August 20, 2026

Ms. Alison Anthony
Tulsa Area United Way
1430 South Boulder
Tulsa, OK 74119

Ms. Alison Anthony:

Enclosed are the original and one copy of the 2025 exempt organization returns, as follows...

2025 Form 990

2025 Oklahoma Form 512E

Each original return should be dated, signed and filed in accordance with the filing instructions. A public disclosure copy is included for your files. Each copy should be retained for your files.

The return was prepared from the information provided by you. As we did not independently verify the data, we suggest that you review the return carefully to be certain there are no omissions or misstatements of material facts.

Instructions covering the signing and filing of each return are attached to your copy of the return.

In the event the return is selected for audit, requests may be made for supporting documentation. As our workpapers contain only a summary of underlying information, all pertinent records should be retained for at least six years.

Thank you for giving us the opportunity to serve you. We appreciate your business and the confidence you place in us. Please contact us if we can be of further assistance.

Sincerely,

Megan Courtney

Megan Courtney

TAX RETURN FILING INSTRUCTIONS

FORM 990

FOR THE YEAR ENDING

December 31, 2025

Prepared For:

Ms. Alison Anthony
Tulsa Area United Way
1430 South Boulder
Tulsa, OK 74119

Prepared By:

HoganTaylor, LLP
2222 S. Utica Place, Suite 200
Tulsa, OK 74114-7002

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-TE 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-TE to us by November 16, 2026.

***** THIS IS NOT A FILEABLE COPY *****

Form **8879-TE**

IRS E-file Signature Authorization for a Tax-Exempt Entity

For calendar year 2025, or fiscal year beginning _____ , 2025, and ending _____ , 20 ___

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

Go to www.irs.gov/Form8879TE for the latest information.

OMB No. 1545-0047

2025

Department of the Treasury
Internal Revenue Service

Name of filer

TULSA AREA UNITED WAY

EIN or SSN

73-0580283

Name and title of officer or person subject to tax

ALISON ANTHONY
PRESIDENT AND CEO

Part I Type of Return and Return Information

Check the box for the return for which you are using this Form 8879-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line **1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a,** or **10a** below, and the amount on that line for the return being filed with this form was blank, then leave line **1b, 2b, 3b, 4b, 5b, 6b, 7b, 8b, 9b,** or **10b,** 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**	28,003,950.
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 V, line 5)	**4b**	
5a	**Form 8868** check here		**b** **Balance due** (Form 8868, line 3c)	**5b**	
6a	**Form 990-T** check here		**b** **Total tax** (Form 990-T, Part III, line 4)	**6b**	
7a	**Form 4720** check here		**b** **Total tax** (Form 4720, Part III, line 1)	**7b**	
8a	**Form 5227** check here		**b** **FMV of assets at end of tax year** (Form 5227, Item D)	**8b**	
9a	**Form 5330** check here		**b** **Tax due** (Form 5330, Part II, line 19)	**9b**	
10a	**Form 8038-CP** check here		**b** **Amount of credit payment requested** (Form 8038-CP, Part III, line 22)	**10b**	

Part II Declaration and Signature Authorization of Officer or Person Subject to Tax

Under penalties of perjury, I declare that [X] I am an officer of the above entity or [ ] I am a person subject to tax with respect to (name of entity) _____ , (EIN) _____ and that I have examined a copy of the 2025 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 electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the 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 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 electronic return and, if applicable, the consent to electronic funds withdrawal.

PIN: check one box only

[X] I authorize HOGANTAYLOR LLP to enter my PIN 80283

ERO firm name

Enter five numbers, but do not enter all zeros

as my signature on the tax year 2025 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 or person subject to tax with respect to the entity, I will enter my PIN as my signature on the tax year 2025 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.

Signature of officer or person subject to tax **** THIS IS NOT A FILEABLE COPY **** 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. 73026775001

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2025 electronically filed return 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 HOGANTAYLOR LLP Date 08/20/26

ERO Must Retain This Form - See Instructions

Do Not Submit This Form to the IRS Unless Requested To Do So

Form **8868**
(Rev. January 2025)

Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return or Excise Taxes Related to Employee Benefit Plans

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 up to a 6-month extension of time to file any of the forms listed below except for Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts. An extension request for Form 8870 must be sent to the IRS in a paper format (see instructions). For more details on the electronic filing of Form 8868, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

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

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.

Part I - Identification

Type or Print

File by the due date for filing your return. See instructions.

Name of exempt organization, employer, or other filer, see instructions.	Taxpayer identification number (TIN)
TULSA AREA UNITED WAY	73-0580283

Number, street, and room or suite no. If a P.O. box, see instructions.
1430 SOUTH BOULDER

City, town or post office, state, and ZIP code. For a foreign address, see instructions.
TULSA, OK 74119

Enter the Return Code for the return that this application is for (file a separate application for each return) 01

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 4720 (other than individual)	09
Form 4720 (individual)	03	Form 5227	10
Form 990-PF	04	Form 6069	11
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 8870	12
Form 990-T (trust other than above)	06	Form 5330 (individual)	13
Form 990-T (corporation)	07	Form 5330 (other than individual)	14
Form 1041-A	08	Form 990-T (governmental entities)	15

- After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330.
- If this application is for an extension of time to file Form 5330, you must enter the following information.

Plan Name _____
Plan Number _____
Plan Year Ending (MM/DD/YYYY)

Part II - Automatic Extension of Time To File for Exempt Organizations (see instructions)

The books are in the care of CARLA MEYER
1430 SOUTH BOULDER - TULSA, OK 74119

Telephone No. 918-583-7171 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 NOVEMBER 15, 20 26, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

☒ calendar year 20 25 or

☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

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

3a	If this application is for Forms 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.

For Privacy Act and Paperwork Reduction Act Notice, see instructions. Form **8868** (Rev. 1-2025)

LHA 523841 04-01-25

EXTENDED TO NOVEMBER 16, 2026

Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2025

Open to Public Inspection

A For the 2025 calendar year, or tax year beginning **and ending**

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

C Name of organization
TULSA AREA UNITED WAY

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) | Room/suite
1430 SOUTH BOULDER

City or town, state or province, country, and ZIP or foreign postal code
TULSA, OK 74119

F Name and address of principal officer: ALISON ANTHONY
SAME AS C ABOVE

D Employer identification number
73-0580283

E Telephone number
918-583-7171

G Gross receipts $ 36,370,409.

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

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

H(c) Group exemption number

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

J Website: WWW.TAUW.ORG

K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other

L Year of formation: 1924 **M** State of legal domicile: OK

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities: THE TULSA AREA UNITED WAY UNITES PEOPLE AND RESOURCES TO IMPROVE LIVES AND STRENGTHEN OUR

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	51
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	50
5	Total number of individuals employed in calendar year 2025 (Part V, line 2a)	5	42
6	Total number of volunteers (estimate if necessary)	6	6903
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.

Revenue

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	27,644,449.	26,913,697.
9	Program service revenue (Part VIII, line 2g)	0.	0.
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	767,399.	870,054.
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	198,774.	220,199.
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	28,610,622.	28,003,950.

Expenses

13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	20,801,894.	20,658,637.
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)	4,373,033.	4,790,526.
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
b	Total fundraising expenses (Part IX, column (D), line 25) 2,360,626.		
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	2,536,159.	2,183,745.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	27,711,086.	27,632,908.
19	Revenue less expenses. Subtract line 18 from line 12	899,536.	371,042.

Net Assets or Fund Balances

		Beginning of Current Year	End of Year
20	Total assets (Part X, line 16)	39,871,790.	40,106,143.
21	Total liabilities (Part X, line 26)	19,592,230.	19,293,577.
22	Net assets or fund balances. Subtract line 21 from line 20	20,279,560.	20,812,566.

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

ALISON ANTHONY, PRESIDENT AND CEO
Type or print name and title

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	Check if self-employed	PTIN
MEGAN COURTNEY	MEGAN COURTNEY	08/20/26	☐	P00405855

Firm's name HOGANTAYLOR LLP — Firm's EIN 73-1413977

Firm's address 2222 SOUTH UTICA PL, SUITE 200
TULSA, OK 74114 — Phone no. 918-745-2333

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

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

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:
THE TULSA AREA UNITED WAY UNITES PEOPLE AND RESOURCES TO IMPROVE LIVES AND STRENGTHEN OUR COMMUNITIES.

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 $ 7,130,588. including grants of $ 6,130,860.) (Revenue $)
HEALTHY COMMUNITIES - WE HELP BUILD HEALTHY COMMUNITIES BY FOCUSING ON THE PHYSICAL, MENTAL, AND SOCIAL WELL-BEING OF INDIVIDUALS AND FAMILIES.

4b (Code:) (Expenses $ 6,914,509. including grants of $ 5,945,076.) (Revenue $)
YOUTH OPPORTUNITY - WE CONNECT YOUNG PEOPLE TO ESSENTIAL SUPPORT, INCLUDING EDUCATIONAL OPPORTUNITIES, MENTAL HEALTH SERVICES, AND MENTORSHIP PROGRAMS.

4c (Code:) (Expenses $ 6,050,196. including grants of $ 5,201,942.) (Revenue $)
FINANCIAL SECURITY - WE'RE HELPING MORE ADULTS ACCESS CAREER OPPORTUNITIES, SECURE QUALITY HOUSING, AND LAY THE FOUNDATION FOR GENERATIONAL WEALTH.

4d Other program services (Describe on Schedule O.)
(Expenses $ 3,588,410. including grants of $ 3,380,759.) (Revenue $)

4e Total program service expenses 23,683,703.

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*? See instructions	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 Rev. Proc. 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.* See instructions	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 the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? *If "Yes," complete Schedule L, Part IV*	28a		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 line 28a or 28b? *If "Yes," complete Schedule L, Part IV*	28c		X
29	Did the organization receive more than $25,000 in noncash 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 on 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	40		
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	1		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c X	

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** 42			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	**2b**	X	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?	**3a**		X
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation 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**	X	
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? **Note:** See the instructions for additional information the organization must report on Schedule O.	**13a**		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans **13b**			
c	Enter the amount of reserves on hand **13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	**14a**		X
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation 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 the 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
17	**Section 501(c)(21) organizations.** Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	**17**		

Part VI Governance, Management, and Disclosure. *For each "Yes" response to lines 2 through 7b below, and for a "No" response to 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	51		
	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	50		
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 on Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a	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 on Schedule O how this was done*	12c	X	
13	Did the organization have a written whistleblower policy?	13	X	
14	Did the organization have a written document retention and destruction policy?	14	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	X	
b	Other officers or key employees of the organization	15b	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		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 OK

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.

[X] 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

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

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

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

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

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ALISON ANTHONY PRESIDENT AND CEO	40.00	X		X				348,716.	0.	37,315.
(2) CARLA MEYER CHIEF RESOURCE DEVELOPMENT AND FINAN	40.00			X				193,071.	0.	16,233.
(3) BRENT SADLER CHIEF OPERATING OFFICER	40.00					X		143,630.	0.	10,210.
(4) ANNIE MITCHELL CHIEF COMMUNITY INVESTMENTS OFFICER	40.00					X		136,985.	0.	14,953.
(5) CYNTHIA QUALLS 211 OPERATIONS DIRECTOR	40.00					X		136,843.	0.	4,216.
(6) STEPHANIA GROBER BOARD CHAIR	2.00	X		X				0.	0.	0.
(7) JACKIE PRICE-JOHANNSEN CHAIR ELECT	6.00	X						0.	0.	0.
(8) BRANDON OLDHAM VICE CHAIR	1.00	X		X				0.	0.	0.
(9) LAQUISHA EPPS SECRETARY	1.00	X		X				0.	0.	0.
(10) ROBYN DEVORE TREASURER	2.00	X		X				0.	0.	0.
(11) MARK SMITH ASSISTANT TREASURER	1.00	X		X				0.	0.	0.
(12) JACOB ODOM ETHICS OFFICER	1.00	X						0.	0.	0.
(13) ABEL AGUILAR DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(14) MARIO BALANDRAN DIRECTOR	1.00	X						0.	0.	0.
(15) TOM BENNETT III DIRECTOR	1.00	X						0.	0.	0.
(16) BOW BUCKNER DIRECTOR	1.00	X						0.	0.	0.
(17) SUSAN BYNUM DIRECTOR	1.00	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) MIKEALE CAMPBELL DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(19) JOE CANNING DIRECTOR	1.00	X						0.	0.	0.
(20) JOSH CHRISTNER DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(21) LESLIE NORTON CROTEAU DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(22) EMILY DUKES DIRECTOR	1.00	X						0.	0.	0.
(23) EARL DUNHAM DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(24) HEATHER EARL DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(25) DR. JOHN FEDERLINE DIRECTOR	1.00	X						0.	0.	0.
(26) CATHY GATES DIRECTOR	3.00	X						0.	0.	0.
1b Subtotal								959,245.	0.	82,927.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								959,245.	0.	82,927.

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 5

		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*		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*	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*		X

Section B. Independent Contractors

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

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

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

SEE PART VII, SECTION A CONTINUATION SHEETS

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 (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) MELISSA GILLILAND DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(28) MARK GRAHAM DIRECTOR	1.00	X						0.	0.	0.
(29) CARA HAIR DIRECTOR	1.00	X						0.	0.	0.
(30) ELIZABETH HALL DIRECTOR	1.00	X						0.	0.	0.
(31) NETTA MOSS HAUSAM DIRECTOR	1.00	X						0.	0.	0.
(32) SUSAN HUNTSMAN DIRECTOR	2.00	X						0.	0.	0.
(33) DR. EBONY JOHNSON DIRECTOR	1.00	X						0.	0.	0.
(34) STEPHANIE JONES DIRECTOR	1.00	X						0.	0.	0.
(35) MELINDA KIRK DIRECTOR	3.00	X						0.	0.	0.
(36) CHELSEA LEVO FEARY DIRECTOR	1.00	X						0.	0.	0.
(37) MINDY MAHANEY DIRECTOR	1.00	X						0.	0.	0.
(38) STEVE MCINTOSH DIRECTOR-AT-LARGE	1.00	X						0.	0.	0.
(39) KARL NEUMAIER DIRECTOR	1.00	X						0.	0.	0.
(40) SHANNON O'DOHERTY DIRECTOR	1.00	X						0.	0.	0.
(41) JAMIE PAYNE DIRECTOR	1.00	X						0.	0.	0.
(42) JENNIFER PETERSON DIRECTOR	1.00	X						0.	0.	0.
(43) STEVE RAY DIRECTOR	1.00	X						0.	0.	0.
(44) KRYSTAL REYES DIRECTOR	1.00	X						0.	0.	0.
(45) GENEVIEVE SCHMOOK DIRECTOR	1.00	X						0.	0.	0.
(46) MARK STEPHEN DIRECTOR	1.00	X						0.	0.	0.
Total to Part VII, Section A, line 1c										

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 (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(47) LEIGH ANNE STRAHLER	1.00									
DIRECTOR		X						0.	0.	0.
(48) JAMEELAH STUCKEY	1.00									
DIRECTOR		X						0.	0.	0.
(49) EUNICE TARVER	1.00									
DIRECTOR		X						0.	0.	0.
(50) LYNDON TAYLOR	1.00									
DIRECTOR		X						0.	0.	0.
(51) TAMMY TAYLOR	1.00									
DIRECTOR		X						0.	0.	0.
(52) ALLISON WALDEN	1.00									
DIRECTOR		X						0.	0.	0.
(53) BRYAN WARNER	1.00									
DIRECTOR		X						0.	0.	0.
(54) CHRIS WILLIAMS	1.00									
DIRECTOR-AT-LARGE		X						0.	0.	0.
(55) LANE WILSON	1.00									
DIRECTOR		X						0.	0.	0.
Total to Part VII, Section A, line 1c										

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	1a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	255,000.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	26,658,697.				
	g Noncash contributions included in lines 1a-1f	1g	$ 139,577.				
	h **Total.** Add lines 1a-1f			26,913,697.			
Program Service Revenue		**Business Code**					
	2a						
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g **Total.** Add lines 2a-2f						
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			743,600.			743,600.
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
			(i) Real	(ii) Personal			
	6a Gross rents	6a					
	b Less: rental expenses	6b					
	c Rental income or (loss)	6c					
	d Net rental income or (loss)						
			(i) Securities	(ii) Other			
	7a Gross amount from sales of assets other than inventory	7a	8,492,913.				
	b Less: cost or other basis and sales expenses	7b	8,366,459.				
	c Gain or (loss)	7c	126,454.				
	d Net gain or (loss)			126,454.			126,454.
	8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c). See Part IV, line 18	8a					
	b Less: direct expenses	8b					
	c Net income or (loss) from fundraising events						
	9a Gross income from gaming activities. See Part IV, line 19	9a					
	b Less: direct expenses	9b					
	c Net income or (loss) from gaming activities						
	10a Gross sales of inventory, less returns and allowances	10a					
	b Less: cost of goods sold	10b					
	c Net income or (loss) from sales of inventory						
Miscellaneous Revenue		**Business Code**					
	11a MISCELLANEOUS REVENUE	900099		177,064.			177,064.
	b EVENT REGISTRATION	900099		43,135.			43,135.
	c						
	d All other revenue						
	e **Total.** Add lines 11a-11d			220,199.			
	12 **Total revenue.** See instructions			28,003,950.	0.	0.	1090253.

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	20,658,637.	20,658,637.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	595,335.	148,834.	148,834.	297,667.
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	2,962,733.	1,420,713.	606,498.	935,522.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	267,169.	100,036.	85,934.	81,199.
9 Other employee benefits	716,345.	230,064.	180,327.	305,954.
10 Payroll taxes	248,944.	100,145.	69,582.	79,217.
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting	41,877.		41,877.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	13,434.		13,434.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	657,315.	540,018.	50,401.	66,896.
12 Advertising and promotion	53,042.	10,386.		42,656.
13 Office expenses	68,799.	13,399.	30,123.	25,277.
14 Information technology	250,388.	180,840.	42,611.	26,937.
15 Royalties				
16 Occupancy	154,423.	62,712.	20,494.	71,217.
17 Travel	58,555.	22,019.	18,889.	17,647.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	196,768.	55,641.	5,566.	135,561.
20 Interest				
21 Payments to affiliates	313,251.	75,180.	103,373.	134,698.
22 Depreciation, depletion, and amortization	99,850.	34,946.	16,976.	47,928.
23 Insurance				
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 MISCELLANEOUS	143,300.	17,123.	71,641.	54,536.
b SUBSCRIPTIONS	113,229.	13,010.	67,218.	33,001.
c EQUIPMENT SERVICE CONTR	19,514.		14,801.	4,713.
d				
e All other expenses				
25 **Total functional expenses.** Add lines 1 through 24e	27,632,908.	23,683,703.	1,588,579.	2,360,626.
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	1,345,189.	1	1,199,563.
	2	Savings and temporary cash investments	8,410,929.	2	8,992,296.
	3	Pledges and grants receivable, net	16,666,814.	3	15,121,073.
	4	Accounts receivable, net	0.	4	31,352.
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	142,700.	9	213,238.
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D — 10a: 4,058,643.			
	b	Less: accumulated depreciation — 10b: 3,403,719.	752,316.	10c	654,924.
	11	Investments - publicly traded securities	2,140,789.	11	2,825,676.
	12	Investments - other securities. See Part IV, line 11	10,413,053.	12	10,815,660.
	13	Investments - program-related. See Part IV, line 11		13	
	14	Intangible assets	0.	14	252,361.
	15	Other assets. See Part IV, line 11		15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)	39,871,790.	16	40,106,143.
Liabilities	17	Accounts payable and accrued expenses	200,351.	17	304,456.
	18	Grants payable	19,391,879.	18	18,989,121.
	19	Deferred revenue		19	
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26	**Total liabilities.** Add lines 17 through 25	19,592,230.	26	19,293,577.
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here** ☒ **and complete lines 27, 28, 32, and 33.**			
	27	Net assets without donor restrictions	9,889,957.	27	10,489,574.
	28	Net assets with donor restrictions	10,389,603.	28	10,322,992.
		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	20,279,560.	32	20,812,566.
	33	Total liabilities and net assets/fund balances	39,871,790.	33	40,106,143.

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	28,003,950.
2	Total expenses (must equal Part IX, column (A), line 25)	2	27,632,908.
3	Revenue less expenses. Subtract line 2 from line 1	3	371,042.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	20,279,560.
5	Net unrealized gains (losses) on investments	5	161,964.
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	20,812,566.

Part XII Financial Statements and Reporting

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

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? 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 Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	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		

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

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

OMB No. 1545-0047

2025

Open to Public Inspection

Name of the organization
TULSA AREA UNITED WAY

Employer identification number
73-0580283

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

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

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
9 ☐ An agricultural research organization described in **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 on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations .....
g Provide the following information about the supported organization(s).

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2021	(b) 2022	(c) 2023	(d) 2024	(e) 2025	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	25738059.	25879135.	26052299.	27642889.	26913697.	132226079
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	25738059.	25879135.	26052299.	27642889.	26913697.	132226079
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)						37775411.
6 **Public support.** Subtract line 5 from line 4.						94450668.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2021	(b) 2022	(c) 2023	(d) 2024	(e) 2025	(f) Total
7 Amounts from line 4	25738059.	25879135.	26052299.	27642889.	26913697.	132226079
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	74,935.	120,950.	447,594.	765,484.	743,600.	2152563.
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.)	60,335.	88,912.	230,692.	198,774.	220,199.	798,912.
11 **Total support.** Add lines 7 through 10						135177554

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

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

Section C. Computation of Public Support Percentage

14 Public support percentage for 2025 (line 6, column (f), divided by line 11, column (f))	14	69.87 %
15 Public support percentage from 2024 Schedule A, Part II, line 14	15	71.10 %

16a **33 1/3% support test - 2025.** 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 - 2024.** 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 - 2025.** 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 - 2024.** 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) 2021	(b) 2022	(c) 2023	(d) 2024	(e) 2025	(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) 2021	(b) 2022	(c) 2023	(d) 2024	(e) 2025	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2025 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2024 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2025** (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from **2024** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2025.** 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 - 2024.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations *(continued)*

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

Section B. Type I Supporting Organizations

			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, 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 officers, 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 on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* **Part VI** *the role the organization's supported organizations played in this regard.*	**3**		

Section E. Type III Functionally Integrated Supporting Organizations

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

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

			Yes	No
2	Activities Test. **Answer lines 2a and 2b below.**			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of its supported organization(s)? *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 each of its supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	**2a**		
b	Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* **Part VI** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	**2b**		
3	Parent of Supported Organizations. **Answer lines 3a, 3b, and 3c below.**			
a	Are the organization and its supported organization(s) part of an integrated system (for example, a hospital system)? *If "Yes," provide details in* **Part VI.**	**3a**		
b	Did the organization direct 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**		
c	Did the organization have the power to regularly appoint or elect (and remove) a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No," provide details in* **Part VI.**	**3c**		

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 0.015 of line 3 (for greater amount, see instructions).	**4**		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	**5**		
6 Multiply line 5 by 0.035.	**6**		
7 Recoveries of prior-year distributions	**7**		
8 **Minimum Asset Amount** (add line 7 to line 6)	**8**		

Section C - Distributable Amount			Current Year
1 Adjusted net income for prior year (from Section A, line 8, column A)	**1**		
2 Enter 0.85 of line 1.	**2**		
3 Minimum asset amount for prior year (from Section B, line 8, column A)	**3**		
4 Enter greater of line 2 or line 3.	**4**		
5 Income tax imposed in prior year	**5**		
6 **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	**6**		

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

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

Section D - Distributions		**Current Year**
1 Amounts paid to supported organizations to accomplish exempt purposes	**1**	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	**2**	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	**3**	
4 Amounts paid to acquire exempt-use assets	**4**	
5 Qualified set-aside amounts (prior IRS approval required - *provide details in* **Part VI**)	**5**	
6 **Total annual distributions.** Add lines 1 through 5.	**6**	
7 Distributions to attentive supported organizations to which the organization is responsive (*provide details in* **Part VI**). See instructions.	**7**	
8 Distributable amount for 2025 from Section C, line 6	**8**	
9 Line 7 amount divided by line 8 amount	**9**	

Section E - Distribution Allocations (see instructions)	**(i)** **Excess Distributions**	**(ii)** **Underdistributions Pre-2025**	**(iii)** **Distributable Amount for 2025**
1 Distributable amount for 2025 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2025 (reasonable cause required - *explain in* **Part VI**). See instructions.			
3 Excess distributions carryover, if any, to 2025			
a From 2020			
b From 2021			
c From 2022			
d From 2023			
e From 2024			
f **Total** of lines 3a through 3e			
g Applied to under distributions of prior years			
h Applied to 2025 distributable amount			
i Carryover from 2020 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2025 from Section D, line 6: $			
a Applied to underdistributions of prior years			
b Applied to 2025 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2025, 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 2025. Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in* **Part VI**. See instructions.			
7 **Excess distributions carryover to 2026.** Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2021			
b Excess from 2022			
c Excess from 2023			
d Excess from 2024			
e Excess from 2025			

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, 3b, and 3c; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5 and 7; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule A — Identification of Excess Contributions Included on Part II, Line 5

2025

** Do Not File **
*** Not Open to Public Inspection ***

Contributor's Name	Total Contributions	Excess Contributions
BANK OF OKLAHOMA, ET AL.	7,679,414.	4,975,863.
J.A. AND LETA M. CHAPMAN TRUST, ET AL.	10,040,809.	7,337,258.
ONEOK, INC.	10,199,263.	7,495,712.
QUIKTRIP CORPORATION, ET AL.	14,207,624.	11,504,073.
WILLIAMS COMPANY	7,965,296.	5,261,745.
ONE GAS, INC	3,904,311.	1,200,760.

Total Excess Contributions to Schedule A, Part II, Line 5 ..... 37,775,411.

Schedule B (Form 990)
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

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

[ ] 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

[X] 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), 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 (entering "N/A" in column (b) instead of the contributor name and address), 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), 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).

Name of organization: TULSA AREA UNITED WAY

Employer identification number: 73-0580283

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	QUIKTRIP 4705 S. 129TH E AVE TULSA, OK 74103	$ 2,878,209.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
2	BANK OF OKLAHOMA ONE WILLIAMS CENTER, 16 FLOOR NE TULSA, OK 74172	$ 1,581,536.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
3	WILLIAMS ONE WILLIAMS CENTER TULSA, OK 74172	$ 1,448,009.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
4	ONEOK, INC. 100 W. 5TH STREET TULSA, OK 74103	$ 2,476,150.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
5	J.A. & LETA M. CHAPMAN TRUST 5727 S. LEWIS TULSA, OK 74105	$ 2,276,264.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
6	GEORGE KAISER FAMILY FOUNDATION 7030 S YALE AVE #600 TULSA, OK 74136	$ 640,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization: TULSA AREA UNITED WAY

Employer identification number: 73-0580283

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
7	ONE GAS, INC 15 E 15TH ST TULSA, OK 74103	$ 836,935.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
8	THE ANNE AND HENRY ZARROW FOUNDATION 401 S. BOSTON, SUITE 900 TULSA, OK 74103	$ 560,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
9	WILLIAM S. SMITH CHARITABLE TRUST 401 S. BOSTON, SUITE 2350 TULSA, OK 74103	$ 625,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

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

TULSA AREA UNITED WAY

Employer identification number

73-0580283

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)
(Rev. December 2024)
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

Open to Public Inspection

Name of the organization
TULSA AREA UNITED WAY

Employer identification number
73-0580283

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)
- ☐ Preservation of a historically important land area
- ☐ Protection of natural habitat
- ☐ Preservation of a certified historic structure
- ☐ Preservation of open space

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

			Held at the End of the Tax Year
a	Total number of conservation easements	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included on line 2a	2c	
d	Number of conservation easements included on line 2c acquired after July 25, 2006, 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 2d 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 in Part XIII ☐

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	2,556,268.	1,963,547.	1,718,556.	2,137,741.	1,959,755.
b Contributions	100,000.	361,000.			
c Net investment earnings, gains, and losses	265,002.	241,323.	254,689.	-325,755.	262,678.
d Grants or scholarships					
e Other expenditures for facilities and programs				83,000.	74,000.
f Administrative expenses	13,434.	9,602.	9,698.	10,430.	10,692.
g End of year balance	2,907,836.	2,556,268.	1,963,547.	1,718,556.	2,137,741.

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 100 %
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)	X	
(ii) Related organizations?	3a(ii)		X
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		146,587.		146,587.
b Buildings		3,491,769.	3,011,115.	480,654.
c Leasehold improvements				
d Equipment		394,815.	367,760.	27,055.
e Other		25,472.	24,844.	628.
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, line 10c, column (B))*				654,924.

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) CERTIFICATES OF DEPOSIT	10,733,500.	END-OF-YEAR MARKET VALUE
(B) CASH MANAGEMENT FUND	82,160.	END-OF-YEAR MARKET VALUE
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, line 12, col. (B))	10,815,660.	

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, line 13, col. (B))		

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, line 15, col. (B))*	

Part X Other Liabilities

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

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

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 ☐

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	27,526,786.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a	161,964.		
b	Donated services and use of facilities	2b	107,639.		
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines 2a through 2d			2e	269,603.
3	Subtract line 2e from line 1			3	27,257,183.
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	13,434.		
b	Other (Describe in Part XIII.)	4b	733,333.		
c	Add lines 4a and 4b			4c	746,767.
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	28,003,950.

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	26,993,780.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a	107,639.		
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines 2a through 2d			2e	107,639.
3	Subtract line 2e from line 1			3	26,886,141.
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	13,434.		
b	Other (Describe in Part XIII.)	4b	733,333.		
c	Add lines 4a and 4b			4c	746,767.
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	27,632,908.

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 V, LINE 4:

ENDOWMENT FUNDS ARE AVAILABLE FOR UNRESTRICTED USE BASED ON OUR ENDOWMENT SPENDING POLICY. THE PERMANENTLY RESTRICTED ENDOWMENT DOES NOT ALLOW SPENDING FROM THE ORIGINAL PRINCIPAL AMOUNT, $1,000,000. ALSO, BEGINNING IN 2024, THE UNITE FOREVER ENDOWMENT FUND WILL ENHANCE THE ORGANIZATION'S CAPACITY TO RESPOND TO CURRENT NEEDS AND TO INITIATE FORWARD LEANING COMMUNITY INVESTMENTS. ON A CURRENT BASIS, FUNDING AVAILABLE WILL HELP THE ORGANIZATION FACE CHALLENGING ECONOMIC TIMES, WHEN HUMAN SERVICES NEEDS ARE OFTEN HEIGHTENED. ON A LONG TERM BASIS, THESE INVESTMENTS WILL ENHANCE THE ORGANIZATION'S COMMUNITY BUILDING CAPACITY.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

DESIGNATIONS TO OTHER CHARITIES 733,333.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

DESIGNATIONS TO OTHER CHARITIES 733,333.

Part XIII Supplemental Information *(continued)*

SCHEDULE I (Form 990)
(Rev. December 2024)
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 instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization
TULSA AREA UNITED WAY

Employer identification number
73-0580283

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 noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
A NEW LEAF 2306 S. 1ST PLACE TULSA, OK 74012	73-1042760	501C3	586,236.	0.			HEALTHY COMMUNITY, FINANCIAL SECURITY
ABILITY RESOURCES 823 S. DETROIT, STE 110 TULSA, OK 74120	73-1000572	501C3	171,345.	0.			HEALTHY COMMUNITY
AMERICAN RED CROSS TULSA AREA CHAPTER - 10151 E 11TH STREET - TULSA, OK 74128	73-0579223	501C3	451,250.	0.			COMMUNITY RESILIENCY
BIG BROTHERS BIG SISTERS OF OKLAHOMA - 1306 S. DENVER AVE - TULSA, OK 74119	73-1226237	501C3	277,790.	0.			YOUTH OPPORTUNITIES
BOY SCOUTS OF AMERICA (INDIAN NATIONS COUNCIL) - 4295 S. GARNETT ROAD - TULSA, OK 74146	73-0579230	501C3	439,501.	0.			YOUTH OPPORTUNITIES
THE BRIDGES FOUNDATION 1345 N. LEWIS AVE TULSA, OK 74110	73-0740763	501C3	228,223.	0.			FINANCIAL SECURITY

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ..... 76.

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

For Paperwork Reduction Act Notice, see the Instructions for Form 990. **Schedule I (Form 990) (Rev. 12-2024)**

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

LHA 532101 04-01-25

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BRISTOW SOCIAL SERVICES 1705 S. CHESTNUT BRISTOW, OK 74010	73-1345471	501C3	133,313.	0.			FINANCIAL SECURITY
BROKEN ARROW NEIGHBORS 315 W. COLLEGE BROKEN ARROW, OK 74012	73-1195548	501C3	80,192.	0.			FINANCIAL SECURITY
BROKEN ARROW SENIORS, INC. 1800 S. MAIN ST BROKEN ARROW, OK 74012	73-1325797	501C3	51,843.	0.			HEALTHY COMMUNITY
CAMP FIRE USA GREEN COUNTRY COUNCIL, INC. - 706 S. BOSTON AVE - TULSA, OK 74119	73-0579231	501C3	322,894.	0.			YOUTH OPPORTUNITIES
CARING COMMUNITY FRIENDS, INC. OF SAPULPA - PO BOX 1524 - SAPULPA, OK 74067	73-1429214	501C3	80,000.	0.			FINANCIAL SECURITY
CENTER FOR EMPLOYMENT OPPORTUNITIES - 321 S BOSTON AVE, SUITE 300 - TULSA, OK 74103	13-3843322	501C3	150,000.	0.			FINANCIAL SECURITY
CHILD ADVOCACY NETWORK 2829 S. SHERIDAN ROAD TULSA, OK 74129	73-1325326	501C3	280,125.	0.			YOUTH OPPORTUNITIES
CITY YEAR 15 E 5TH ST TULSA, OK 74103	22-2882549	501C3	100,000.	0.			YOUTH OPPORTUNITIES
COMMUNITY ACTION PROJECT OF TULSA COUNTY - 5330 E. 31ST STREET, SUITE 300 - TULSA, OK 74135	73-1019247	501C3	687,531.	0.			FINANCIAL SECURITY, YOUTH OPPORTUNITIES

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CREEK COUNTY LITERACY PROGRAM 15 N. POPLAR SAPULPA, OK 74066	73-1376512	501C3	34,655.	0.			COMMUNITY RESILIENCY, YOUTH OPPORTUNITIES
CROSSTOWN LEARNING CENTER 2501 E ARCHER STREET TULSA, OK 74110	73-0782748	501C3	175,000.	0.			YOUTH OPPORTUNITIES
DOMESTIC VIOLENCE INTERVENTION SERVICES - 3124 E. APACHE ST. - TULSA, OK 74110	73-1028332	501C3	996,925.	0.			HEALTHY COMMUNITY, CAPACITY BUILDING
FAMILY & CHILDREN'S SERVICES 650 S. PEORIA AVE TULSA, OK 74120	73-0580270	501C3	1,156,968.	0.			HEALTHY COMMUNITY, YOUTH OPPORTUNITIES
GIRL SCOUTS OF EASTERN OKLAHOMA 4810 S. 129TH E AVE. TULSA, OK 74134	73-0579240	501C3	351,135.	0.			YOUTH OPPORTUNITIES
GLOBAL GARDENS PO BOX 52034 TULSA, OK 74152	20-5717276	501C3	78,120.	0.			YOUTH OPPORTUNITIES
GOODWILL INDUSTRIES OF TULSA 2800 SOUTHWEST BLVD TULSA, OK 74107	73-0614297	501C3	651,351.	0.			FINANCIAL SECURITY
GRAND MENTAL HEALTH 6333 E SKELLY DRIVE TULSA, OK 74135	73-1039733	501C3	200,000.	0.			HEALTHY COMMUNITY
HOSPICE OF GREEN COUNTRY 1120 S BOSTON AVE, #200 TULSA, OK 74119	73-1261742	501C3	123,178.	0.			HEALTHY COMMUNITY

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
KIPP ACADEMY 1661 E. VIRGIN STREET TULSA, OK 74106	11-3740269	501C3	368,875.	0.			YOUTH OPPORTUNITIES
LEGAL AID SERVICES OF OKLAHOMA 907 S. DETROIT, SUITE 725 TULSA, OK 74120	73-1022203	501C3	442,481.	0.			FINANCIAL SECURITY
LIFE SENIOR SEVICES 5950 E. 31ST STREET TULSA, OK 74135	73-1043783	501C3	823,256.	0.			COMMUNITY RESILIENCY, FINANCIAL SECURITY, HEALTHY COMMUNITY
MENTAL HEALTH ASSOCIATION OKLAHOMA 5330 E 31ST STREET, SUITE 1000 TULSA, OK 74135	73-0657931	501C3	551,917.	0.			COMMUNITY RESILIENCY, FINANCIAL SECURITY, HEALTHY COMMUNITY
MORTON COMPREHENSIVE HEALTH SERVICES - 1334 NORTH LANSING AVE - TULSA, OK 74106	73-1177858	501C3	375,000.	0.			HEALTHY COMMUNITY, FINANCIAL SECURITY
MADISON STRATEGIES GROUP 907 S. DETROIT, SUITE 210 TULSA, OK 74120	27-2323749	501C3	150,000.	0.			FINANCIAL SECURITY
OKMULGEE COUNTY FAMILY RESOURCE CENTER - 1501 S. CREEK AVE - OKMULGEE, OK 74447	73-1332643	501C3	129,634.	0.			HEALTHY COMMUNITY, YOUTH OPPORTUNITIES
OKMULGEE OKFUSKEE COUNTY YOUTH SERVICES - 1950 N. OKMULGEE - OKMULGEE, OK 74447	73-1486908	501C3	127,197.	0.			HEALTHY COMMUNITY, YOUTH OPPORTUNITIES
OPERATION AWARE OKLAHOMA 7226 E. 41ST ST TULSA, OK 74145	73-1112912	501C3	142,778.	0.			HEALTHY COMMUNITY

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
OWASSO COMMUNITY RESOURCES 109 N. BIRCH, SUITE 109 OWASSO, OK 74055	73-1445318	501C3	65,660.	0.			FINANCIAL SECURITY
PALMER CONTINUUM OF CARE, INC. 5319 S. LEWIS AVENUE, SUITE 219 TULSA, OK 74105	56-2302027	501C3	445,274.	0.			HEALTHY COMMUNITY
THE PARENT CHILD CENTER OF TULSA 1421 S. BOSTON AVENUE TULSA, OK 74119	73-1113167	501C3	618,249.	0.			YOUTH OPPORTUNITIES, SAFE BABIES COURT
READING PARTNERS 110 WEST 7TH STREET TULSA, OK 74119	77-0568469	501C3	150,000.	0.			YOUTH OPPORTUNITIES
THE SALVATION ARMY 1616 S. MAIN TULSA, OK 74119	73-0579266	501C3	1,300,515.	0.			FINANCIAL SECURITY, YOUTH OPPORTUNITIES
SAND SPRINGS COMMUNITY SERVICES 15 E 2ND STREET SAND SPRINGS, OK 74063	73-0582550	501C3	72,079.	0.			FINANCIAL SECURITY
SHOW, INC 425 W WELLS ST. SAPULPA, OK 74066	73-1028650	501C3	116,732.	0.			HEALTHY COMMUNITY, FINANCIAL SECURITY
STREET SCHOOL 1135 S. YALE AVE. TULSA, OK 74112	73-0942963	501C3	465,007.	0.			YOUTH OPPORTUNITIES
THE ARC OF OKLAHOMA 2516 E 71ST STE , ST A TULSA, OK 74136	73-1749376	501C3	186,974.	0.			COMMUNITY RESILIENCY, HEALTHY COMMUNITY

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE CENTER FOR INDIVIDUALS WITH PHYSICAL CHALLENGES - 815 S. UTICA AVE - TULSA, OK 74104	73-6070545	501C3	498,942.	0.			HEALTHY COMMUNITY
TRISTESSE GRIEF CENTER 2502 E 71ST STREET TULSA, OK 74136	73-1619790	501C3	97,500.	0.			HEALTHY COMMUNITY
TULSA BOYS HOME PO BOX 1101 TULSA, OK 74101	73-0579242	501C3	300,000.	0.			HEALTHY COMMUNITY
TULSA CARES 3712 E 11TH STREET TULSA, OK 74112	73-1388569	501C3	533,763.	0.			HEALTHY COMMUNITY, FINANCIAL SECURITY
TULSA CASA, INC. 700 S. BOSTON AVE, #230 TULSA, OK 74119	73-1312870	501C3	152,609.	0.			YOUTH OPPORTUNITIES
TULSA DAY CENTER 415 W. ARCHER TULSA, OK 74103	73-1557819	501C3	255,000.	0.			FINANCIAL SECURITY
WAGONER AREA NEIGHBORS PO BOX 933 WAGONER, OK 74477	73-1351405	501C3	80,000.	0.			FINANCIAL SECURITY
YMCA OF GREATER TULSA 2405 E SKELLY DRIVE TULSA, OK 74105	73-0579269	501C3	757,886.	0.			HEALTHY COMMUNITY, YOUTH OPPORTUNITIES
YOUTH AT HEART 6026 S. SHERIDAN ROAD TULSA, OK 74145	73-1043630	501C3	300,000.	0.			YOUTH OPPORTUNITIES

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
YOUTH SERVICES OF CREEK COUNTY 1025 E GRAYSON AVE SAPULPA, OK 74066	73-1301335	501C3	211,000.	0.			HEALTHY COMMUNITY, YOUTH OPPORTUNITIES
YOUTH SERVICES OF TULSA 311 S MADISON AVE TULSA, OK 74120	73-0785251	501C3	890,461.	0.			YOUTH OPPORTUNITIES, FINANCIAL SECURITY, HEALTHY COMMUNITY
YWCA TULSA 1910 S LEWIS AVE, SUITE 200 TULSA, OK 74104	73-0579296	501C3	500,000.	0.			COMMUNITY RESILIENCY, HEALTHY COMMUNITY
LEADERSHIP TULSA - NEW VOICES 1151 S ELGIN AVE TULSA, OK 74120	73-1042332	501C3	17,000.	0.			INTIATIVE TO INCREASE DIVERISTY ON TULSA AREA UNITED WAY AGENCY BOARDS
AMPLIFY 1601 S. MAIN ST, #200 TULSA, OK 74119	47-1170599	501C3	120,000.	0.			COMMUNITY COLLABORATIVE IN SUPPORT OF EXPANDING SEX EDUCATION, PROMOTING HEALTHY RELATIONSHIPS,
HUNGER FREE OKLAHOMA 907 S. DETROIT AVE #600 TULSA, OK 74120	73-1554474	501C3	113,000.	0.			COLLABORATION GRANT IN SUPPORT OF FOOD SECURITY.
IMPACTTULSA 907 S DETROIT AVE, SUITE 1100B TULSA, OK 74120	73-1554474	501C3	200,000.	0.			COMMUNITY COLLABORATIVE IN SUPPORT OF EDUCATION
MEALS ON WHEELS 12620 E 31ST STREET TULSA, OK 74146	73-1125389	501C3	50,000.	0.			HEALTHY COMMUNITY
TULSA REGIONAL STEM ALLIANCE 5005 S DARLINGTON AVE TULSA, OK 74120	81-4051559	501C3	76,000.	0.			COMMUNITY COLLABORATIVE IN SUPPORT OF EDUCATION

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
OKMULGEE COUNTY HOMELESS SHELTER 214 N. MORTON AVE OKMULGEE, OK 74441	73-1485176	501C3	43,000.	0.			BRIDGE FUNDING IN SUPPORT OF FINANCIAL SECURITY
GREEN COUNTRY HABITAT FOR HUMANITY 6235 E 13TH ST TULSA, OK 74112	73-1325063	501C3	15,000.	0.			FINANCIAL SECURITY
TULSA REGIONAL CHAMBER 1 W 3RD ST TULSA, OK 74103	73-0488250	501C6	8,000.	0.			INTERCITY VISIT AND INTERN PROGRAM
DOWNTOWN TULSA PARTNERSHIP 401 S. BOSTON AVE, SUITE 500 TULSA, OK 74103	86-2858962	501C3	100,000.	0.			DOWNTOWN PUBLIC SAFETY
BEHEARD, INC. 333 W. 4TH ST., FL 1 TULSA, OK 74103	85-3528011	501C3	55,000.	0.			INNOVATION GRANT IN SUPPORT OF A VENDING MACHINE AND AFTER-HOURS SUPPORT FOR UNHOUSED
CARABELLE'S LEGACY, INC. 748 N. COLUMBIA AVE TULSA, OK 74110	85-3807900	501C3	50,000.	0.			INNOVATION GRANT IN SUPPORT OF SKILLS TRAINING, STIPENDS AND SUPPORT FOR
MET CARES FOUNDATION 1717 N. PEORIA AVE., SUITE 2 TULSA, OK 74106	47-4013678	501C3	40,000.	0.			INNOVATION GRANT IN SUPPORT OF PARENT-LED WALKING SCHOOL BUS PROGRAMS ADDRESSING
MODUS, INC. 1519 S. HARVARD AVE TULSA, OK 74112	83-2356858	501C3	40,000.	0.			INNOVATION GRANT IN SUPPORT OF A SHUTTLE LINKING GRADUATES TO LIVING-WAGE JOBS WHERE
TULSA CORNERSTONE ASSISTANCE NETWORK - 3216 W. 53RD ST N. - TULSA, OK 74126	73-1526353	501C3	40,000.	0.			INNOVATION GRANT IN SUPPORT OF HEALTH, FOOD AND NUTRITION ACTIVITIES FOR STUDENTS AND THEIR

Part II **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FOUNDATION FOR TULSA SCHOOLS 3027 S NEW HAVEN AVE TULSA, OK 74114	73-1612027	501C3	160,000.	0.			STRONG TOMORROWS
SMILES OF FAITH 1301 S. BOSTON AVE TULSA, OK 74119	83-4676066	501C3	100,000.	0.			HEALTHY COMMUNITY
CENTER FOR HOUSING SOLUTIONS 110 S HARTFORD AVE TULSA, OK 74120	84-4733422	501C3	196,000.	0.			HOMELESSNESS COLLABORATION
THE OPPORTUNITY PROJECT - A FUND AT TULSA COMMUNITY FOUNDATION - 5310 E 31ST ST. STE 300 - TULSA, OK 74135	73-1554474	501C3	25,000.	0.			COLLABORATION GRANT IN SUPPORT OF COORDINATING AND EXPANDING ACCESS TO OUT-OF-SCHOOL TIME
TULSA HIGHER EDUCATION CONSORTIUM - A FUND AT TULSA COMMUNITY FOUNDATION - 5310 E 31ST ST. STE 300 - TULSA, OK 74135	73-1554474	501C3	25,000.	0.			COLLABORATION GRANT IN SUPPORT OF IMPROVING DEGREE COMPLETION AND COORDINATION FOR HIGHER
CATHOLIC CHARITIES 2450 N HARVARD AVE TULSA, OK 74115	73-1171950	501C3	149,273.	0.			HEALTHY COMMUNITY, COMMUNITY RESILIENCY
HEALTHY MINDS - A FUND AT TULSA COMMUNITY FOUNDATION - 5310 E 31ST ST. STE 300 - TULSA, OK 74135	73-1554474	501C3	120,000.	0.			COMMUNITY COLLABORATION GRANT IN SUPPORT OF MENTAL HEALTH ACROSS ALL AGES

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

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:
TULSA AREA UNITED WAY USES A DETAILED PROCESS FOR EVALUATING ITS PARTNER AGENCIES AND THE USE OF ALLOCATED FUNDS. THE TULSA AREA UNITED WAY COMMUNITY INVESTMENTS DEPARTMENT, IN CONJUNCTION WITH OVER 170 COMMUNITY PANEL VOLUNTEERS, STUDY THE APPLICATIONS OF PARTNER AGENCIES WITH PARTICULAR ATTENTION PAID TO GOVERNANCE AND MANAGEMENT STANDARDS, THE FISCAL STABILITY OF THE AGENCY, ACCURACY OF REPORTING THE USE OF ALLOCATED FUNDS AND THE RESULTS ACHIEVED FOR AGENCY CLIENTS. THE PANEL VOLUNTEERS CONDUCT A SITE VISIT WITH EACH AGENCY EACH YEAR, GATHERING MORE DETAILED INFORMATION AS NEEDED. PANEL VOLUNTEERS CONDUCT A FINAL MEETING AT WHICH THEY DETERMINE THE RECOMMENDED ALLOCATION. FOLLOWING THESE MEETINGS, THE PANEL CHAIR AND CO-CHAIRS MEET WITH A DIVISION LEADER TO EXPLAIN THE PANEL RECOMMENDATIONS. THE TOTAL RECOMMENDED FUNDING IS PRESENTED TO THE COMMUNITY INVESTMENTS CABINET, AND THEN TO THE TULSA AREA UNITED WAY BOARD OF DIRECTORS FOR ACCEPTANCE AND APPROVAL. AGENCIES PROVIDE A DETAILED REPORT ON HOW FUNDS WERE SPENT AT THE END OF EACH CALENDAR YEAR AS A CRITICAL PART OF THEIR APPLICATION FOR FUTURE FUNDING.

Part IV Supplemental Information

PART II, LINE 1, COLUMN (H):
NAME OF ORGANIZATION OR GOVERNMENT: AMPLIFY
(H) PURPOSE OF GRANT OR ASSISTANCE: COMMUNITY COLLABORATIVE IN SUPPORT OF EXPANDING SEX EDUCATION, PROMOTING HEALTHY RELATIONSHIPS, AND ENGAGING IN PUBLIC CONVERSATION.

NAME OF ORGANIZATION OR GOVERNMENT: BEHEARD, INC.
(H) PURPOSE OF GRANT OR ASSISTANCE: INNOVATION GRANT IN SUPPORT OF A VENDING MACHINE AND AFTER-HOURS SUPPORT FOR UNHOUSED INDIVIDUALS.

NAME OF ORGANIZATION OR GOVERNMENT: CARABELLE'S LEGACY, INC.
(H) PURPOSE OF GRANT OR ASSISTANCE: INNOVATION GRANT IN SUPPORT OF SKILLS TRAINING, STIPENDS AND SUPPORT FOR JUSTICE-IMPACTED WOMEN AND FIRE-AFFECTED FAMILIES.

NAME OF ORGANIZATION OR GOVERNMENT: MET CARES FOUNDATION
(H) PURPOSE OF GRANT OR ASSISTANCE: INNOVATION GRANT IN SUPPORT OF PARENT-LED WALKING SCHOOL BUS PROGRAMS ADDRESSING CHRONIC ABSENTEEISM.

NAME OF ORGANIZATION OR GOVERNMENT: MODUS, INC.
(H) PURPOSE OF GRANT OR ASSISTANCE: INNOVATION GRANT IN SUPPORT OF A SHUTTLE LINKING GRADUATES TO LIVING-WAGE JOBS WHERE PUBLIC TRANSPORTATION IS NOT AVAILABLE.

NAME OF ORGANIZATION OR GOVERNMENT: TULSA CORNERSTONE ASSISTANCE NETWORK
(H) PURPOSE OF GRANT OR ASSISTANCE: INNOVATION GRANT IN SUPPORT OF HEALTH, FOOD AND NUTRITION ACTIVITIES FOR STUDENTS AND THEIR NEIGHBORHOODS

NAME OF ORGANIZATION OR GOVERNMENT:
THE OPPORTUNITY PROJECT - A FUND AT TULSA COMMUNITY FOUNDATION
(H) PURPOSE OF GRANT OR ASSISTANCE: COLLABORATION GRANT IN SUPPORT OF COORDINATING AND EXPANDING ACCESS TO OUT-OF-SCHOOL TIME PROGRAMMING.

NAME OF ORGANIZATION OR GOVERNMENT:
TULSA HIGHER EDUCATION CONSORTIUM - A FUND AT TULSA COMMUNITY FOUNDATION
(H) PURPOSE OF GRANT OR ASSISTANCE: COLLABORATION GRANT IN SUPPORT OF IMPROVING DEGREE COMPLETION AND COORDINATION FOR HIGHER EDUCATION.

SCHEDULE J (Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

Compensation Information

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

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

Part I Questions Regarding Compensation

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

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) ALISON ANTHONY	(i)	276,619.	72,097.	0.	34,536.	2,779.	386,031.	0.
PRESIDENT AND CEO	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) CARLA MEYER	(i)	163,256.	29,815.	0.	12,065.	4,168.	209,304.	0.
CHIEF RESOURCE DEVELOPMENT AND FINAN	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) BRENT SADLER	(i)	123,670.	19,960.	0.	6,042.	4,168.	153,840.	0.
CHIEF OPERATING OFFICER	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) ANNIE MITCHELL	(i)	113,585.	23,400.	0.	8,750.	6,203.	151,938.	0.
CHIEF COMMUNITY INVESTMENTS OFFICER	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
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Part III Supplemental Information

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

PART I, LINE 1A:
THE ORGANIZATION PAYS FOR A MEMBERSHIP TO THE SUMMIT CLUB FOR ALISON ANTHONY.

PART I, LINE 3:
COMPENSATION IS APPROVED ANNUALLY BY THE BOARD COMPENSATION COMMITTEE WHICH IS MADE UP OF CURRENT AND FORMER DIRECTORS OF THE ORGANIZATION. THE COMMITTEE DIRECTLY SETS/APPROVES THE PRESIDENT AND CEO'S SALARY AND INDIRECTLY APPROVES ALL OTHER STAFF POSITION SALARIES BASED ON THE RECOMMENDATION OF THE PRESIDENT AND CEO. FOLLOWING THAT COMMITTEE MEETING, AMOUNTS ARE APPROVED BY THE FINANCE AND AUDIT COMMITTEE AND THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS.

PART I, LINE 7:
VARIABLE COMPENSATION WAS AWARDED TO EMPLOYEES OF THE ORGANIZATION BASED UPON EACH INDIVIDUAL'S PERFORMANCE DURING THE YEAR. EACH YEAR, THE PRESIDENT AND CEO REQUESTS A BUDGET FOR VARIABLE COMPENSATION FROM THE COMPENSATION COMMITTEE. INDIVIDUAL AMOUNTS ARE DISCRETIONARY AND JOINTLY AGREED UPON BY EMPLOYEES' SUPERVISORS AND THE PRESIDENT AND CEO.

SCHEDULE M (Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2025

Open to Public Inspection

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

Part I Types of Property

		(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1	Art - Works of art				
2	Art - Historical treasures				
3	Art - Fractional interests				
4	Books and publications				
5	Clothing and household goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities - Publicly traded	X	1,562	138,807.	VALUE ON DONATION DA
10	Securities - Closely held stock				
11	Securities - Partnership, LLC, or trust interests				
12	Securities - Miscellaneous				
13	Qualified conservation contribution - Historic structures				
14	Qualified conservation contribution - Other				
15	Real estate - Residential				
16	Real estate - Commercial				
17	Real estate - Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
24	Archeological artifacts				
25	Other (AUCTION ITEMS)	X	4	450.	VALUE PROVIDED BY DO
26	Other (MAZZIOS - DONAT)	X	1	320.	VALUE PROVIDED BY DO
27	Other ( )				
28	Other ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgment 29

			Yes	No
30a	During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?	30a		X
b	If "Yes," describe the arrangement in Part II.			
31	Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	31		X
32a	Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	32a		X
b	If "Yes," describe in Part II.			
33	If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.			

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also, complete this part for any additional information.

SCHEDULE O (Form 990)
(Rev. December 2024)
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 Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization
TULSA AREA UNITED WAY

Employer identification number
73-0580283

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
COMMUNITIES.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:
COMMUNITY RESILIENCY, DATA AND RESEARCH, 211, NTECH, INNOVATION GRANTS, COLLABORATIVE FUNDING, CAPACITY BUILDING, OTHER SPECIAL FUNDING.
EXPENSES $ 3,588,410. INCLUDING GRANTS OF $ 3,380,759. REVENUE $ 0.

FORM 990, PART VI, SECTION A, LINE 2:
THERE ARE NUMEROUS BUSINESS RELATIONSHIPS WITHIN THE BOARD. OUR BOARD CONTAINS THE HEADS OF MAJOR EMPLOYERS SUCH AS BANKS, LOCAL UTILITY COMPANIES, AND HEALTH INSURANCE PROVIDERS. BOARD MEMBERS ARE REQUIRED TO ANNUALLY DISCLOSE ANY INTEREST THAT COULD GIVE RISE TO CONFLICTS. CIRCUMSTANCES WHICH CREATE POSSIBLE CONFLICTS ARE REVIEWED BY THE FINANCE AND AUDIT COMMITTEE. SHOULD THE COMMITTEE DETERMINE THAT A POTENTIAL CONFLICT OF INTEREST IS PRESENT, THAT INFORMATION WILL BE TAKEN TO THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS. THE EXECUTIVE COMMITTEE WILL ADDRESS CONCERNS REGARDING POTENTIAL CONFLICTS OF INTEREST AND TAKE APPROPRIATE ACTION TO RESOLVE ANY CONFLICT.

FORM 990, PART VI, SECTION A, LINE 6:
ALL OF THE BOARD OF DIRECTORS ARE CONSIDERED MEMBERS OF THE ORGANIZATION.

FORM 990, PART VI, SECTION A, LINE 7A:
THE DIRECTORS ARE ELECTED BY THE MEMBER/DIRECTORS.

FORM 990, PART VI, SECTION B, LINE 11B:
A DRAFT AND FINAL VERSION ARE REVIEWED AND APPROVED BY THE FINANCE AND AUDIT COMMITTEE. THE FINAL VERSION IS PROVIDED TO THE FULL BOARD AT THE FOLLOWING MEETING.

FORM 990, PART VI, SECTION B, LINE 12C:
BOARD MEMBERS ARE REQUIRED TO ANNUALLY DISCLOSE ANY INTEREST THAT COULD GIVE RISE TO CONFLICTS. CIRCUMSTANCES WHICH CREATE POSSIBLE CONFLICTS ARE REVIEWED BY THE FINANCE AND AUDIT COMMITTEE. SHOULD THE COMMITTEE DETERMINE THAT A POTENTIAL CONFLICT OF INTEREST IS PRESENT, THAT INFORMATION WILL BE TAKEN TO THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS. THE EXECUTIVE COMMITTEE WILL ADDRESS CONCERNS REGARDING POTENTIAL CONFLICTS OF INTEREST AND TAKE APPROPRIATE ACTION TO RESOLVE ANY CONFLICT.

FORM 990, PART VI, SECTION B, LINE 15:
OUR COMPENSATION COMMITTEE MEETS TWICE PER YEAR TO DISCUSS, REVIEW, AND APPROVE COMPENSATION FOR THE UPCOMING YEAR FOR THE CEO. THEY ALSO REVIEW AND APPROVE THE PAY SCALE FOR ALL OTHER EMPLOYEES, WHICH WAS DEVELOPED USING COMPARABILITY DATA OF SURROUNDING NON-PROFITS AND BUSINESSES AS WELL AS LIKE SIZED UNITED WAYS. THE COMMITTEE DECISIONS ARE ULTIMATELY APPROVED BY THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION C, LINE 19:
FINANCIAL STATEMENTS ARE IN OUR ANNUAL REPORT AND ON OUR WEBSITE. OUR GOVERNING DOCUMENTS AND CONFLICTS OF INTEREST POLICY ARE AVAILABLE UPON REQUEST.

TAX RETURN FILING INSTRUCTIONS

OKLAHOMA FORM 512E

FOR THE YEAR ENDING

December 31, 2025

Prepared For:

Ms. Alison Anthony
Tulsa Area United Way
1430 South Boulder
Tulsa, OK 74119

Prepared By:

HoganTaylor, LLP
2222 S. Utica Place, Suite 200
Tulsa, OK 74114-7002

To be Signed and Dated By:

The authorized individual(s).

Amount of Tax:

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

Oklahoma Tax Commission
P.O. Box 26800
Oklahoma City, OK 73126-0800

Return Must be Mailed On or Before:

December 15, 2026

Special Instructions:

Oklahoma Return of Organization Exempt from Income Tax

Form 512-E 2025

Section 501(c) of the Internal Revenue Code (IRC)

PART 1

For the year January 1 - December 31, 2025, or other taxable year beginning: _____ 2025 **ending:** _____ , _____

Type of Tax Year (If not calendar year): ☐ **Fiscal Year** ☐ **Short Year** ☐ **52/53 Week Year**

Name of Organization	Federal Employer Identification Number	Date Qualified for Tax Exempt Status
TULSA AREA UNITED WAY	730580283	12311924

Address (Number and Street)	City	State or Province	ZIP or Foreign Postal Code
1430 SOUTH BOULDER	TULSA	OK	74119

County in Which Located	Foreign Country (if not U.S.)

Place an 'X' if: **(1)** ☐ Initial Return **(2)** ☐ Final Return **(3)** ☐ Amended Return (See Schedule 512-E-X on page 2)

ROUND TO NEAREST WHOLE DOLLAR.

PART 2: STATEMENT OF UNRELATED BUSINESS TAXABLE INCOME (See instructions on pages 3-4.)		**Total Federal**	**Allocable Oklahoma**
A	Total unrelated trade or business income - applicable Federal Form(s) 990		
B	Total unrelated trade or business deductions - applicable Federal Form(s) 990		
C	Unrelated business taxable income - enter here and on line 1 below		
INCOME SUBJECT TO TAX			
1	Unrelated business taxable income from statement above allocable to Oklahoma		
2	Other net income - **provide** schedule		
3	Oklahoma Capital Gain deduction (**provide** Form 561-C)		
4	Oklahoma taxable income (total of lines 1, 2, and 3)		
TAX COMPUTATION			
5	Tax at 4% of line 4. If trust, see rate schedule on page 3 and place an '1' in the box. If recapturing the Oklahoma Affordable Housing Tax Credit, add the recaptured credit here and enter a '2' in the box. If making an Okla. installment payment pursuant to IRC Sec. 965(h) and 68 OS Sec. 2368(K), add the installment payment here and enter a "3" in the box ☐		
6	**Less:** Other Tax Credits **(provide** Form 511-CR). Enter the line number of the credit in the box: ☐		
7	Balance of tax due (line 5 minus line 6, but not less than zero)		
8	2025 Oklahoma estimated tax payments, extension payments, and prior year carryforward		
9	Oklahoma withholding (**provide** Form 1099, Form 500-A, Form 500-B or other withholding statement)		
10	Amount paid with original return and amount paid after it was filed (amended return only)		
11	Any refunds or overpayment applied (amended return only)		( )
12	Total of lines 8 through 11		
13	Overpayment (if line 12 is larger than line 7 enter amount overpaid)		
14	Amount of line 13 to be credited to 2026 estimated tax (original return only)		

Oklahoma Return of Organization Exempt from Income Tax

FEIN: 730580283 TULSA AREA UNITED WAY

Amount from line 14 on page 1 _____

Line 15 provides you the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Place the line number of the organization from page 4 of this form in the box below and enter the amount you are donating. If giving to more than one organization, put a "99" in the box and attach a schedule showing how you would like your donation split.

15 Donations from your refund ..... ☐ $2 ☐ $5 ☐ $ _____ ☐ ..... _____

16 Add lines 14 and 15 and enter amount ..... _____

17 Amount to be refunded to you (line 13 minus line 16) ..... **Refund** _____

Direct Deposit Note:

All refunds must be by direct deposit. See Direct Deposit Information on page 5 for details.

Is this refund going to or through an account that is located outside of the United States? ☐ **Yes** ☐ **No**

Direct Deposit my refund in my:

☐ **Checking Account** **Routing Number:** _____

☐ **Savings Account** **Account Number:** _____

18 Tax Due (if line 7 is larger than line 12, enter tax due) ..... **Tax Due** _____

19 (a) For delinquent payment add penalty of 5% ..... _____

(b) For delinquent payment add interest of 1.25% per month ..... _____

20 Underpayment of estimated tax interest ..... Annualized ☐ ..... _____

21 Total tax, penalty and interest due - add lines 18-20; pay in full with return ..... **Balance Due** _____

If the Oklahoma Tax Commission (OTC) may discuss this return with your tax preparer, place an "X" here: [X] **Make check payable to the Oklahoma Tax Commission**

Under penalty of perjury, I declare I have examined this return, including any accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. If prepared by person other than the taxpayer, this declaration is based on all information of which preparer has any knowledge.

Signature of Officer or Trustee	Date	Signature of Preparer	Date
		MEGAN COURTNEY	
Printed Name		Printed Name of Preparer	Phone Number
ALISON ANTHONY		MEGAN COURTNEY	9187452333
Title	Phone Number	Preparer's PTIN	
PRESIDENT AND C	9185837171	P00405855	

SCHEDULE 512-E-X: AMENDED RETURN SCHEDULE (See instructions on page 3)

A Did you file an amended federal income tax return? ☐ Yes [X] No
Provide a copy of the amended federal return and a copy of "Statement of Adjustment", IRS refund check or deposit slip.

B If this return is being filed due to a federal audit, **provide** a complete copy of the RAR.

C Explanation or reason for amended return (**provide** all necessary schedules):

_____

_____

Do not staple documentation to this form. To attach items, use a paper clip.
Mailing Address for this form: PO Box 26800, Oklahoma City, OK 73126-0800
The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes to any state tax law.