00		16	886.				886.			177.	177.
245	LAPTOP COMPUTER	06/30/18	SL	5.00		16	793.				793.			159.	159.
246	EQUIPMENT	06/30/18	SL	5.00		16	2,775.				2,775.			555.	555.
247	PHONE EQUIPMENT	06/30/18	SL	5.00		16	307.				307.			61.	61.

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248	TOOLS	06/30/18	SL	5.00		16	1,039.				1,039.			208.	208.
249	FREEZER FOR COMMERCIAL KTICHEN	01/24/19	SL	5.00		16	896.				896.	75.		179.	254.
250	WOOD CABINETS FOR NEW KG	07/17/18	SL	5.00		16	2,925.				2,925.	536.		585.	1,121.
251	NEW FLOORING FOR VARIOUS CLASSROOMS	01/01/19	SL	5.00		16	13,019.				13,019.	1,302.		2,604.	3,906.
252	JDELGADO ELECTRIC - NEW LIGHTING SYSTEM	03/06/19	SL	5.00		16	34,619.				34,619.	3,462.		6,924.	10,386.
259	DEEP FREEZER	03/12/20	SL	5.00		16	316.				316.			47.	47.
263	FURNITURE & FIXTURE	07/31/18	NC	.000	HY		-1,428.				-1,428.	4,932.		2,247.	7,179.
	* 990 PAGE 10 TOTAL FURNITURE & FIXTURES						312,014.				312,014.	216,151.		35,031.	251,182.
	TRANSPORTATION EQUIPMENT														
207	VOLKSWAGON VAN #1	10/30/15	SL	5.00		16	15,131.				15,131.	11,114.		3,026.	14,140.
208	VOLKSWAGON VAN #2	10/30/15	SL	5.00		16	15,131.				15,131.	11,104.		3,026.	14,130.
209	VOLKSWAGON VAN #3	10/30/15	SL	5.00		16	15,131.				15,131.	11,105.		3,026.	14,131.
253	FORD T350	05/03/19	SL	5.00		16	25,381.				25,381.	423.		5,076.	5,499.
	* 990 PAGE 10 TOTAL TRANSPORTATION EQUIPMENT						70,774.				70,774.	33,746.		14,154.	47,900.
	LAND														
2	LAND--3547 ALTADENA	09/29/99	L				147,685.				147,685.			0.	
22	VACANY LOT ALTADENA	02/09/06	L				213,403.				213,403.			0.	
23	LAND--3539 ALTADENA	04/14/06	L				52,192.				52,192.			0.	

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24	LAND--3541 ALTADENA	04/14/06	L				52,190.				52,190.			0.	
78	LAND--3565 ALTADENA	07/19/07	L				85,796.				85,796.			0.	
128	LAND -- 4135-4137 54TH PLACE	11/18/13	L				1,002,530.				1,002,530.			0.	
	* 990 PAGE 10 TOTAL LAND						1,553,796.				1,553,796.	0.		0.	0.
	BUILDINGS														
1	BUILDING--3547 ALTADENA	09/29/99	SL	50.00		16	590,740.				590,740.	254,398.		11,815.	266,213.
3	BUILDING--3539 ALTADENA	04/14/06	SL	50.00		16	208,760.				208,760.	56,457.		4,175.	60,632.
4	BUILDING--3541 ALTADENA	04/14/06	SL	50.00		16	208,760.				208,760.	56,456.		4,175.	60,631.
55	BUILDING--3565 ALTADENA	07/19/07	SL	50.00		16	343,184.				343,184.	84,471.		6,864.	91,335.
79	BUILDING IMPROVEMENT--3547 ALTADENA	04/13/09	SL	50.00		16	5,040.				5,040.	1,110.		101.	1,211.
127	BUILDING -- 4135-4137 54TH PLACE	11/18/13	SL	50.00		16	1,897,470.				1,897,470.	213,895.		37,949.	251,844.
	* 990 PAGE 10 TOTAL BUILDINGS						3,253,954.				3,253,954.	666,787.		65,079.	731,866.
	* 990 PAGE 10 TOTAL -						5,190,538.				5,190,538.	916,684.		114,264.	1,030,948.
	BUILDINGS														
12	IMPROVEMENTS	08/15/05	SL	10.00		16	6,979.				6,979.	6,979.		0.	6,979.
13	IMPROVEMENTS	09/01/05	SL	10.00		16	1,300.				1,300.	1,300.		0.	1,300.
14	IMPROVEMENTS	09/17/05	SL	50.00		16	7,711.				7,711.	2,158.		154.	2,312.
15	IMPROVEMENTS	10/18/05	SL	10.00		16	19,000.				19,000.	19,000.		0.	19,000.

928111 04-01-19

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

Asset No.	Description	Date Acquired	Method	Life	C o n v	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
16	IMPROVEMENTS	12/29/05	SL	10.00		16	1,500.				1,500.	1,500.		0.	1,500.
17	IMPROVEMENTS	01/19/06	SL	10.00		16	1,747.				1,747.	1,747.		0.	1,747.
18	IMPROVEMENTS	05/04/06	SL	50.00		16	2,000.				2,000.	520.		40.	560.
19	IMPROVEMENTS	06/10/06	SL	10.00		16	1,500.				1,500.	1,500.		0.	1,500.
20	IMPROVEMENTS	06/19/06	SL	10.00		16	4,000.				4,000.	4,000.		0.	4,000.
21	IMPROVEMENTS	06/20/06	SL	10.00		16	2,746.				2,746.	2,746.		0.	2,746.
39	IMPROVEMENTS	07/23/06	SL	50.00		16	7,940.				7,940.	2,065.		159.	2,224.
40	IMPROVEMENTS	07/23/06	SL	50.00		16	12,306.				12,306.	3,199.		246.	3,445.
41	IMPROVEMENTS	07/23/06	SL	50.00		16	8,500.				8,500.	2,210.		170.	2,380.
42	IMPROVEMENTS	08/14/06	SL	10.00		16	11,525.				11,525.	11,525.		0.	11,525.
43	IMPROVEMENTS	08/14/06	SL	50.00		16	20,446.				20,446.	5,316.		409.	5,725.
44	IMPROVEMENTS	08/15/06	SL	50.00		16	1,219.				1,219.	315.		24.	339.
45	IMPROVEMENTS	10/10/06	SL	50.00		16	171,937.				171,937.	44,705.		3,439.	48,144.
46	IMPROVEMENTS	10/12/06	SL	50.00		16	16,437.				16,437.	4,275.		329.	4,604.
47	IMPROVEMENTS	10/12/06	SL	10.00		16	1,950.				1,950.	1,950.		0.	1,950.
48	IMPROVEMENTS	11/03/06	SL	50.00		16	1,393.				1,393.	363.		28.	391.
49	IMPROVEMENTS	02/09/07	SL	50.00		16	9,395.				9,395.	2,349.		188.	2,537.
50	IMPROVEMENTS	02/09/07	SL	50.00		16	764.				764.	190.		15.	205.

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

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Asset No.	Description	Date Acquired	Method	Life	C o n v	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
51	IMPROVEMENTS	03/02/07	SL	50.00		16	14,446.				14,446.	3,612.		289.	3,901.
52	IMPROVEMENTS	03/30/07	SL	10.00		16	1,535.				1,535.	1,535.		0.	1,535.
53	IMPROVEMENTS	05/08/07	SL	50.00		16	5,392.				5,392.	1,295.		108.	1,403.
54	IMPROVEMENTS	06/27/07	SL	10.00		16	13,300.				13,300.	13,300.		0.	13,300.
63	IMPROVEMENTS	07/20/07	SL	50.00		16	35,726.				35,726.	8,576.		715.	9,291.
64	IMPROVEMENTS	09/27/07	SL	50.00		16	17,704.				17,704.	4,249.		354.	4,603.
65	IMPROVEMENTS	11/02/07	SL	50.00		16	24,587.				24,587.	5,902.		492.	6,394.
66	IMPROVEMENTS	11/18/07	SL	50.00		16	4,274.				4,274.	1,024.		85.	1,109.
67	IMPROVEMENTS	12/19/07	SL	50.00		16	5,898.				5,898.	1,357.		118.	1,475.
68	IMPROVEMENTS	01/22/08	SL	50.00		16	13,926.				13,926.	3,205.		279.	3,484.
69	IMPROVEMENTS	02/15/08	SL	50.00		16	3,953.				3,953.	909.		79.	988.
70	IMPROVEMENTS	03/07/08	SL	50.00		16	17,368.				17,368.	3,993.		347.	4,340.
71	IMPROVEMENTS	04/02/08	SL	50.00		16	5,713.				5,713.	1,313.		114.	1,427.
72	IMPROVEMENTS	04/14/08	SL	50.00		16	5,983.				5,983.	1,377.		120.	1,497.
73	IMPROVEMENTS	04/17/08	SL	50.00		16	589.				589.	136.		12.	148.
74	IMPROVEMENTS	04/28/08	SL	50.00		16	7,136.				7,136.	1,642.		143.	1,785.
75	IMPROVEMENTS	05/27/08	SL	50.00		16	23,786.				23,786.	5,472.		476.	5,948.
76	IMPROVEMENTS	05/28/08	SL	50.00		16	3,349.				3,349.	770.		67.	837.

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2019 DEPRECIATION AND AMORTIZATION REPORT

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Asset No.	Description	Date Acquired	Method	Life	C o n v	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
77	IMPROVEMENTS	06/10/08	SL	50.00		16	11,913.				11,913.	2,739.		238.	2,977.
80	IMPROVEMENTS	08/06/08	SL	50.00		16	15,039.				15,039.	3,309.		301.	3,610.
81	IMPROVEMENTS	08/15/08	SL	50.00		16	7,601.				7,601.	1,672.		152.	1,824.
82	IMPROVEMENTS	08/22/08	SL	50.00		16	85.				85.	20.		2.	22.
83	IMPROVEMENTS	09/12/08	SL	50.00		16	9,283.				9,283.	2,044.		186.	2,230.
84	IMPROVEMENTS	09/19/08	SL	50.00		16	802.				802.	176.		16.	192.
85	IMPROVEMENTS	10/03/08	SL	50.00		16	701.				701.	155.		14.	169.
86	IMPROVEMENTS	10/16/08	SL	5.00		16	75.				75.	75.		0.	75.
87	IMPROVEMENTS	10/16/08	SL	50.00		16	5,845.				5,845.	1,286.		117.	1,403.
88	IMPROVEMENTS	10/31/08	SL	50.00		16	1,645.				1,645.	362.		33.	395.
89	IMPROVEMENTS	11/10/08	SL	50.00		16	11,185.				11,185.	2,462.		224.	2,686.
90	IMPROVEMENTS	11/21/08	SL	50.00		16	2,209.				2,209.	485.		44.	529.
91	IMPROVEMENTS	12/08/08	SL	50.00		16	804.				804.	177.		16.	193.
92	IMPROVEMENTS	01/26/09	SL	50.00		16	5,000.				5,000.	1,100.		100.	1,200.
93	IMPROVEMENTS	03/19/09	SL	50.00		16	789.				789.	175.		16.	191.
94	IMPROVEMENTS	05/13/09	SL	50.00		16	8,681.				8,681.	1,911.		174.	2,085.
95	IMPROVEMENTS	05/27/09	SL	50.00		16	4,993.				4,993.	1,099.		100.	1,199.
96	IMPROVEMENTS	06/29/09	NC	5.00	HY		-1,413.				-1,413.			0.	

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
98	IMPROVEMENTS	07/28/09	SL	50.00		16	1,000.				1,000.	220.		20.	240.
99	IMPROVEMENTS	07/31/09	SL	5.00		16	-589.				-589.			0.	
100	IMPROVEMENTS	07/31/09	SL	50.00		16	153,116.				153,116.	33,684.		3,062.	36,746.
101	IMPROVEMENTS	08/01/09	SL	50.00		16	6,000.				6,000.	1,200.		120.	1,320.
102	IMPROVEMENTS	09/24/09	SL	50.00		16	4,950.				4,950.	990.		99.	1,089.
103	IMPROVEMENTS	10/09/09	SL	50.00		16	543.				543.	109.		11.	120.
104	IMPROVEMENTS	10/20/09	SL	50.00		16	5,896.				5,896.	1,180.		118.	1,298.
105	IMPROVEMENTS	12/10/09	SL	50.00		16	720.				720.	142.		14.	156.
106	IMPROVEMENTS	12/21/09	SL	50.00		16	6,307.				6,307.	1,261.		126.	1,387.
107	IMPROVEMENTS	01/20/10	SL	50.00		16	460.				460.	91.		9.	100.
108	IMPROVEMENTS	02/03/10	SL	50.00		16	2,500.				2,500.	500.		50.	550.
109	IMPROVEMENTS	02/09/10	SL	50.00		16	4,225.				4,225.	847.		85.	932.
110	IMPROVEMENTS	02/19/10	SL	50.00		16	11,895.				11,895.	2,379.		238.	2,617.
111	IMPROVEMENTS	02/25/10	SL	50.00		16	2,060.				2,060.	411.		41.	452.
112	IMPROVEMENTS	03/11/10	SL	50.00		16	10,417.				10,417.	2,082.		208.	2,290.
123	IMPROVEMENTS	09/10/10	SL	50.00		16	3,250.				3,250.	585.		65.	650.
124	IMPROVEMENTS	11/01/10	SL	50.00		16	5,300.				5,300.	954.		106.	1,060.
142	IMPROVEMENTS	08/01/13	SL	5.00		16	66,726.				66,726.	66,726.		0.	66,726.

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2019 DEPRECIATION AND AMORTIZATION REPORT

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Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
143	IMPROVEMENTS	09/30/13	SL	5.00		16	491.				491.	491.		0.	491.
144	IMPROVEMENTS	10/08/13	NC	.000	HY		-2,238.				-2,238.			0.	
145	IMPROVEMENTS	01/01/14	SL	10.00		16	1,342.				1,342.	743.		134.	877.
146	IMPROVEMENTS	09/25/14	SL	5.00		16	867.				867.	822.		45.	867.
147	IMPROVEMENTS	12/18/14	SL	5.00		16	500.				500.	450.		50.	500.
197	IMPROVEMENTS	07/06/15	SL	7.00		16	4,939.				4,939.	2,765.		706.	3,471.
198	IMPROVEMENTS	08/07/15	SL	7.00		16	1,518.				1,518.	832.		217.	1,049.
199	IMPROVEMENTS	08/10/15	SL	7.00		16	975.				975.	533.		139.	672.
200	IMPROVEMENTS	08/18/15	SL	7.00		16	1,260.				1,260.	690.		180.	870.
201	IMPROVEMENTS	08/26/15	SL	50.00		16	1,435.				1,435.	111.		29.	140.
202	IMPROVEMENTS	09/07/15	SL	7.00		16	739.				739.	396.		106.	502.
203	IMPROVEMENTS	09/07/15	SL	7.00		16	330.				330.	176.		47.	223.
204	IMPROVEMENTS	09/09/15	SL	5.00		16	400.				400.	300.		80.	380.
205	IMPROVEMENTS	09/30/15	SL	50.00		16	33,297.				33,297.	2,497.		666.	3,163.
206	IMPROVEMENTS	02/01/16	SL	50.00		16	33,726.				33,726.	2,250.		675.	2,925.
227	ANNEX REMODEL(ALTA DENA CAMPUS)	09/30/16	SL	50.00		16	16,294.				16,294.	896.		326.	1,222.
228	DOOR	12/20/16	SL	7.00		16	1,140.				1,140.	407.		163.	570.
229	6 WINDOWS	12/23/16	SL	7.00		16	2,533.				2,533.	905.		362.	1,267.

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2019 DEPRECIATION AND AMORTIZATION REPORT

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Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
231	PARKING LOT IMPROVEMENTS AND REPAIRS	08/14/17	SL	7.00		16	12,412.				12,412.	3,546.		1,773.	5,319.
232	ASPHALT OVERLAY FOR GATE REPAIR	08/14/17	SL	7.00		16	2,800.				2,800.	800.		400.	1,200.
233	GREENERY FEE AND LANDFILL REMOVAL OF BRUSH ALTADENA	01/19/18	SL	5.00		16	14.				14.	6.		3.	9.
234	PLAYGROUND REPAIR IMPROVEMENTS	08/14/17	SL	7.00		16	5,184.				5,184.	1,482.		741.	2,223.
235	ART SHED ROOF REPAIR AND FLOORING	11/16/17	SL	7.00		16	8,975.				8,975.	2,564.		1,282.	3,846.
254	CIP TRANSFER FOR ASSETS PLACED IN SERVICE - HS RENOV	07/01/18	SL	50.00		16	85,947.				85,947.	1,576.		1,719.	3,295.
255	ROOF REPAIR FOR MAIN OFFICE, AUDITORIUM, LILAC BLDG, GRAD	10/03/18	SL	7.00		16	2,800.				2,800.	267.		400.	667.
	* 990 PAGE 10 TOTAL BUILDINGS						1,104,653.				1,104,653.	337,692.		25,347.	363,039.
	* 990 PAGE 10 TOTAL -						1,104,653.				1,104,653.	337,692.		25,347.	363,039.
	BUILDINGS														
169	COMMERCIAL KITCHEN REPAIR	09/17/14	SL	10.00		16	2,039.				2,039.	969.		204.	1,173.
170	MUSIC ROOM STORAGE	10/11/14	SL	10.00		16	8,768.				8,768.	4,093.		877.	4,970.
171	INSTALL LOWER PARKING LOT	11/14/14	SL	10.00		16	2,832.				2,832.	1,297.		283.	1,580.
172	REPLACE POST BOLTED TO STAIRS	11/15/14	SL	10.00		16	132.				132.	60.		13.	73.
173	ROOF REPAIR	01/13/15	SL	10.00		16	4,000.				4,000.	1,767.		400.	2,167.
174	ROOF REPAIR	01/21/15	SL	10.00		16	7,158.				7,158.	3,162.		716.	3,878.
226	SPORT COURT(ALTA DENA)	05/31/17	SL	10.00		16	57,772.				57,772.	12,035.		5,777.	17,812.
230	SPORT COURT(ALTA DENA)	07/26/17	SL	10.00		16	7,740.				7,740.	1,548.		774.	2,322.

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2019 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10 990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
256	SOUTH BAY FENCE, INC.	05/29/19	SL	10.00		16	54,335.				54,335.	453.		5,434.	5,887.
257	MODULAR BUILDING CONCEPTS, INC.	01/23/19	SL	10.00		16	16,071.				16,071.	1,473.		1,607.	3,080.
258	CIP TRANSFER FOR ASSETS PLACED IN SERVICE - PORTABLE	06/01/19	SL	10.00		16	59,666.				59,666.	3,481.		5,967.	9,448.
260	SECURITY GATE	10/15/19	SL	7.00		16	3,500.				3,500.			333.	333.
261	ELECTRICAL PANEL UPGRADES	06/29/20	SL	7.00		16	12,400.				12,400.			0.	
262	LOFT BUILT IN EARLY CHILDHOOD CLASSROOM	07/31/19	SL	50.00		16	3,700.				3,700.			68.	68.
	* 990 PAGE 10 TOTAL BUILDINGS						240,113.				240,113.	30,338.		22,453.	52,791.
	* 990 PAGE 10 TOTAL -						240,113.				240,113.	30,338.		22,453.	52,791.
	* GRAND TOTAL 990 PAGE 10 DEPR						6,535,304.				6,535,304.	1,284,714.		162,064.	1,446,778.
	CURRENT YEAR ACTIVITY														
	BEGINNING BALANCE						6,515,388.			0.	6,515,388.	1,284,714.			1,446,330.
	ACQUISITIONS						19,916.			0.	19,916.	0.			448.
	DISPOSITIONS/RETIRED						0.			0.	0.	0.			0.
	ENDING BALANCE						6,535,304.			0.	6,535,304.	1,284,714.			1,446,778.
	ENDING ACCUM DEPR											1,446,778.			
	ENDING BOOK VALUE											5,088,526.			

928111 04-01-19 (D) - Asset disposed * ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

Form **8868**
(Rev. January 2020)
Department of the Treasury
Internal Revenue Service

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

▶ **File a separate application for each return.**
▶ **Go to www.irs.gov/Form8868 for the latest information.**

OMB No. 1545-0047

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit *www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.*

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization or other filer, see instructions. ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO	Taxpayer identification number (TIN) 95-3641387
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 3547 ALTADENA AVENUE	
	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) 0 1

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

- The books are in the care of ▶ KIM GALVIN
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 TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until MAY 17, 2021 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ ☐ calendar year ______ or
▶ ☒ tax year beginning JUL 1, 2019 , and ending JUN 30, 2020 .

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

3a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 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.	3b	$ 0.
c	**Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

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

TAX RETURN FILING INSTRUCTIONS
CALIFORNIA FORM 199

FOR THE YEAR ENDING
June 30, 2020

Prepared For:

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO
3547 ALTADENA AVENUE
SAN DIEGO, CA 92105

Prepared By:

Macias Gini & O'Connell LLP
2029 Century Park East Ste 1500
Los Angeles, CA 90067-2935

To be Signed and Dated By:

Not applicable

Amount of Tax:

Total Tax	$	0
Less: payments and credits	$	0
Plus: other amount	$	0
Plus: interest and penalties	$	0
No payment is required	$	

Overpayment:

Credited to your estimated tax	$	0
Other amount	$	0
Refunded to you	$	0

Make Check Payable To:

Not applicable

Mail Tax Return and Check (if applicable) To:

This return has been prepared for electronic filing. If you wish to have it transmitted electronically to the FTB, please contact our office. We will then submit the electronic return to the FTB. Do not mail the paper copy of the return to the FTB.

Return Must be Mailed On or Before:

Not applicable

Special Instructions:

TAX RETURN FILING INSTRUCTIONS
CALIFORNIA FORM RRF-1

FOR THE YEAR ENDING
June 30, 2020

Prepared For:

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO
3547 ALTADENA AVENUE
SAN DIEGO, CA 92105

Prepared By:

Macias Gini & O'Connell LLP
2029 Century Park East Ste 1500
Los Angeles, CA 90067-2935

Amount of Tax:

Balance due of $150

Make Check Payable To:

Department of Justice

Mail Tax Return To:

Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

Return Must Be Mailed On Or Before:

May 17, 2021

Special Instructions:

The report should be signed and dated by an authorized individual(s).

928941 12-04-19

TAXABLE YEAR **2019**

California Exempt Organization Annual Information Return

FORM **199**

Calendar Year 2019 or fiscal year beginning (mm/dd/yyyy) 07/01/2019 , and ending (mm/dd/yyyy) 06/30/2020 .

Corporation/Organization name: ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO	California corporation number: 0988153
Additional information. See instructions.	FEIN: 95-3641387
Street address (suite or room): 3547 ALTADENA AVENUE	PMB no.
City: SAN DIEGO	State: CA · ZIP code: 92105
Foreign country name · Foreign province/state/county	Foreign postal code

A First Return .... ☐ Yes ☒ No

B Amended Return .... ● ☐ Yes ☒ No

C IRC Section 4947(a)(1) trust .... ☐ Yes ☒ No

D Final Information Return?
● ☐ Dissolved ☐ Surrendered (Withdrawn) ☐ Merged/Reorganized
Enter date: (mm/dd/yyyy) ●

E Check accounting method: (1) ☐ Cash (2) ☒ Accrual (3) ☐ Other

F Federal return filed? (1) ● ☐ 990T (2) ● ☐ 990PF (3) ● ☐ Sch H (990)
(4) ☒ Other 990 series

G Is this a group filing? See instructions .... ● ☐ Yes ☒ No

H Is this organization in a group exemption .... ☐ Yes ☒ No
If "Yes," what is the parent's name?

I Did the organization have any changes to its guidelines not reported to the FTB? See instructions .... ● ☐ Yes ☒ No

J If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. .... ● ☐ Yes ☒ No

K Is the organization exempt under R&TC Section 23701g? ● ☐ Yes ☒ No
If "Yes," enter the gross receipts from nonmember sources $

L If organization is a public charity exempt under R&TC Section 23701d and meets the filing fee exception, check box. No filing fee is required .... ● ☒

M Is the organization a Limited Liability Company? .... ● ☐ Yes ☒ No

N Did the organization file Form 100 or Form 109 to report taxable income? .... ● ☐ Yes ☒ No

O Is the organization under audit by the IRS or has the IRS audited in a prior year? .... ● ☐ Yes ☒ No

P Is federal Form 1023/1024 pending? .... ☐ Yes ☒ No
Date filed with IRS

Part I **Complete Part I unless not required to file this form. See General Information B and C.**

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8	●			1	5,705,999 00
	2	Gross dues and assessments from members and affiliates	●			2	00
	3	Gross contributions, gifts, grants, and similar amounts received STMT 1	●			3	247,577 00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than $50,000, see General Information B	●			4	5,953,576 00
	5	Cost of goods sold STMT 2	●	5	274,748 00		
	6	Cost or other basis, and sales expenses of assets sold	●	6	00		
	7	Total costs. Add line 5 and line 6				7	274,748 00
	8	Total gross income. Subtract line 7 from line 4	●			8	5,678,828 00
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18	●			9	5,881,639 00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8	●			10	-202,811 00
Filing Fee	11	Total payments	●			11	00
	12	Use tax. See General Information K	●			12	00
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11	●			13	00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12	●			14	00
	15	Filing fee $10 or $25. See General Information F				15	N/A 00
	16	Penalties and Interest. See General Information J				16	00
	17	**Balance due.** Add line 12, line 15, and line 16. Then subtract line 11 from the result	●			17	00

Sign Here

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 taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer ▶ | Title: ADMINISTRATOR | Date | ● Telephone

Paid Preparer's Use Only

Preparer's signature ▶ ANDREW J. OZUROVICH | Date: 05/01/21 | Check if self-employed ▶ ☐ | ● PTIN: P00736945

Firm's name (or yours, if self-employed) and address ▶ MACIAS GINI & O'CONNELL LLP
2029 CENTURY PARK EAST STE 1500
LOS ANGELES, CA 90067-2935

● Firm's FEIN: 68-0300457

● Telephone: (310) 277-3373

May the FTB discuss this return with the preparer shown above? See instructions .... ● ☒ Yes ☐ No

ASSOCIATION FOR WALDORF EDUCATION
IN SAN DIEGO

95-3641387

928951 12-04-19

Part II Organizations with gross receipts of more than $50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.

Receipts from Other Sources	1 Gross sales or receipts from all business activities. See instructions	1	420,959	00
	2 Interest	2	269	00
	3 Dividends	3		00
	4 Gross rents	4	27,822	00
	5 Gross royalties	5		00
	6 Gross amount received from sale of assets (See Instructions)	6		00
	7 Other income SEE STATEMENT 3	7	5,256,949	00
	8 **Total** gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	8	5,705,999	00
Expenses and Disbursements	9 Contributions, gifts, grants, and similar amounts paid STATEMENT 4	9	929,374	00
	10 Disbursements to or for members	10		00
	11 Compensation of officers, directors, and trustees SEE STATEMENT 5	11	286,177	00
	12 Other salaries and wages	12	2,564,023	00
	13 Interest	13	600	00
	14 Taxes	14	244,683	00
	15 Rents	15	512,416	00
	16 Depreciation and depletion (See instructions)	16	162,064	00
	17 Other Expenses and Disbursements SEE STATEMENT 6	17	1,182,302	00
	18 **Total** expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	18	5,881,639	00

Schedule L Balance Sheet

	Beginning of taxable year (a)	(b)	End of taxable year (c)	(d)
Assets				
1 Cash		364,287		835,258
2 Net accounts receivable		48,346		96,337
3 Net notes receivable				
4 Inventories		106,756		72,758
5 Federal and state government obligations				
6 Investments in other bonds				
7 Investments in stock				
8 Mortgage loans				
9 Other investments				
10 a Depreciable assets	4,961,592		4,981,508	
b Less accumulated depreciation	(1,284,714)	3,676,878	(1,446,778)	3,534,730
11 Land		1,553,796		1,553,796
12 Other assets STMT 7		34,988		12,491
13 **Total assets**		5,785,051		6,105,370
Liabilities and net worth				
14 Accounts payable		137,524		164,536
15 Contributions, gifts, or grants payable				
16 Bonds and notes payable				
17 Mortgages payable		3,766,544		4,378,678
18 Other liabilities STMT 8		394,941		278,925
19 Capital stock or principal fund				
20 Paid-in or capital surplus. Attach reconciliation				
21 Retained earnings or income fund		1,486,042		1,283,231
22 **Total liabilities and net worth**		5,785,051		6,105,370

Schedule M-1 Reconciliation of income per books with income per return
Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than $50,000.

1 Net income per books	-202,811	7 Income recorded on books this year not included in this return	
2 Federal income tax		8 Deductions in this return not charged against book income this year	
3 Excess of capital losses over capital gains		9 Total. Add line 7 and line 8	
4 Income not recorded on books this year		10 Net income per return. Subtract line 9 from line 6	-202,811
5 Expenses recorded on books this year not deducted in this return			
6 Total. Add line 1 through line 5	-202,811		

CA 199 | CASH CONTRIBUTIONS INCLUDED ON PART I, LINE 3 | STATEMENT 1

CONTRIBUTOR'S NAME	CONTRIBUTOR'S ADDRESS	DATE OF GIFT	AMOUNT
DANA AND JULIE ZEFF	561 MARINA AVE CORONADO, CA 92118		71,955.
THE DAPHNE SEYBOLT CULPEPER MEMORIAL FOUNDATION INC	P.O. BOX 206 NORWALK, CT 06852		35,000.
KATHERINE AND STEPHEN VANCE	2225 SEASIDE ST SAN DIEGO, CA 92107		15,496.
I & G CHARITABLE FOUNDATION	225 W WASHINGTON ST CHICAGO, IL 60606		15,000.
KAROL MILLER AND JOSEPH FELIX	4484 SHELDON DR LE MESA, CA 91941		8,000.
STRAUSS FAMILY FOUNDATION	7887 REVELLE DR LA JOLLA, CA 92037-3539		6,500.
TOTAL INCLUDED ON LINE 3			151,951.

FORM 199 — COST OF GOODS SOLD INCLUDED ON PART I, LINE 5 — STATEMENT 2

COST OF GOODS SOLD

1.	INVENTORY AT BEGINNING OF YEAR		106,756
2.	MERCHANDISE PURCHASED	240,750	
3.	COST OF LABOR		
4.	MATERIALS AND SUPPLIES		
5.	OTHER COSTS		
6.	ADD LINES 1 THROUGH 5		347,506
7.	INVENTORY AT END OF YEAR		72,758
8.	COST OF GOODS SOLD (LINE 6 LESS LINE 7)		274,748

CA 199 — OTHER INCOME — STATEMENT 3

DESCRIPTION	AMOUNT
INSURANCE REIMB & MISC INCOME	172,940.
TUITION	4,794,999.
FIELD TRIP REVENUE	106,824.
EXTENDED CARE	40,355.
SCHOOL FEES	141,831.
TOTAL TO FORM 199, PART II, LINE 7	5,256,949.

CA 199 CASH CONTRIBUTIONS, GIFTS, GRANTS AND SIMILAR AMOUNTS PAID STATEMENT 4

ACTIVITY CLASSIFICATION: TUITION ASSISTANCE

DONEES NAME	DONEES ADDRESS	RELATIONSHIP	AMOUNT
VARIOUS INDIVIDUALS	3547 ALTADENA AVENUE - SAN DIEGO, CA 92105	NONE	929,374.
	TOTAL FOR THIS ACTIVITY		929,374.

TOTAL INCLUDED ON FORM 199, PART II, LINE 9 929,374.

CA 199 COMPENSATION OF OFFICERS, DIRECTORS AND TRUSTEES STATEMENT 5

NAME AND ADDRESS	TITLE AND AVERAGE HRS WORKED/WK	COMPENSATION
KATHERINE GIGLIO 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	TEACHER/BOARD MEMBER 40.00	68,574.
PATRICK GODDARD 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	CHAIR 5.00	0.
DOMINICK ARENA 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	CO-CHAIR 2.00	0.
RACHEL DAVIS 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	ADMINISTRATOR/BOARD MEMBER 40.00	83,107.
JESSICA KRAUS 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	BOARD MEMBER 2.00	0.
LEIGH ELKOLI 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	TREASURER 5.00	0.
KATE VANCE 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	BOARD MEMBER 2.00	0.
CLARE KNAUSS 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	BOARD MEMBER 40.00	64,130.
SUZY BRAMZON 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	BOARD MEMBER 2.00	0.
MARY CARMICHAEL 3547 ALTADENA AVENUE SAN DIEGO, CA 92105	TEACHER/BOARD MEMBER 40.00	70,366.
TOTAL TO FORM 199, PART II, LINE 11		286,177.

CA 199 OTHER EXPENSES STATEMENT 6

DESCRIPTION	AMOUNT
FIELD TRIPS AND CLASSRO	106,775.
MISCELLANEOUS	30,011.
MEMBERSHIP DUES	28,904.
BOARD EXPENSE	6,269.
	0.
DIRECT EXPENSES OF FUNDRAISING EVENTS	35,727.
OTHER EMPLOYEE BENEFITS	503,076.
ACCOUNTING FEES	16,979.
OTHER PROFESSIONAL FEES	53,844.
ADVERTISING AND PROMOTION	13,256.
OFFICE EXPENSES	130,465.
TRAVEL	2,691.
INSURANCE	250,823.
ALL OTHER EXPENSES	3,482.
TOTAL TO FORM 199, PART II, LINE 17	1,182,302.

CA 199 OTHER ASSETS STATEMENT 7

DESCRIPTION	BEG. OF YEAR	END OF YEAR
PREPAID EXPENSES AND DEFERRED CHARGES	34,988.	12,491.
TOTAL TO FORM 199, SCHEDULE L, LINE 12	34,988.	12,491.

CA 199 OTHER LIABILITIES STATEMENT 8

DESCRIPTION	BEG. OF YEAR	END OF YEAR
ACCRUED LIABILITIES	16,914.	16,330.
DEFERRED REVENUE	378,027.	262,595.
TOTAL TO FORM 199, SCHEDULE L, LINE 18	394,941.	278,925.

TAXABLE YEAR **2019**

Corporation Depreciation and Amortization

CALIFORNIA FORM **3885**

Attach to Form 100 or Form 100W. FORM 199 FEIN 95-3641387

Corporation name: ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO

California corporation number: 0988153

Part I Election To Expense Certain Property Under IRC Section 179

1	Maximum deduction under IRC Section 179 for California	1	$25,000
2	Total cost of IRC Section 179 property placed in service	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation	3	$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-	5	

	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
6			

7	Listed property (elected IRC Section 179 cost)	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7	8	
9	Tentative deduction. Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from prior taxable years	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2020. Add line 9 and line 10, less line 12	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
14							
SEE STATEMENT 9		6,541,198.	1,284,714.				

15 Add the amounts in column (g) and column (h). The total of column (h) may not exceed $2,000. See instructions for line 14, column (h) — 15 — 162,064

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) **or** Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) **or** Depreciation (if no election is made), enter the amount from line 15, column (g)	16	162,064
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22	17	162,064
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.)	18	0

Part IV Amortization

(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC Section (see instructions)	(f) Period or percentage	(g) Amortization for this year
19						

20	Total. Add the amounts in column (g)	20	
21	Total amortization claimed for federal purposes from federal Form 4562, line 44	21	
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12	22	

CA 3885 DEPRECIATION STATEMENT 9

ASSET NO./ DESCRIPTION	DATE IN SERVICE	COST OR BASIS	PRIOR DEPR	METHOD	LIFE	DEPRE-CIATION	BONUS
1 BUILDING—3547 ALTADENA	09/29/99	590,740.	254,398.	SL	50.00	11,815.	
2 LAND—3547 ALTADENA	09/29/99	147,685.		L		0.	
3 BUILDING—3539 ALTADENA	04/14/06	208,760.	56,457.	SL	50.00	4,175.	
4 BUILDING—3541 ALTADENA	04/14/06	208,760.	56,456.	SL	50.00	4,175.	
5 2ND GRADE CHAIRS	08/25/05	1,496.	1,496.	SL	5.00	0.	
6 PHONE SYSTEM	08/25/05	3,250.	3,250.	SL	10.00	0.	
7 PHONE UPGRADE	09/13/05	1,467.	1,467.	SL	10.00	0.	
8 PHONE UPGRADE	10/03/05	2,250.	2,250.	SL	10.00	0.	
9 AUDITORIUM BENCHES	01/30/06	1,000.	1,000.	SL	5.00	0.	
10 BIRCH EURHMY FLOOR	06/14/06	20,493.	13,321.	SL	20.00	1,025.	
11 OFFICE RE-CARPET	06/23/06	1,441.	1,441.	SL	5.00	0.	
12 IMPROVEMENTS	08/15/05	6,979.	6,979.	SL	10.00	0.	
13 IMPROVEMENTS	09/01/05	1,300.	1,300.	SL	10.00	0.	
14 IMPROVEMENTS	09/17/05	7,711.	2,158.	SL	50.00	154.	
15 IMPROVEMENTS	10/18/05	19,000.	19,000.	SL	10.00	0.	
16 IMPROVEMENTS	12/29/05	1,500.	1,500.	SL	10.00	0.	
17 IMPROVEMENTS	01/19/06	1,747.	1,747.	SL	10.00	0.	
18 IMPROVEMENTS	05/04/06	2,000.	520.	SL	50.00	40.	
19 IMPROVEMENTS	06/10/06	1,500.	1,500.	SL	10.00	0.	
20 IMPROVEMENTS	06/19/06	4,000.	4,000.	SL	10.00	0.	
21 IMPROVEMENTS	06/20/06	2,746.	2,746.	SL	10.00	0.	
22 VACANY LOT ALTADENA	02/09/06	213,403.		L		0.	
23 LAND—3539 ALTADENA	04/14/06	52,192.		L		0.	
24 LAND—3541 ALTADENA	04/14/06	52,190.		L		0.	
25 SEA CARGO CONTAINER	07/23/06	800.	800.	SL	5.00	0.	
26 FURNITURE& KITCHEN SUPPLIES	08/14/06	1,368.	1,368.	SL	5.00	0.	
27 AUDITORIUM FOLDING CHAIRS	09/06/06	592.	592.	SL	5.00	0.	

28 TABLE						
	09/14/06	790.	790.	SL	5.00	0.
29 3 CABINETS						
	09/19/06	1,200.	1,200.	SL	5.00	0.
30 38 CHAIRS						
	09/19/06	1,900.	1,900.	SL	5.00	0.
31 CHAIRS						
	09/28/06	3,019.	3,019.	SL	5.00	0.
32 FAST SIGNS						
	09/28/06	800.	800.	SL	5.00	0.
33 CHALKBOARDS						
	09/28/06	1,258.	1,258.	SL	5.00	0.
34 LIVE WIRE COMMUNICATIONS						
	10/04/06	1,298.	1,298.	SL	10.00	0.
35 BENCHES						
	10/10/06	790.	790.	SL	5.00	0.
36 FAST SIGNS						
	11/03/06	1,394.	1,394.	SL	5.00	0.
37 COMPUTERS						
	02/27/07	1,608.	1,608.	SL	5.00	0.
38 WEBSITE						
	03/30/07	4,150.	4,150.	SL	5.00	0.
39 IMPROVEMENTS						
	07/23/06	7,940.	2,065.	SL	50.00	159.
40 IMPROVEMENTS						
	07/23/06	12,306.	3,199.	SL	50.00	246.
41 IMPROVEMENTS						
	07/23/06	8,500.	2,210.	SL	50.00	170.
42 IMPROVEMENTS						
	08/14/06	11,525.	11,525.	SL	10.00	0.
43 IMPROVEMENTS						
	08/14/06	20,446.	5,316.	SL	50.00	409.
44 IMPROVEMENTS						
	08/15/06	1,219.	315.	SL	50.00	24.
45 IMPROVEMENTS						
	10/10/06	171,937.	44,705.	SL	50.00	3,439.
46 IMPROVEMENTS						
	10/12/06	16,437.	4,275.	SL	50.00	329.
47 IMPROVEMENTS						
	10/12/06	1,950.	1,950.	SL	10.00	0.
48 IMPROVEMENTS						
	11/03/06	1,393.	363.	SL	50.00	28.
49 IMPROVEMENTS						
	02/09/07	9,395.	2,349.	SL	50.00	188.
50 IMPROVEMENTS						
	02/09/07	764.	190.	SL	50.00	15.
51 IMPROVEMENTS						
	03/02/07	14,446.	3,612.	SL	50.00	289.
52 IMPROVEMENTS						
	03/30/07	1,535.	1,535.	SL	10.00	0.
53 IMPROVEMENTS						
	05/08/07	5,392.	1,295.	SL	50.00	108.
54 IMPROVEMENTS						
	06/27/07	13,300.	13,300.	SL	10.00	0.
55 BUILDING—3565 ALTADENA						
	07/19/07	343,184.	84,471.	SL	50.00	6,864.
56 WEBSITE						
	07/31/07	1,490.	1,490.	SL	5.00	0.
57 NEW CHAIRS/TABLES						
	08/06/07	3,446.	3,446.	SL	5.00	0.

58 CHAIRS						
	08/06/07	2,621.	2,621.	SL	5.00	0.
59 TRAKWARE INC						
	12/07/07	3,363.	3,363.	SL	5.00	0.
60 SWING SET						
	10/12/07	701.	701.	SL	5.00	0.
61 SPACE ARCH						
	01/30/08	1,450.	1,450.	SL	5.00	0.
62 TRAKWARE INC						
	04/28/08	2,435.	2,435.	SL	5.00	0.
63 IMPROVEMENTS						
	07/20/07	35,726.	8,576.	SL	50.00	715.
64 IMPROVEMENTS						
	09/27/07	17,704.	4,249.	SL	50.00	354.
65 IMPROVEMENTS						
	11/02/07	24,587.	5,902.	SL	50.00	492.
66 IMPROVEMENTS						
	11/18/07	4,274.	1,024.	SL	50.00	85.
67 IMPROVEMENTS						
	12/19/07	5,898.	1,357.	SL	50.00	118.
68 IMPROVEMENTS						
	01/22/08	13,926.	3,205.	SL	50.00	279.
69 IMPROVEMENTS						
	02/15/08	3,953.	909.	SL	50.00	79.
70 IMPROVEMENTS						
	03/07/08	17,368.	3,993.	SL	50.00	347.
71 IMPROVEMENTS						
	04/02/08	5,713.	1,313.	SL	50.00	114.
72 IMPROVEMENTS						
	04/14/08	5,983.	1,377.	SL	50.00	120.
73 IMPROVEMENTS						
	04/17/08	589.	136.	SL	50.00	12.
74 IMPROVEMENTS						
	04/28/08	7,136.	1,642.	SL	50.00	143.
75 IMPROVEMENTS						
	05/27/08	23,786.	5,472.	SL	50.00	476.
76 IMPROVEMENTS						
	05/28/08	3,349.	770.	SL	50.00	67.
77 IMPROVEMENTS						
	06/10/08	11,913.	2,739.	SL	50.00	238.
78 LAND——3565 ALTADENA						
	07/19/07	85,796.		L		0.
79 BUILDING IMPROVEMENT——3547 ALTADENA						
	04/13/09	5,040.	1,110.	SL	50.00	101.
80 IMPROVEMENTS						
	08/06/08	15,039.	3,309.	SL	50.00	301.
81 IMPROVEMENTS						
	08/15/08	7,601.	1,672.	SL	50.00	152.
82 IMPROVEMENTS						
	08/22/08	85.	20.	SL	50.00	2.
83 IMPROVEMENTS						
	09/12/08	9,283.	2,044.	SL	50.00	186.
84 IMPROVEMENTS						
	09/19/08	802.	176.	SL	50.00	16.
85 IMPROVEMENTS						
	10/03/08	701.	155.	SL	50.00	14.
86 IMPROVEMENTS						
	10/16/08	75.	75.	SL	5.00	0.
87 IMPROVEMENTS						
	10/16/08	5,845.	1,286.	SL	50.00	117.

88 IMPROVEMENTS						
	10/31/08	1,645.	362.	SL	50.00	33.
89 IMPROVEMENTS						
	11/10/08	11,185.	2,462.	SL	50.00	224.
90 IMPROVEMENTS						
	11/21/08	2,209.	485.	SL	50.00	44.
91 IMPROVEMENTS						
	12/08/08	804.	177.	SL	50.00	16.
92 IMPROVEMENTS						
	01/26/09	5,000.	1,100.	SL	50.00	100.
93 IMPROVEMENTS						
	03/19/09	789.	175.	SL	50.00	16.
94 IMPROVEMENTS						
	05/13/09	8,681.	1,911.	SL	50.00	174.
95 IMPROVEMENTS						
	05/27/09	4,993.	1,099.	SL	50.00	100.
96 IMPROVEMENTS						
	06/29/09	0.			5.00	0.
97 DISCOUNT SCHOOL						
	09/23/09	2,135.	2,135.	SL	5.00	0.
98 IMPROVEMENTS						
	07/28/09	1,000.	220.	SL	50.00	20.
99 IMPROVEMENTS						
	07/31/09	0.		SL	5.00	0.
100 IMPROVEMENTS						
	07/31/09	153,116.	33,684.	SL	50.00	3,062.
101 IMPROVEMENTS						
	08/01/09	6,000.	1,200.	SL	50.00	120.
102 IMPROVEMENTS						
	09/24/09	4,950.	990.	SL	50.00	99.
103 IMPROVEMENTS						
	10/09/09	543.	109.	SL	50.00	11.
104 IMPROVEMENTS						
	10/20/09	5,896.	1,180.	SL	50.00	118.
105 IMPROVEMENTS						
	12/10/09	720.	142.	SL	50.00	14.
106 IMPROVEMENTS						
	12/21/09	6,307.	1,261.	SL	50.00	126.
107 IMPROVEMENTS						
	01/20/10	460.	91.	SL	50.00	9.
108 IMPROVEMENTS						
	02/03/10	2,500.	500.	SL	50.00	50.
109 IMPROVEMENTS						
	02/09/10	4,225.	847.	SL	50.00	85.
110 IMPROVEMENTS						
	02/19/10	11,895.	2,379.	SL	50.00	238.
111 IMPROVEMENTS						
	02/25/10	2,060.	411.	SL	50.00	41.
112 IMPROVEMENTS						
	03/11/10	10,417.	2,082.	SL	50.00	208.
113 FENCE EXPANSION						
	07/30/10	1,900.	1,900.	SL	10.00	0.
114 SCIENCE TABLE						
	08/13/10	5,064.	5,064.	SL	5.00	0.
115 11 WOODEN CHAIRS						
	09/10/10	1,854.	1,854.	SL	5.00	0.
116 8 STUDENT DESKS						
	09/10/10	960.	960.	SL	5.00	0.
117 EQUIPMENT						
	09/27/10	1,689.	1,689.	SL	5.00	0.

118 BIZCHAIR FURNITURE						
	10/11/10	552.	552.	SL	5.00	0.
119 DELL IT						
	10/11/10	2,040.	2,040.	SL	5.00	0.
120 EQUIPMENT						
	01/12/11	2,375.	2,375.	SL	5.00	0.
121 TABLE/BECH						
	03/03/11	601.	601.	SL	5.00	0.
122 STACKING CHAIRS						
	03/03/11	796.	796.	SL	5.00	0.
123 IMPROVEMENTS						
	09/10/10	3,250.	585.	SL	50.00	65.
124 IMPROVEMENTS						
	11/01/10	5,300.	954.	SL	50.00	106.
125 WASHER/DRYER						
	11/13/12	1,346.	1,346.	SL	5.00	0.
126 CIRCULAR SAW						
	03/07/13	678.	678.	SL	5.00	0.
127 BUILDING —— 4135—4137 54TH PLACE						
	11/18/13	1,897,470.	213,895.	SL	50.00	37,949.
128 LAND —— 4135—4137 54TH PLACE						
	11/18/13	1,002,530.		L		0.
129 ASUS H61M-PLUS DESTOP						
	08/28/13	2,422.	2,422.	SL	5.00	0.
130 CHAIRS COLINA CAMPUS						
	08/12/13	951.	951.	SL	5.00	0.
131 FOLDING CHAIRS - COLINA CAMPUS						
	08/12/13	799.	799.	SL	5.00	0.
132 CHALKBOARDS —— COLINA CAMPUS						
	08/12/13	979.	979.	SL	5.00	0.
133 ACER ASPIRE —— V5471P						
	09/03/13	789.	789.	SL	5.00	0.
134 PRINTER						
	10/09/13	809.	809.	SL	5.00	0.
135 SCANNER						
	11/01/13	475.	475.	SL	5.00	0.
136 WINTER FAIRE SUPPLIES						
	01/01/14	8,093.	8,093.	SL	5.00	0.
137 50 METAL FOLDING CHAIRS						
	01/22/14	688.	688.	SL	5.00	0.
138 50 METAL FOLDING CHAIRS						
	01/22/14	687.	687.	SL	5.00	0.
139 SCRIP PRINTER						
	03/01/14	325.	325.	SL	5.00	0.
140 CREDIT CARD TERMINAL						
	03/03/14	678.	678.	SL	5.00	0.
141 WOODCREST CHAIR						
	06/18/14	151.	151.	SL	5.00	0.
142 IMPROVEMENTS						
	08/01/13	66,726.	66,726.	SL	5.00	0.
143 IMPROVEMENTS						
	09/30/13	491.	491.	SL	5.00	0.
144 IMPROVEMENTS						
	10/08/13	0.			.000	0.
145 IMPROVEMENTS						
	01/01/14	1,342.	743.	SL	10.00	134.
146 IMPROVEMENTS						
	09/25/14	867.	822.	SL	5.00	45.
147 IMPROVEMENTS						
	12/18/14	500.	450.	SL	5.00	50.

148 CONTAINER						
	07/01/14	500.	500.	SL	5.00	0.
149 SOLAR EXPENDITURE						
	07/01/14	22,772.	21,289.	SL	5.00	0.
150 CABINETS						
	07/09/14	351.	351.	SL	5.00	0.
151 30 DESKES						
	07/15/14	6,105.	6,003.	SL	5.00	102.
152 CHAIRS FOR MUSIC ROOM						
	08/11/14	1,552.	1,499.	SL	5.00	26.
153 6 FOLDING TABLES						
	08/13/14	548.	531.	SL	5.00	9.
154 WARDROBS						
	08/18/14	952.	919.	SL	5.00	33.
155 USMARKER BOARD						
	08/20/14	547.	527.	SL	5.00	20.
156 TABLES & STOOLS						
	08/22/14	2,725.	2,634.	SL	5.00	91.
157 CLASSROOM FURNITURE						
	08/23/14	5,745.	5,554.	SL	5.00	191.
158 BLACKBOARDS						
	08/27/14	756.	730.	SL	5.00	26.
159 ASUS DESKTOP MOTHERBOARD						
	08/29/14	1,592.	1,537.	SL	5.00	55.
160 IKEA FURNITURE082714						
	08/30/14	470.	454.	SL	5.00	16.
161 FURNITURE & FIXTURE						
	09/05/14	0.			.000	0.
162 12X12 COLEMAN TENT						
	09/10/14	580.	551.	SL	5.00	19.
163 FUJITSU SNAPSCAN SCANNER						
	09/10/14	968.	921.	SL	5.00	32.
164 DESKTOP MOTHERBOARD						
	12/09/14	2,511.	2,259.	SL	5.00	209.
165 COMMERCIAL GRILL						
	12/12/14	400.	360.	SL	5.00	33.
166 COMPUTER HARDWARE & SOFTWARE						
	02/17/15	1,062.	919.	SL	5.00	143.
167 SECURITY CAMERA SYSTEMS						
	03/27/15	7,913.	5,928.	SL	5.00	1,187.
168 EQUIPMENT						
	06/30/15	13,000.	9,100.	SL	5.00	2,600.
169 COMMERCIAL KITCHEN REPAIR						
	09/17/14	2,039.	969.	SL	10.00	204.
170 MUSIC ROOM STORAGE						
	10/11/14	8,768.	4,093.	SL	10.00	877.
171 INSTALL LOWER PARKING LOT						
	11/14/14	2,832.	1,297.	SL	10.00	283.
172 REPLACE POST BOLTED TO STAIRS						
	11/15/14	132.	60.	SL	10.00	13.
173 ROOF REPAIR						
	01/13/15	4,000.	1,767.	SL	10.00	400.
174 ROOF REPAIR						
	01/21/15	7,158.	3,162.	SL	10.00	716.
175 SECURITY SYSTEM						
	07/01/15	10,777.	8,441.	SL	5.00	2,155.
176 FURNITURE & FIXTURE						
	08/13/15	508.	391.	SL	5.00	102.
177 BOOKSHELVES						
	08/21/15	264.	203.	SL	5.00	53.

178 2 NEC DSX 34 BUTTON TELEPHONE SET						
	08/26/15	259.	199.	SL	5.00	52.
179 REFRIGERATOR						
	08/30/15	1,336.	1,024.	SL	5.00	267.
180 NEC DSX 34 BUTTON TELEPHONE						
	09/01/15	319.	240.	SL	5.00	64.
181 STUDENT CHAIRS						
	09/03/15	1,064.	799.	SL	5.00	213.
182 BACKYARD ADVENTURES						
	09/04/15	1,825.	1,369.	SL	5.00	365.
183 18000 BTU A/C UNIT						
	09/09/15	3,289.	2,468.	SL	5.00	658.
184 CHAIRS FOR FACULTY LOUNGE						
	09/12/15	82.	60.	SL	5.00	16.
185 6 DESKTOP COMPUTERS						
	09/14/15	4,745.	3,559.	SL	5.00	949.
186 TABLE FOR KITCHEN						
	09/14/15	209.	157.	SL	5.00	42.
187 FURNITURE FOR FIBER ROOM						
	09/23/15	238.	180.	SL	5.00	48.
188 UAP-LR 2.4 ACCESS POINT WIRELSS						
	10/05/15	396.	290.	SL	5.00	79.
189 5 PORT NETWORK SWITCH						
	10/05/15	737.	539.	SL	5.00	147.
190 2 COMPUTERS						
	10/30/15	1,593.	1,169.	SL	5.00	319.
191 COMPUTER MONITOR						
	11/10/15	144.	104.	SL	5.00	29.
192 BUS OFFICE DESK						
	11/18/15	119.	86.	SL	5.00	24.
193 NEC DESK PHONE						
	12/04/15	199.	140.	SL	5.00	40.
194 QQEST SOFTWARE SYSTEM						
	06/21/16	4,082.	2,448.	SL	5.00	816.
195 5 COMPUTERS						
	06/30/16	1,782.	712.	SL	5.00	356.
196 CHALKBOARDS						
	06/30/16	11,830.	7,098.	SL	5.00	2,366.
197 IMPROVEMENTS						
	07/06/15	4,939.	2,765.	SL	7.00	706.
198 IMPROVEMENTS						
	08/07/15	1,518.	832.	SL	7.00	217.
199 IMPROVEMENTS						
	08/10/15	975.	533.	SL	7.00	139.
200 IMPROVEMENTS						
	08/18/15	1,260.	690.	SL	7.00	180.
201 IMPROVEMENTS						
	08/26/15	1,435.	111.	SL	50.00	29.
202 IMPROVEMENTS						
	09/07/15	739.	396.	SL	7.00	106.
203 IMPROVEMENTS						
	09/07/15	330.	176.	SL	7.00	47.
204 IMPROVEMENTS						
	09/09/15	400.	300.	SL	5.00	80.
205 IMPROVEMENTS						
	09/30/15	33,297.	2,497.	SL	50.00	666.
206 IMPROVEMENTS						
	02/01/16	33,726.	2,250.	SL	50.00	675.
207 VOLKSWAGON VAN #1						
	10/30/15	15,131.	11,114.	SL	5.00	3,026.

208 VOLKSWAGON VAN #2						
	10/30/15	15,131.	11,104.	SL	5.00	3,026.
209 VOLKSWAGON VAN #3						
	10/30/15	15,131.	11,105.	SL	5.00	3,026.
210 SWITCH						
	07/26/16	1,080.	630.	SL	5.00	216.
211 BADGE PRINTER AND PORTABLE MONITORS						
	11/30/16	1,190.	615.	SL	5.00	238.
212 PRINTER						
	12/28/16	900.	450.	SL	5.00	180.
213 IPAD AND MOUNT						
	12/31/16	860.	430.	SL	5.00	172.
214 WATER COOLER						
	12/31/16	781.	390.	SL	5.00	156.
215 IPAD LOCK BOXES						
	03/27/17	225.	101.	SL	5.00	45.
216 FURNITURE & FIXTURE						
	06/30/17	2,928.	1,172.	SL	5.00	586.
217 HVAC UNIT						
	06/30/17	6,350.	2,540.	SL	5.00	1,270.
218 METAL LUCH TRAYS						
	06/30/17	550.	220.	SL	5.00	110.
219 KITCHEN EQUIPMENTS						
	06/30/17	1,112.	444.	SL	5.00	222.
220 STAINLESS STEELE SERVING TRAYS						
	06/30/17	760.	304.	SL	5.00	152.
221 TOOLS						
	06/30/17	1,549.	620.	SL	5.00	310.
222 FURNITURE & FIXTURE						
	06/30/17	3,774.	1,510.	SL	5.00	755.
223 TOOLS						
	06/30/17	384.	154.	SL	5.00	77.
224 SERVER						
	06/30/17	1,125.	450.	SL	5.00	225.
225 IT EQUIPMENT						
	06/30/17	2,597.	1,038.	SL	5.00	519.
226 SPORT COURT(ALTA DENA)						
	05/31/17	57,772.	12,035.	SL	10.00	5,777.
227 ANNEX REMODEL(ALTA DENA CAMPUS)						
	09/30/16	16,294.	896.	SL	50.00	326.
228 DOOR						
	12/20/16	1,140.	407.	SL	7.00	163.
229 6 WINDOWS						
	12/23/16	2,533.	905.	SL	7.00	362.
230 SPORT COURT(ALTA DENA)						
	07/26/17	7,740.	1,548.	SL	10.00	774.
231 PARKING LOT IMPROVEMENTS AND REPAIRS						
	08/14/17	12,412.	3,546.	SL	7.00	1,773.
232 ASPHALT OVERLAY FOR GATE REPAIR						
	08/14/17	2,800.	800.	SL	7.00	400.
233 GREENERY FEE AND LANDFILL REMOVAL OF BRUSH ALTADENA						
	01/19/18	14.	6.	SL	5.00	3.
234 PLAYGROUND REPAIR IMPROVEMENTS						
	08/14/17	5,184.	1,482.	SL	7.00	741.
235 ART SHED ROOF REPAIR AND FLOORING						
	11/16/17	8,975.	2,564.	SL	7.00	1,282.
236 10 4 FT WOOD FOLDING TABLES FOR HIGH SCHOOL						
	06/30/18	534.		SL	5.00	107.
237 FIRE ALARM CONTROL PANEL						
	06/30/18	974.		SL	5.00	195.

238	HD DOME CAMERA	06/30/18	307.		SL	5.00	61.
239	EQUIPMENT	06/30/18	180.		SL	5.00	36.
240	COMPUTER PURCHASE	06/30/18	927.		SL	5.00	185.
241	SERVER HDD - 73GB 1500K SAS	06/30/18	214.		SL	5.00	43.
242	REPLACEMENT SERVER	06/30/18	539.		SL	5.00	108.
243	TERMINAL SERVER TO HOUSE QUICKBOOKS	06/30/18	1,701.		SL	5.00	340.
244	EQUIPMENT	06/30/18	886.		SL	5.00	177.
245	LAPTOP COMPUTER	06/30/18	793.		SL	5.00	159.
246	EQUIPMENT	06/30/18	2,775.		SL	5.00	555.
247	PHONE EQUIPMENT	06/30/18	307.		SL	5.00	61.
248	TOOLS	06/30/18	1,039.		SL	5.00	208.
249	FREEZER FOR COMMERCIAL KTICHEN	01/24/19	896.	75.	SL	5.00	179.
250	WOOD CABINETS FOR NEW KG	07/17/18	2,925.	536.	SL	5.00	585.
251	NEW FLOORING FOR VARIOUS CLASSROOMS	01/01/19	13,019.	1,302.	SL	5.00	2,604.
252	JDELGADO ELECTRIC - NEW LIGHTING SYSTEM	03/06/19	34,619.	3,462.	SL	5.00	6,924.
253	FORD T350	05/03/19	25,381.	423.	SL	5.00	5,076.
254	CIP TRANSFER FOR ASSETS PLACED IN SERVICE - HS RENOVATIONS	07/01/18	85,947.	1,576.	SL	50.00	1,719.
255	ROOF REPAIR FOR MAIN OFFICE, AUDITORIUM, LILAC BLDG, GRADE 1 BLDG, M	10/03/18	2,800.	267.	SL	7.00	400.
256	SOUTH BAY FENCE, INC.	05/29/19	54,335.	453.	SL	10.00	5,434.
257	MODULAR BUILDING CONCEPTS, INC.	01/23/19	16,071.	1,473.	SL	10.00	1,607.
258	CIP TRANSFER FOR ASSETS PLACED IN SERVICE - PORTABLE KG CLASSROOM	06/01/19	59,666.	3,481.	SL	10.00	5,967.
259	DEEP FREEZER	03/12/20	316.		SL	5.00	47.
260	SECURITY GATE	10/15/19	3,500.		SL	7.00	333.
261	ELECTRICAL PANEL UPGRADES	06/29/20	12,400.		SL	7.00	0.
262	LOFT BUILT IN EARLY CHILDHOOD CLASSROOM	07/31/19	3,700.		SL	50.00	68.
263	FURNITURE & FIXTURE	07/31/18	0.	4,932.		.000	2,247.
	TOTAL TO FORM 3885		6,541,198.	1284714.			162,064.

Date Accepted ____________________

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR **2019**

California e-file Return Authorization for Exempt Organizations

FORM **8453-EO**

Exempt Organization name	Identifying number
ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO	95-3641387

Part I Electronic Return Information (whole dollars only)

1	Total gross receipts (Form 199, line 4)	1	5,953,576
2	Total gross income (Form 199, line 8)	2	5,678,828
3	Total expenses and disbursements (Form 199, line 9)	3	5,881,639

Part II Settle Your Account Electronically for Taxable Year 2019

4 ☐ Electronic funds withdrawal 4a Amount 4b Withdrawal date (mm/dd/yyyy)

Part III Banking Information (Have you verified the exempt organization's banking information?)

5 Routing number

6 Account number 7 Type of account: ☐ Checking ☐ Savings

Part IV Declaration of Officer

I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, Box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2019 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

Sign Here Signature of officer ____ Date ____ Title ADMINISTRATOR

Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer.

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2019 Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

ERO Must Sign

ERO's signature	Date	Check if also paid preparer	Check if self-employed	ERO's PTIN
MACIAS GINI & O'CONNELL LLP		X	☐	P00736945

Firm's name (or yours if self-employed) and address	
MACIAS GINI & O'CONNELL LLP	Firm's FEIN 68-0300457
2029 CENTURY PARK EAST STE 1500 LOS ANGELES, CA	ZIP code 90067-2935

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

Paid Preparer Must Sign

Paid preparer's signature	Date	Check if self-employed	Paid preparer's PTIN
		☐	

Firm's name (or yours if self-employed) and address	
	Firm's FEIN
	ZIP code

For Privacy Notice, get FTB 1131 ENG/SP.

FTB 8453-EO 2019

929021 11-08-19

17210501 759947 WLADORFEDU 2019.05092 ASSOCIATION FOR WALDORF E WLADORF1

STATE OF CALIFORNIA
RRF-1
(Rev. 09/2017)

MAIL TO:
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

STREET ADDRESS:
1300 I Street
Sacramento, CA 95814
(916)210-6400

WEBSITE ADDRESS:
www.oag.ca.gov/charities

ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

Section 12586 and 12587, California Government Code
11 Cal. Code Regs. section 301-307, 311 and 312

Failure to submit this report annually no later than four months and fifteen days after the end of the organization's accounting period may result in the loss of tax exemption and the assessment of a minimum tax of $800, plus interest, and/or fines or filing penalties. Revenue & Taxation Code section 23703; Government Code section 12586.1. IRS extensions will be honored.

(For Registry Use Only)

ASSOCIATION FOR WALDORF EDUCATION IN SAN DIEGO
Name of Organization

List all DBAs and names the organization uses or has used

3547 ALTADENA AVENUE
Address (Number and Street)

SAN DIEGO, CA 92105
City or Town, State, and ZIP Code

619-287-3054
Telephone Number

E-mail Address

Check if:
☐ Change of address
☐ Amended report

State Charity Registration Number CT 041463

Corporation or Organization No. 0988153

Federal Employer ID No. 95-3641387

ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311, and 312)
Make Check Payable to Department of Justice

Gross Annual Revenue	Fee	Gross Annual Revenue	Fee	Gross Annual Revenue	Fee
Less than $25,000	0	Between $100,001 and $250,000	$50	Between $1,000,001 and $10 million	$150
Between $25,000 and $100,000	$25	Between $250,001 and $1 million	$75	Between $10,000,001 and $50 million	$225
				Greater than $50 million	$300

PART A - ACTIVITIES

For your most recent full accounting period (beginning 07/01/2019 ending 06/30/2020) list:

Gross Annual Revenue $ 5,643,101 Noncash Contributions $ 0 Total Assets $ 6,105,370

Program Expenses $ 4,844,299 Total Expenses $ 5,845,912

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: All questions must be answered. If you answer "yes" to any of the questions below, you must attach a separate page providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

		Yes	No
1.	During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof, either directly or with an entity in which any such officer, director or trustee had any financial interest?		X
2.	During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds?		X
3.	During this reporting period, were any organization funds used to pay any penalty, fine or judgment?		X
4.	During this reporting period, were the services of a commercial fundraiser, fundraising counsel for charitable purposes, or commercial coventurer used?		X
5.	During this reporting period, did the organization receive any governmental funding?		X
6.	During this reporting period, did the organization hold a raffle for charitable purposes?		X
7.	Does the organization conduct a vehicle donation program?		X
8.	Did the organization conduct an independent audit and prepare audited financial statements in accordance with generally accepted accounting principles for this reporting period?	X	
9.	At the end of this reporting period, did the organization hold restricted net assets, while reporting negative unrestricted net assets?		X

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, the content is true, correct and complete, and I am authorized to sign.

Signature of Authorized Agent	Printed Name	Title	Date
	RACHEL DAVIS	ADMINISTRATOR	

929291
01-22-20