

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](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2017**

Open to Public Inspection

**A** For the 2017 calendar year, or tax year beginning **JUL 1, 2017** and ending **JUN 30, 2018**

**B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

Doing business as

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

**2200 LAKE BOULEVARD NE**

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

**ATLANTA, GA 30319**

**F** Name and address of principal officer: **MARY WHEATLEY**  
**SAME AS C ABOVE**

**D** Employer identification number

**58-1654301**

**E** Telephone number

**404-633-3777**

**G** Gross receipts \$ **71,163,290.**

**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.RHEUMRESEARCH.ORG**

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

**L** Year of formation: **1985** **M** State of legal domicile: **IL**

## Part I Summary

|                             |                                                                           |                                                                                                                                                                                            |                                                        |                                           |
|-----------------------------|---------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------|
| Activities & Governance     | <b>1</b>                                                                  | Briefly describe the organization's mission or most significant activities: <b>SUPPORT RESEARCH &amp; TRAINING THAT ADVANCES THE PREVENTION, TREATMENT AND CURE OF RHEUMATIC DISEASES.</b> |                                                        |                                           |
|                             | <b>2</b>                                                                  | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.                                                    |                                                        |                                           |
|                             | <b>3</b>                                                                  | Number of voting members of the governing body (Part VI, line 1a)                                                                                                                          | <b>3</b>                                               | <b>18</b>                                 |
|                             | <b>4</b>                                                                  | Number of independent voting members of the governing body (Part VI, line 1b)                                                                                                              | <b>4</b>                                               | <b>18</b>                                 |
|                             | <b>5</b>                                                                  | Total number of individuals employed in calendar year 2017 (Part V, line 2a)                                                                                                               | <b>5</b>                                               | <b>0</b>                                  |
|                             | <b>6</b>                                                                  | Total number of volunteers (estimate if necessary)                                                                                                                                         | <b>6</b>                                               | <b>185</b>                                |
|                             | <b>7a</b>                                                                 | Total unrelated business revenue from Part VIII, column (C), line 12                                                                                                                       | <b>7a</b>                                              | <b>0.</b>                                 |
| <b>7b</b>                   | Net unrelated business taxable income from Form 990-T, line 34            | <b>7b</b>                                                                                                                                                                                  | <b>0.</b>                                              |                                           |
| Revenue                     | <b>8</b>                                                                  | Contributions and grants (Part VIII, line 1h)                                                                                                                                              | <b>Prior Year</b><br><b>14,568,184.</b>                | <b>Current Year</b><br><b>27,525,009.</b> |
|                             | <b>9</b>                                                                  | Program service revenue (Part VIII, line 2g)                                                                                                                                               | <b>0.</b>                                              | <b>0.</b>                                 |
|                             | <b>10</b>                                                                 | Investment income (Part VIII, column (A), lines 3, 4, and 7d)                                                                                                                              | <b>965,579.</b>                                        | <b>2,042,648.</b>                         |
|                             | <b>11</b>                                                                 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)                                                                                                                   | <b>0.</b>                                              | <b>0.</b>                                 |
|                             | <b>12</b>                                                                 | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)                                                                                                         | <b>15,533,763.</b>                                     | <b>29,567,657.</b>                        |
| Expenses                    | <b>13</b>                                                                 | Grants and similar amounts paid (Part IX, column (A), lines 1-3)                                                                                                                           | <b>9,853,432.</b>                                      | <b>9,371,044.</b>                         |
|                             | <b>14</b>                                                                 | Benefits paid to or for members (Part IX, column (A), line 4)                                                                                                                              | <b>0.</b>                                              | <b>0.</b>                                 |
|                             | <b>15</b>                                                                 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)                                                                                                          | <b>42,000.</b>                                         | <b>46,684.</b>                            |
|                             | <b>16a</b>                                                                | Professional fundraising fees (Part IX, column (A), line 11e)                                                                                                                              | <b>0.</b>                                              | <b>0.</b>                                 |
|                             | <b>b</b>                                                                  | Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>2,077,177.</b>                                                                                                              |                                                        |                                           |
| <b>17</b>                   | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)              | <b>4,138,136.</b>                                                                                                                                                                          | <b>4,105,544.</b>                                      |                                           |
| <b>18</b>                   | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | <b>14,033,568.</b>                                                                                                                                                                         | <b>13,523,272.</b>                                     |                                           |
| <b>19</b>                   | Revenue less expenses. Subtract line 18 from line 12                      | <b>1,500,195.</b>                                                                                                                                                                          | <b>16,044,385.</b>                                     |                                           |
| Net Assets or Fund Balances | <b>20</b>                                                                 | Total assets (Part X, line 16)                                                                                                                                                             | <b>Beginning of Current Year</b><br><b>54,584,865.</b> | <b>End of Year</b><br><b>71,590,041.</b>  |
|                             | <b>21</b>                                                                 | Total liabilities (Part X, line 26)                                                                                                                                                        | <b>642,615.</b>                                        | <b>759,595.</b>                           |
|                             | <b>22</b>                                                                 | Net assets or fund balances. Subtract line 21 from line 20                                                                                                                                 | <b>53,942,250.</b>                                     | <b>70,830,446.</b>                        |

## 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                  |
|                        | <b>MARY WHEATLEY, EXECUTIVE DIRECTOR</b>                  | <b>3/11/2019</b>      |
| Paid Preparer Use Only | Print/Type preparer's name                                | Preparer's signature  |
|                        | <b>AMY BIBBY</b>                                          | <b>3/7/19</b>         |
| Firm's name            | Firm's EIN                                                | PTIN                  |
|                        | <b>DIXON HUGHES GOODMAN LLP</b>                           | <b>56-0747981</b>     |
| Firm's address         | Phone no.                                                 |                       |
|                        | <b>500 RIDGEFIELD COURT</b><br><b>ASHEVILLE, NC 28806</b> | <b>(828) 254-2254</b> |

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

**Part III** Statement of Program Service Accomplishments

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

☒**1** Briefly describe the organization's mission:

**THE MISSION OF THE RHEUMATOLOGY RESEARCH FOUNDATION IS TO ADVANCE RESEARCH AND TRAINING TO IMPROVE THE HEALTH OF PEOPLE WITH RHEUMATIC DISEASES.**

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

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

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

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

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ **10,965,665.** including grants of \$ **9,371,044.** ) (Revenue \$ **0.** )

**THE FOUNDATION PROVIDES FUNDING TO HELP RECRUIT MEDICAL AND DOCTORAL STUDENTS INTO THE SUBSPECIALTY AND SUPPORTS INVESTIGATORS WORKING IN THE FIELD OF RHEUMATOLOGY. GRANTS ARE AWARDED FOR DIFFERENT TRAINING OPPORTUNITIES, FROM MEDICAL STUDENTS TO ESTABLISHED INVESTIGATORS, BUILDING A MORE CAPABLE, ROBUST TEAM OF RHEUMATOLOGY PROFESSIONALS AROUND THE NATION. IN THE LAST FIVE YEARS, RESEARCHERS RECEIVING FOUNDATION FUNDING HAVE PUBLISHED 913 PAPERS, RECEIVED \$84.4M IN RELATED NIH FUNDING AND GIVEN 693 SCIENTIFIC PRESENTATIONS ON THEIR PROJECTS WORLDWIDE.**

**PLEASE SEE SCHEDULE O FOR A CONTINUATION OF PROGRAM SERVICES.**

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

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

**4d** Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses **10,965,665.**

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

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

|                                                                                                                                                                                                                                                                                                                            | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>                                                                                                                                                                                                              |     | X  |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?                                                                                                                                                                                                      |     |    |
| <b>21</b> 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? <i>If "Yes," complete Schedule I, Parts I and II</i>                                                                                             | X   |    |
| <b>22</b> 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? <i>If "Yes," complete Schedule I, Parts I and III</i>                                                                                                                 | X   |    |
| <b>23</b> 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? <i>If "Yes," complete Schedule J</i>                                                      | X   |    |
| <b>24a</b> 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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>                           |     | X  |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?                                                                                                                                                                                                                 |     |    |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?                                                                                                                                                                        |     |    |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?                                                                                                                                                                                                           |     |    |
| <b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>                                                                                        |     | X  |
| <b>b</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? <i>If "Yes," complete Schedule L, Part I</i>                                        |     | X  |
| <b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i>                                 |     | X  |
| <b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> |     | X  |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):                                                                                                                    |     |    |
| <b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>                                                                                                                                                                                                    |     | X  |
| <b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>                                                                                                                                                                                 |     | X  |
| <b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>                                                                                     |     | X  |
| <b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>                                                                                                                                                                                                  | X   |    |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>                                                                                                                                  |     | X  |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations?<br><i>If "Yes," complete Schedule N, Part I</i>                                                                                                                                                                                     |     | X  |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>                                                                                                                                                                      |     | X  |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>                                                                                                                      |     | X  |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>                                                                                                                                                                  | X   |    |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?                                                                                                                                                                                                                         |     | X  |
| <b>b</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)? <i>If "Yes," complete Schedule R, Part V, line 2</i>                                                                                          |     |    |
| <b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>                                                                                                                           | X   |    |
| <b>37</b> 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? <i>If "Yes," complete Schedule R, Part VI</i>                                                                             |     | X  |
| <b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?                                                                                                                                                                                                   | X   |    |

**Note.** All Form 990 filers are required to complete Schedule O

**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

☒ X

|            |                                                                                                                                                                                                                                            | Yes | No |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1a</b>  | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable                                                                                                                                                               | 27  |    |
| <b>1b</b>  | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable                                                                                                                                                            | 0   |    |
| <b>c</b>   | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?                                                                                   | X   |    |
| <b>2a</b>  | 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                                                              | 0   |    |
| <b>b</b>   | If at least one is reported on line 2a, did the organization file all required federal employment tax returns?<br><b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)         |     |    |
| <b>3a</b>  | Did the organization have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                              |     | X  |
| <b>b</b>   | If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O                                                                                                                               |     |    |
| <b>4a</b>  | 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)? |     | X  |
| <b>b</b>   | If "Yes," enter the name of the foreign country:<br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).                                                                    |     |    |
| <b>5a</b>  | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?                                                                                                                                      |     | X  |
| <b>b</b>   | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?                                                                                                                           |     | X  |
| <b>c</b>   | If "Yes," to line 5a or 5b, did the organization file Form 8886-T?                                                                                                                                                                         |     |    |
| <b>6a</b>  | 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?                                    |     | X  |
| <b>b</b>   | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?                                                                                              |     |    |
| <b>7</b>   | <b>Organizations that may receive deductible contributions under section 170(c).</b>                                                                                                                                                       |     |    |
| <b>a</b>   | 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?                                                                                            |     | X  |
| <b>b</b>   | If "Yes," did the organization notify the donor of the value of the goods or services provided?                                                                                                                                            |     |    |
| <b>c</b>   | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?                                                                                                       |     | X  |
| <b>d</b>   | If "Yes," indicate the number of Forms 8282 filed during the year                                                                                                                                                                          | 7d  |    |
| <b>e</b>   | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?                                                                                                                            |     | X  |
| <b>f</b>   | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?                                                                                                                               |     | X  |
| <b>g</b>   | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?                                                                                                           |     |    |
| <b>h</b>   | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?                                                                                                         |     |    |
| <b>8</b>   | <b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?                                             |     |    |
| <b>9</b>   | <b>Sponsoring organizations maintaining donor advised funds.</b>                                                                                                                                                                           |     |    |
| <b>a</b>   | Did the sponsoring organization make any taxable distributions under section 4966?                                                                                                                                                         |     |    |
| <b>b</b>   | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?                                                                                                                                          |     |    |
| <b>10</b>  | <b>Section 501(c)(7) organizations.</b> Enter:                                                                                                                                                                                             |     |    |
| <b>a</b>   | Initiation fees and capital contributions included on Part VIII, line 12                                                                                                                                                                   | 10a |    |
| <b>b</b>   | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities                                                                                                                                                | 10b |    |
| <b>11</b>  | <b>Section 501(c)(12) organizations.</b> Enter:                                                                                                                                                                                            |     |    |
| <b>a</b>   | Gross income from members or shareholders                                                                                                                                                                                                  | 11a |    |
| <b>b</b>   | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)                                                                                                               | 11b |    |
| <b>12a</b> | <b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?                                                                                                                          |     |    |
| <b>b</b>   | If "Yes," enter the amount of tax-exempt interest received or accrued during the year                                                                                                                                                      | 12b |    |
| <b>13</b>  | <b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>                                                                                                                                                                    |     |    |
| <b>a</b>   | Is the organization licensed to issue qualified health plans in more than one state?<br><b>Note.</b> See the instructions for additional information the organization must report on Schedule O.                                           |     |    |
| <b>b</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 |    |
| <b>c</b>   | Enter the amount of reserves on hand                                                                                                                                                                                                       | 13c |    |
| <b>14a</b> | Did the organization receive any payments for indoor tanning services during the tax year?                                                                                                                                                 |     | X  |
| <b>b</b>   | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O                                                                                                                                  | 14b |    |



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

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

☒**Section A. Governing Body and Management**

|                                                                                                                                                                                                                                                                                                                                       | Yes       | No                                  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------------------------------|
| <b>1a</b> Enter the number of voting members of the governing body at the end of the tax year ..... <b>1a</b> 18<br>If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O. |           |                                     |
| <b>b</b> Enter the number of voting members included in line 1a, above, who are independent ..... <b>1b</b> 18                                                                                                                                                                                                                        |           |                                     |
| <b>2</b> 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? .....                                                                                                                                                  | <b>2</b>  | <input checked="" type="checkbox"/> |
| <b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? .....                                                                                                   | <b>3</b>  | <input checked="" type="checkbox"/> |
| <b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .....                                                                                                                                                                                                       | <b>4</b>  | <input checked="" type="checkbox"/> |
| <b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? .....                                                                                                                                                                                                             | <b>5</b>  | <input checked="" type="checkbox"/> |
| <b>6</b> Did the organization have members or stockholders? .....                                                                                                                                                                                                                                                                     | <b>6</b>  | <input checked="" type="checkbox"/> |
| <b>7a</b> 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? .....                                                                                                                                                                    | <b>7a</b> | <input checked="" type="checkbox"/> |
| <b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? .....                                                                                                                                                              | <b>7b</b> | <input checked="" type="checkbox"/> |
| <b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:                                                                                                                                                                                            |           |                                     |
| <b>a</b> The governing body? .....                                                                                                                                                                                                                                                                                                    | <b>8a</b> | <input checked="" type="checkbox"/> |
| <b>b</b> Each committee with authority to act on behalf of the governing body? .....                                                                                                                                                                                                                                                  | <b>8b</b> | <input checked="" type="checkbox"/> |
| <b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O .....                                                                                                           | <b>9</b>  | <input checked="" type="checkbox"/> |

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

|                                                                                                                                                                                                                                                                                                             | Yes        | No                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------------|
| <b>10a</b> Did the organization have local chapters, branches, or affiliates? .....                                                                                                                                                                                                                         | <b>10a</b> | <input checked="" type="checkbox"/> |
| <b>b</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? .....                                                                   | <b>10b</b> |                                     |
| <b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .....                                                                                                                                                                | <b>11a</b> | <input checked="" type="checkbox"/> |
| <b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.                                                                                                                                                                                                      |            |                                     |
| <b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13 .....                                                                                                                                                                                                    | <b>12a</b> | <input checked="" type="checkbox"/> |
| <b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .....                                                                                                                                                          | <b>12b</b> | <input checked="" type="checkbox"/> |
| <b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done .....                                                                                                                                           | <b>12c</b> | <input checked="" type="checkbox"/> |
| <b>13</b> Did the organization have a written whistleblower policy? .....                                                                                                                                                                                                                                   | <b>13</b>  | <input checked="" type="checkbox"/> |
| <b>14</b> Did the organization have a written document retention and destruction policy? .....                                                                                                                                                                                                              | <b>14</b>  | <input checked="" type="checkbox"/> |
| <b>15</b> 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?                                                                              |            |                                     |
| <b>a</b> The organization's CEO, Executive Director, or top management official .....                                                                                                                                                                                                                       | <b>15a</b> | <input checked="" type="checkbox"/> |
| <b>b</b> Other officers or key employees of the organization .....                                                                                                                                                                                                                                          | <b>15b</b> | <input checked="" type="checkbox"/> |
| If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).                                                                                                                                                                                                                         |            |                                     |
| <b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? .....                                                                                                                                      | <b>16a</b> | <input checked="" type="checkbox"/> |
| <b>b</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? ..... | <b>16b</b> |                                     |

**Section C. Disclosure**

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

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☒ Own website ☒ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

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

**20** State the name, address, and telephone number of the person who possesses the organization's books and records: **COLLEEN MERKEL - 404-633-3777**  
**2200 LAKE BOULEVARD NE, ATLANTA, GA 30319**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

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

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

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

| (A)<br>Name and Title                                            | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                  |                                                                                     | Individual trustee or director                                                                               | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| (1) ABBY ABELSON, MD<br>PRESIDENT - 2017-2019                    | 5.00<br>14.00                                                                       | X                                                                                                            |                       | X       |              |                              |        | 45,700.                                                              | 0.                                                                        | 0.                                                                                            |
| (2) ERIC L. MATTESON, MD, MPH<br>PRESIDENT - 2015-2017           | 5.00<br>14.00                                                                       | X                                                                                                            |                       | X       |              |                              |        | 984.                                                                 | 1,268.                                                                    | 0.                                                                                            |
| (3) S. LOUIS BRIDGES, III, MD, PHD<br>VICE PRESIDENT - 2017-2019 | 5.00<br>2.00                                                                        | X                                                                                                            |                       | X       |              |                              |        | 0.                                                                   | 7,238.                                                                    | 0.                                                                                            |
| (4) CHARLES KING II, MD<br>TREASURER - 2017-2019                 | 5.00<br>14.00                                                                       | X                                                                                                            |                       | X       |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (5) ELLEN GRAVALLESE, MD<br>SECRETARY - 2016-2018                | 5.00<br>14.00                                                                       | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (6) BRYCE BINSTADT, MD, PHD<br>BOARD MEMBER                      | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (7) TIMOTHY NIEWOLD, MD<br>BOARD MEMBER                          | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 950.                                                                      | 0.                                                                                            |
| (8) STUART KASSAN, MD<br>BOARD MEMBER                            | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (9) TERESA TARRANT, MD<br>BOARD MEMBER                           | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (10) NORMAN GAYLIS, MD<br>BOARD MEMBER                           | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (11) ANNE R. BASS, MD<br>BOARD MEMBER                            | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 3,000.                                                                    | 0.                                                                                            |
| (12) ERIN ARNOLD, MD<br>BOARD MEMBER                             | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (13) MICHAEL MARICIC, MD<br>BOARD MEMBER                         | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (14) ANNE-MARIE MALFAIT, MD, PHD<br>BOARD MEMBER                 | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 2,273.                                                                    | 0.                                                                                            |
| (15) STEPHEN RUSSELL, MBA<br>BOARD MEMBER                        | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (16) ERIC SCHNED, MD<br>BOARD MEMBER                             | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (17) BEVERLY GUIN<br>BOARD MEMBER                                | 2.00                                                                                | X                                                                                                            |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |

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

| (A)<br>Name and title                                          | (B)<br>Average hours per week (list any hours for related organizations below line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|----------------------------------------------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                                |                                                                                     | Individual trustee or director                                                                            | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| (18) OLIVIER CHAMBENOIT, PHD<br>BOARD MEMBER                   | 2.00                                                                                | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (19) PATRICIA KATZ, PHD<br>BOARD MEMBER                        | 2.00                                                                                | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (20) RODOLFO MOLINA, MD<br>BOARD MEMBER                        | 2.00                                                                                | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (21) DAVID I. DAIKH, MD, PHD<br>BOARD MEMBER                   | 2.00<br>14.00                                                                       | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 44,851.                                                                   | 0.                                                                                            |
| (22) WILLIAM RIGBY, MD<br>BOARD MEMBER                         | 2.00                                                                                | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (23) SHARAD LAKHANPAL, MBBS, MD<br>BOARD MEMBER                | 2.00<br>14.00                                                                       | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 100,491.                                                                  | 0.                                                                                            |
| (24) JOAN MARIE VON FELDT, MD, MS ED<br>BOARD MEMBER           | 2.00<br>2.00                                                                        | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (25) AILEEN PANGAN, MD<br>BOARD MEMBER                         | 2.00                                                                                | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 0.                                                                        | 0.                                                                                            |
| (26) PAULA MACHETTA, MD, MBS<br>BOARD MEMBER                   | 2.00<br>14.00                                                                       | X                                                                                                         |                       |         |              |                              |        | 0.                                                                   | 51,113.                                                                   | 0.                                                                                            |
| <b>1b Sub-total</b>                                            |                                                                                     |                                                                                                           |                       |         |              |                              |        | 46,684.                                                              | 211,184.                                                                  | 0.                                                                                            |
| <b>c Total from continuation sheets to Part VII, Section A</b> |                                                                                     |                                                                                                           |                       |         |              |                              |        | 0.                                                                   | 479,896.                                                                  | 81,422.                                                                                       |
| <b>d Total (add lines 1b and 1c)</b>                           |                                                                                     |                                                                                                           |                       |         |              |                              |        | 46,684.                                                              | 691,080.                                                                  | 81,422.                                                                                       |

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

- 3** Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual **3** **X**
- 4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual **4** **X**
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person **5** **X**

**Section B. Independent Contractors**

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

| (A)<br>Name and business address                                              | (B)<br>Description of services | (C)<br>Compensation |
|-------------------------------------------------------------------------------|--------------------------------|---------------------|
| AMERICAN COLLEGE OF RHEUMATOLOGY<br>2200 LAKE BOULEVARD NE, ATLANTA, GA 30319 | MANAGEMENT SERVICES            | 2,454,080.          |
|                                                                               |                                |                     |
|                                                                               |                                |                     |
|                                                                               |                                |                     |
|                                                                               |                                |                     |

**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 **1**

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2017)



732201  
04-01-17

**Part VIII** Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

|                                                           |                                              |                                                                                                                                         |                                                       | (A)<br>Total revenue | (B)<br>Related or<br>exempt function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue excluded<br>from tax under<br>sections<br>512 - 514 |            |
|-----------------------------------------------------------|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|----------------------|-------------------------------------------------|-----------------------------------------|--------------------------------------------------------------------|------------|
| Contributions, Gifts, Grants<br>and Other Similar Amounts | 1 a                                          | Federated campaigns .....                                                                                                               | 1a                                                    |                      |                                                 |                                         |                                                                    |            |
|                                                           | b                                            | Membership dues .....                                                                                                                   | 1b                                                    |                      |                                                 |                                         |                                                                    |            |
|                                                           | c                                            | Fundraising events .....                                                                                                                | 1c                                                    |                      |                                                 |                                         |                                                                    |            |
|                                                           | d                                            | Related organizations .....                                                                                                             | 1d                                                    |                      |                                                 |                                         |                                                                    |            |
|                                                           | e                                            | Government grants (contributions) .....                                                                                                 | 1e                                                    |                      |                                                 |                                         |                                                                    |            |
|                                                           | f                                            | All other contributions, gifts, grants, and<br>similar amounts not included above .....                                                 | 1f                                                    | 27,525,009.          |                                                 |                                         |                                                                    |            |
|                                                           | g                                            | Noncash contributions included in lines 1a-1f: \$ .....                                                                                 |                                                       | 148,414.             |                                                 |                                         |                                                                    |            |
|                                                           | h                                            | <b>Total.</b> Add lines 1a-1f .....                                                                                                     |                                                       | 27,525,009.          |                                                 |                                         |                                                                    |            |
| Program Service<br>Revenue                                | Business Code                                |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | 2 a                                          |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | b                                            |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | c                                            |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | d                                            |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | e                                            |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | f                                            | All other program service revenue .....                                                                                                 |                                                       |                      |                                                 |                                         |                                                                    |            |
| g                                                         | <b>Total.</b> Add lines 2a-2f .....          |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
| Other Revenue                                             | 3                                            | Investment income (including dividends, interest, and<br>other similar amounts) .....                                                   |                                                       | 908,590.             |                                                 |                                         | 908,590.                                                           |            |
|                                                           | 4                                            | Income from investment of tax-exempt bond proceeds .....                                                                                |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | 5                                            | Royalties .....                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           | 6 a                                          | Gross rents .....                                                                                                                       | (i) Real                                              | (ii) Personal        |                                                 |                                         |                                                                    |            |
|                                                           |                                              | b                                                                                                                                       | Less: rental expenses .....                           |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | c                                                                                                                                       | Rental income or (loss) .....                         |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | d                                                                                                                                       | Net rental income or (loss) .....                     |                      |                                                 |                                         |                                                                    |            |
|                                                           | 7 a                                          | Gross amount from sales of<br>assets other than inventory .....                                                                         | (i) Securities                                        | (ii) Other           |                                                 |                                         |                                                                    |            |
|                                                           |                                              | b                                                                                                                                       | Less: cost or other basis<br>and sales expenses ..... |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | c                                                                                                                                       | Gain or (loss) .....                                  |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | d                                                                                                                                       | Net gain or (loss) .....                              |                      |                                                 | 1,134,058.                              |                                                                    | 1,134,058. |
|                                                           | 8 a                                          | Gross income from fundraising events (not<br>including \$ _____ of<br>contributions reported on line 1c). See<br>Part IV, line 18 ..... | a                                                     |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | b                                                                                                                                       | Less: direct expenses .....                           | b                    |                                                 |                                         |                                                                    |            |
|                                                           |                                              | c                                                                                                                                       | Net income or (loss) from fundraising events .....    |                      |                                                 |                                         |                                                                    |            |
|                                                           | 9 a                                          | Gross income from gaming activities. See<br>Part IV, line 19 .....                                                                      | a                                                     |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | b                                                                                                                                       | Less: direct expenses .....                           | b                    |                                                 |                                         |                                                                    |            |
|                                                           |                                              | c                                                                                                                                       | Net income or (loss) from gaming activities .....     |                      |                                                 |                                         |                                                                    |            |
|                                                           | 10 a                                         | Gross sales of inventory, less returns<br>and allowances .....                                                                          | a                                                     |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              | b                                                                                                                                       | Less: cost of goods sold .....                        | b                    |                                                 |                                         |                                                                    |            |
|                                                           |                                              | c                                                                                                                                       | Net income or (loss) from sales of inventory .....    |                      |                                                 |                                         |                                                                    |            |
| Miscellaneous Revenue                                     |                                              |                                                                                                                                         | Business Code                                         |                      |                                                 |                                         |                                                                    |            |
| 11 a                                                      |                                              |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
|                                                           |                                              |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
| e                                                         | <b>Total.</b> Add lines 11a-11d .....        |                                                                                                                                         |                                                       |                      |                                                 |                                         |                                                                    |            |
| 12                                                        | <b>Total revenue.</b> See instructions. .... |                                                                                                                                         |                                                       | 29,567,657.          | 0.                                              | 0.                                      | 2,042,648.                                                         |            |

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.

|                                                                                                                                                                                                              | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| <b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21                                                                                                | 9,152,969.            | 9,152,969.                      |                                        |                             |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22                                                                                                                           | 218,075.              | 218,075.                        |                                        |                             |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16                                                                    |                       |                                 |                                        |                             |
| <b>4</b> Benefits paid to or for members                                                                                                                                                                     |                       |                                 |                                        |                             |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees                                                                                                                            | 46,684.               | 46,684.                         |                                        |                             |
| <b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)                                                       |                       |                                 |                                        |                             |
| <b>7</b> Other salaries and wages                                                                                                                                                                            |                       |                                 |                                        |                             |
| <b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)                                                                                                  |                       |                                 |                                        |                             |
| <b>9</b> Other employee benefits                                                                                                                                                                             |                       |                                 |                                        |                             |
| <b>10</b> Payroll taxes                                                                                                                                                                                      |                       |                                 |                                        |                             |
| <b>11</b> Fees for services (non-employees):                                                                                                                                                                 |                       |                                 |                                        |                             |
| <b>a</b> Management                                                                                                                                                                                          | 2,454,079.            | 976,135.                        | 208,425.                               | 1,269,519.                  |
| <b>b</b> Legal                                                                                                                                                                                               | 15,899.               | 7,026.                          | 4,361.                                 | 4,512.                      |
| <b>c</b> Accounting                                                                                                                                                                                          | 36,079.               | 20,145.                         | 9,219.                                 | 6,715.                      |
| <b>d</b> Lobbying                                                                                                                                                                                            |                       |                                 |                                        |                             |
| <b>e</b> Professional fundraising services. See Part IV, line 17                                                                                                                                             |                       |                                 |                                        |                             |
| <b>f</b> Investment management fees                                                                                                                                                                          | 103,709.              | 60,677.                         | 43,032.                                |                             |
| <b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)                                                                                             | 576,433.              | 90,306.                         | 83,177.                                | 402,950.                    |
| <b>12</b> Advertising and promotion                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>13</b> Office expenses                                                                                                                                                                                    | 119,300.              | 18,813.                         | 40,496.                                | 59,991.                     |
| <b>14</b> Information technology                                                                                                                                                                             |                       |                                 |                                        |                             |
| <b>15</b> Royalties                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>16</b> Occupancy                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>17</b> Travel                                                                                                                                                                                             | 457,571.              | 210,595.                        | 46,054.                                | 200,922.                    |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials                                                                                                     |                       |                                 |                                        |                             |
| <b>19</b> Conferences, conventions, and meetings                                                                                                                                                             | 286,467.              | 140,393.                        | 23,739.                                | 122,335.                    |
| <b>20</b> Interest                                                                                                                                                                                           | -247.                 |                                 | -247.                                  |                             |
| <b>21</b> Payments to affiliates                                                                                                                                                                             |                       |                                 |                                        |                             |
| <b>22</b> Depreciation, depletion, and amortization                                                                                                                                                          | 39,745.               | 23,847.                         | 7,949.                                 | 7,949.                      |
| <b>23</b> Insurance                                                                                                                                                                                          |                       |                                 |                                        |                             |
| <b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.) |                       |                                 |                                        |                             |
| <b>a</b> MISCELLANEOUS                                                                                                                                                                                       | 16,509.               |                                 | 14,225.                                | 2,284.                      |
| <b>b</b>                                                                                                                                                                                                     |                       |                                 |                                        |                             |
| <b>c</b>                                                                                                                                                                                                     |                       |                                 |                                        |                             |
| <b>d</b>                                                                                                                                                                                                     |                       |                                 |                                        |                             |
| <b>e</b> All other expenses                                                                                                                                                                                  |                       |                                 |                                        |                             |
| <b>25</b> Total functional expenses. Add lines 1 through 24e                                                                                                                                                 | 13,523,272.           | 10,965,665.                     | 480,430.                               | 2,077,177.                  |
| <b>26</b> 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)<br>Beginning of year |             | (B)<br>End of year |
|---------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|-------------|--------------------|
| <b>Assets</b>                                                             | 1 Cash - non-interest-bearing .....                                                                                                                                                                                                                                                                                                |                          | 1           |                    |
|                                                                           | 2 Savings and temporary cash investments .....                                                                                                                                                                                                                                                                                     | 4,514,680.               | 2           | 4,663,232.         |
|                                                                           | 3 Pledges and grants receivable, net .....                                                                                                                                                                                                                                                                                         | 6,267,054.               | 3           | 21,676,834.        |
|                                                                           | 4 Accounts receivable, net .....                                                                                                                                                                                                                                                                                                   | 60.                      | 4           | 14.                |
|                                                                           | 5 Loans and other receivables from current and former officers, directors,<br>trustees, key employees, and highest compensated employees. Complete<br>Part II of Schedule L .....                                                                                                                                                  |                          | 5           |                    |
|                                                                           | 6 Loans and other receivables from other disqualified persons (as defined under<br>section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing<br>employers and sponsoring organizations of section 501(c)(9) voluntary<br>employees' beneficiary organizations (see instr). Complete Part II of Sch L ..... |                          | 6           |                    |
|                                                                           | 7 Notes and loans receivable, net .....                                                                                                                                                                                                                                                                                            |                          | 7           |                    |
|                                                                           | 8 Inventories for sale or use .....                                                                                                                                                                                                                                                                                                |                          | 8           |                    |
|                                                                           | 9 Prepaid expenses and deferred charges .....                                                                                                                                                                                                                                                                                      | 34,870.                  | 9           | 41,212.            |
|                                                                           | 10a Land, buildings, and equipment: cost or other<br>basis. Complete Part VI of Schedule D .....                                                                                                                                                                                                                                   | 10a 349,186.             |             |                    |
|                                                                           | b Less: accumulated depreciation .....                                                                                                                                                                                                                                                                                             | 10b 215,476.             | 10c         | 133,710.           |
|                                                                           | 11 Investments - publicly traded securities .....                                                                                                                                                                                                                                                                                  | 36,110,970.              | 11          | 39,720,696.        |
|                                                                           | 12 Investments - other securities. See Part IV, line 11 .....                                                                                                                                                                                                                                                                      | 4,681,409.               | 12          | 2,550,397.         |
|                                                                           | 13 Investments - program-related. See Part IV, line 11 .....                                                                                                                                                                                                                                                                       |                          | 13          |                    |
|                                                                           | 14 Intangible assets .....                                                                                                                                                                                                                                                                                                         |                          | 14          |                    |
|                                                                           | 15 Other assets. See Part IV, line 11 .....                                                                                                                                                                                                                                                                                        | 2,802,367.               | 15          | 2,803,946.         |
| 16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) ..... | 54,584,865.                                                                                                                                                                                                                                                                                                                        | 16                       | 71,590,041. |                    |
| <b>Liabilities</b>                                                        | 17 Accounts payable and accrued expenses .....                                                                                                                                                                                                                                                                                     | 642,615.                 | 17          | 759,595.           |
|                                                                           | 18 Grants payable .....                                                                                                                                                                                                                                                                                                            |                          | 18          |                    |
|                                                                           | 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 current and former officers, directors, trustees,<br>key employees, highest compensated employees, and disqualified persons.<br>Complete Part II of Schedule L .....                                                                                                                                |                          | 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<br>parties, and other liabilities not included on lines 17-24). Complete Part X of<br>Schedule D .....                                                                                                                                               |                          | 25          |                    |
|                                                                           | 26 <b>Total liabilities.</b> Add lines 17 through 25 .....                                                                                                                                                                                                                                                                         | 642,615.                 | 26          | 759,595.           |
| <b>Net Assets or Fund Balances</b>                                        | <b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and<br/>complete lines 27 through 29, and lines 33 and 34.</b>                                                                                                                                                                     |                          |             |                    |
|                                                                           | 27 Unrestricted net assets .....                                                                                                                                                                                                                                                                                                   | 36,156,417.              | 27          | 39,594,345.        |
|                                                                           | 28 Temporarily restricted net assets .....                                                                                                                                                                                                                                                                                         | 14,480,038.              | 28          | 26,705,502.        |
|                                                                           | 29 Permanently restricted net assets .....                                                                                                                                                                                                                                                                                         | 3,305,795.               | 29          | 4,530,599.         |
|                                                                           | <b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/><br/>and complete lines 30 through 34.</b>                                                                                                                                                                                              |                          |             |                    |
|                                                                           | 30 Capital stock or trust principal, or current funds .....                                                                                                                                                                                                                                                                        |                          | 30          |                    |
|                                                                           | 31 Paid-in or capital surplus, or land, building, or equipment fund .....                                                                                                                                                                                                                                                          |                          | 31          |                    |
|                                                                           | 32 Retained earnings, endowment, accumulated income, or other funds .....                                                                                                                                                                                                                                                          |                          | 32          |                    |
|                                                                           | 33 Total net assets or fund balances .....                                                                                                                                                                                                                                                                                         | 53,942,250.              | 33          | 70,830,446.        |
|                                                                           | 34 <b>Total liabilities and net assets/fund balances</b> .....                                                                                                                                                                                                                                                                     | 54,584,865.              | 34          | 71,590,041.        |

**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  | 29,567,657. |
| 2  | Total expenses (must equal Part IX, column (A), line 25)                                                       | 2  | 13,523,272. |
| 3  | Revenue less expenses. Subtract line 2 from line 1                                                             | 3  | 16,044,385. |
| 4  | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))                      | 4  | 53,942,250. |
| 5  | Net unrealized gains (losses) on investments                                                                   | 5  | 655,704.    |
| 6  | Donated services and use of facilities                                                                         | 6  |             |
| 7  | Investment expenses                                                                                            | 7  |             |
| 8  | Prior period adjustments                                                                                       | 8  |             |
| 9  | Other changes in net assets or fund balances (explain in Schedule O)                                           | 9  | 188,107.    |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | 10 | 70,830,446. |

**Part XII Financial Statements and Reporting**

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

☒

- 1 Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other
- If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant?
- If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:
- ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- b Were the organization's financial statements audited by an independent accountant?
- If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:
- ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?
- If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

|    | Yes | No |
|----|-----|----|
|    |     |    |
| 2a |     | X  |
|    |     |    |
| 2b | X   |    |
|    |     |    |
| 2c | X   |    |
|    |     |    |
| 3a |     | X  |
|    |     |    |
| 3b |     |    |

Form 990 (2017)



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

Department of the Treasury  
Internal Revenue Service

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

OMB No. 1545-0047

**2017**

**Open to Public Inspection**

Name of the organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

Employer identification number

**58-1654301**

**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 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations .....
- g Provide the following information about the supported organization(s).

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

**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) 2013  | (b) 2014 | (c) 2015 | (d) 2016  | (e) 2017  | (f) Total |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|----------|-----------|-----------|-----------|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....                                                                                                  | 12371657. | 2697622. | 3554779. | 14568184. | 27525009. | 60717251. |
| 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 <b>Total.</b> Add lines 1 through 3 .....                                                                                                                                                                 | 12371657. | 2697622. | 3554779. | 14568184. | 27525009. | 60717251. |
| 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) ..... |           |          |          |           |           | 34979188. |
| 6 <b>Public support.</b> Subtract line 5 from line 4.                                                                                                                                                       |           |          |          |           |           | 25738063. |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ►                                                                                                                                                        | (a) 2013  | (b) 2014 | (c) 2015 | (d) 2016  | (e) 2017  | (f) Total                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|----------|-----------|-----------|--------------------------|
| 7 Amounts from line 4 .....                                                                                                                                                                          | 12371657. | 2697622. | 3554779. | 14568184. | 27525009. | 60717251.                |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....                                                              | 972,457.  | 1000568. | 942,916. | 951,734.  | 908,590.  | 4776265.                 |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on .....                                                                                           |           |          |          |           |           |                          |
| 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....                                                                                             |           |          |          |           |           |                          |
| 11 <b>Total support.</b> Add lines 7 through 10 .....                                                                                                                                                |           |          |          |           |           | 65493516.                |
| 12 Gross receipts from related activities, etc. (see instructions) .....                                                                                                                             |           |          |          |           | 12        |                          |
| 13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ..... |           |          |          |           |           | <input type="checkbox"/> |

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

|                                                                                                                                                                                                                                                                                                                                                                                                                     |    |       |                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-------|-------------------------------------|
| 14 Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f)) .....                                                                                                                                                                                                                                                                                                                     | 14 | 39.30 | %                                   |
| 15 Public support percentage from 2016 Schedule A, Part II, line 14 .....                                                                                                                                                                                                                                                                                                                                           | 15 | 35.98 | %                                   |
| 16a <b>33 1/3% support test - 2017.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....                                                                                                                                                                            |    |       | <input checked="" type="checkbox"/> |
| b <b>33 1/3% support test - 2016.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....                                                                                                                                                                         |    |       | <input type="checkbox"/>            |
| 17a <b>10% -facts-and-circumstances test - 2017.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....    |    |       | <input type="checkbox"/>            |
| b <b>10% -facts-and-circumstances test - 2016.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ..... |    |       | <input type="checkbox"/>            |
| 18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....                                                                                                                                                                                                                                                                  |    |       | <input type="checkbox"/>            |

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

(Complete only if you checked the box on line 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) 2013 | (b) 2014 | (c) 2015 | (d) 2016 | (e) 2017 | (f) Total |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....                                                                       |          |          |          |          |          |           |
| <b>2</b> 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 ..... |          |          |          |          |          |           |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....                                                                             |          |          |          |          |          |           |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....                                                                          |          |          |          |          |          |           |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....                                                                  |          |          |          |          |          |           |
| <b>6 Total.</b> Add lines 1 through 5 .....                                                                                                                                             |          |          |          |          |          |           |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....                                                                                                |          |          |          |          |          |           |
| <b>b</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 .....           |          |          |          |          |          |           |
| <b>c</b> Add lines 7a and 7b .....                                                                                                                                                      |          |          |          |          |          |           |
| <b>8 Public support.</b> (Subtract line 7c from line 6.) .....                                                                                                                          |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ►                                                                                                                                                        | (a) 2013 | (b) 2014 | (c) 2015 | (d) 2016 | (e) 2017 | (f) Total |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6 .....                                                                                                                                                                   |          |          |          |          |          |           |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....                                                     |          |          |          |          |          |           |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....                                                                               |          |          |          |          |          |           |
| <b>c</b> Add lines 10a and 10b .....                                                                                                                                                                 |          |          |          |          |          |           |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....                                                          |          |          |          |          |          |           |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....                                                                                      |          |          |          |          |          |           |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) .....                                                                                                                                       |          |          |          |          |          |           |
| <b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ..... |          |          |          |          |          |           |

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

|                                                                                                        |           |   |
|--------------------------------------------------------------------------------------------------------|-----------|---|
| <b>15</b> Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f)) ..... | <b>15</b> | % |
| <b>16</b> Public support percentage from 2016 Schedule A, Part III, line 15 .....                      | <b>16</b> | % |

**Section D. Computation of Investment Income Percentage**

|                                                                                                             |           |   |
|-------------------------------------------------------------------------------------------------------------|-----------|---|
| <b>17</b> Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f)) ..... | <b>17</b> | % |
| <b>18</b> Investment income percentage from 2016 Schedule A, Part III, line 17 .....                        | <b>18</b> | % |

**19a 33 1/3% support tests - 2017.** 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 - 2016.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization .....

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

**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

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

|     | Yes | No |
|-----|-----|----|
|     |     |    |
| 1   |     |    |
|     |     |    |
| 2   |     |    |
|     |     |    |
| 3a  |     |    |
|     |     |    |
| 3b  |     |    |
|     |     |    |
| 3c  |     |    |
|     |     |    |
| 4a  |     |    |
|     |     |    |
| 4b  |     |    |
|     |     |    |
| 4c  |     |    |
|     |     |    |
| 5a  |     |    |
|     |     |    |
| 5b  |     |    |
|     |     |    |
| 5c  |     |    |
|     |     |    |
| 6   |     |    |
|     |     |    |
| 7   |     |    |
|     |     |    |
| 8   |     |    |
|     |     |    |
| 9a  |     |    |
|     |     |    |
| 9b  |     |    |
|     |     |    |
| 9c  |     |    |
|     |     |    |
| 10a |     |    |
|     |     |    |
| 10b |     |    |

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

- 11 Has the organization accepted a gift or contribution from any of the following persons?
- a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?
- b A family member of a person described in (a) above?
- c A 35% controlled entity of a person described in (a) or (b) above? *If "Yes" to a, b, or c, provide detail in Part VI.*

|     | Yes | No |
|-----|-----|----|
|     |     |    |
| 11a |     |    |
| 11b |     |    |
| 11c |     |    |

**Section B. Type I Supporting Organizations**

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

|   | Yes | No |
|---|-----|----|
|   |     |    |
| 1 |     |    |
|   |     |    |
| 2 |     |    |

**Section C. Type II Supporting Organizations**

- 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).*

|   | Yes | No |
|---|-----|----|
|   |     |    |
| 1 |     |    |

**Section D. All Type III Supporting Organizations**

- 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?
- 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).*
- 3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.*

|   | Yes | No |
|---|-----|----|
|   |     |    |
| 1 |     |    |
|   |     |    |
| 2 |     |    |
|   |     |    |
| 3 |     |    |

**Section E. Type III Functionally Integrated Supporting Organizations**

- 1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).
- a ☐ The organization satisfied the Activities Test. Complete line 2 below.
- b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.
- c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).

2 Activities Test. Answer (a) and (b) below.

- a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*
- b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*
- 3 Parent of Supported Organizations. Answer (a) and (b) below.
- a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *Provide details in Part VI.*
- b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If "Yes," describe in Part VI the role played by the organization in this regard.*

|    | Yes | No |
|----|-----|----|
|    |     |    |
| 2a |     |    |
|    |     |    |
| 2b |     |    |
|    |     |    |
| 3a |     |    |
|    |     |    |
| 3b |     |    |



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

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

| Section A - Adjusted Net Income |                                                                                                                                                                                                          | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-----------------------------|
| 1                               | Net short-term capital gain                                                                                                                                                                              | 1              |                             |
| 2                               | Recoveries of prior-year distributions                                                                                                                                                                   | 2              |                             |
| 3                               | Other gross income (see instructions)                                                                                                                                                                    | 3              |                             |
| 4                               | Add lines 1 through 3                                                                                                                                                                                    | 4              |                             |
| 5                               | Depreciation and depletion                                                                                                                                                                               | 5              |                             |
| 6                               | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | 6              |                             |
| 7                               | Other expenses (see instructions)                                                                                                                                                                        | 7              |                             |
| 8                               | <b>Adjusted Net Income</b> (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                                | <b>Total</b> (add lines 1a, 1b, and 1c)                                                                                         | 1d             |                             |
| e                                | <b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI):                                           |                |                             |
| 2                                | Acquisition indebtedness applicable to non-exempt-use assets                                                                    | 2              |                             |
| 3                                | Subtract line 2 from line 1d                                                                                                    | 3              |                             |
| 4                                | Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)                                  | 4              |                             |
| 5                                | Net value of non-exempt-use assets (subtract line 4 from line 3)                                                                | 5              |                             |
| 6                                | Multiply line 5 by .035                                                                                                         | 6              |                             |
| 7                                | Recoveries of prior-year distributions                                                                                          | 7              |                             |
| 8                                | <b>Minimum Asset Amount</b> (add line 7 to line 6)                                                                              | 8              |                             |

| Section C - Distributable Amount |                                                                                                                                                                           |   | Current Year |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|--------------|
| 1                                | Adjusted net income for prior year (from Section A, line 8, Column A)                                                                                                     | 1 |              |
| 2                                | Enter 85% of line 1                                                                                                                                                       | 2 |              |
| 3                                | Minimum asset amount for prior year (from Section B, line 8, Column A)                                                                                                    | 3 |              |
| 4                                | Enter greater of line 2 or line 3                                                                                                                                         | 4 |              |
| 5                                | Income tax imposed in prior year                                                                                                                                          | 5 |              |
| 6                                | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)                                              | 6 |              |
| 7                                | <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions). |   |              |

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

| Section D - Distributions                                                                                                                    | Current Year |
|----------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| 1 Amounts paid to supported organizations to accomplish exempt purposes                                                                      |              |
| 2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity      |              |
| 3 Administrative expenses paid to accomplish exempt purposes of supported organizations                                                      |              |
| 4 Amounts paid to acquire exempt-use assets                                                                                                  |              |
| 5 Qualified set-aside amounts (prior IRS approval required)                                                                                  |              |
| 6 Other distributions (describe in Part VI). See instructions.                                                                               |              |
| 7 <b>Total annual distributions.</b> Add lines 1 through 6.                                                                                  |              |
| 8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions. |              |
| 9 Distributable amount for 2017 from Section C, line 6                                                                                       |              |
| 10 Line 8 amount divided by line 9 amount                                                                                                    |              |

| Section E - Distribution Allocations (see instructions)                                                                                                                   | (i)<br>Excess Distributions | (ii)<br>Underdistributions<br>Pre-2017 | (iii)<br>Distributable<br>Amount for 2017 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|----------------------------------------|-------------------------------------------|
| 1 Distributable amount for 2017 from Section C, line 6                                                                                                                    |                             |                                        |                                           |
| 2 Underdistributions, if any, for years prior to 2017 (reasonable cause required- explain in Part VI). See instructions.                                                  |                             |                                        |                                           |
| 3 Excess distributions carryover, if any, to 2017                                                                                                                         |                             |                                        |                                           |
| a                                                                                                                                                                         |                             |                                        |                                           |
| b From 2013                                                                                                                                                               |                             |                                        |                                           |
| c From 2014                                                                                                                                                               |                             |                                        |                                           |
| d From 2015                                                                                                                                                               |                             |                                        |                                           |
| e From 2016                                                                                                                                                               |                             |                                        |                                           |
| f <b>Total of lines 3a through e</b>                                                                                                                                      |                             |                                        |                                           |
| g Applied to underdistributions of prior years                                                                                                                            |                             |                                        |                                           |
| h Applied to 2017 distributable amount                                                                                                                                    |                             |                                        |                                           |
| i Carryover from 2012 not applied (see instructions)                                                                                                                      |                             |                                        |                                           |
| j <b>Remainder. Subtract lines 3g, 3h, and 3i from 3f.</b>                                                                                                                |                             |                                        |                                           |
| 4 Distributions for 2017 from Section D, line 7: \$                                                                                                                       |                             |                                        |                                           |
| a Applied to underdistributions of prior years                                                                                                                            |                             |                                        |                                           |
| b Applied to 2017 distributable amount                                                                                                                                    |                             |                                        |                                           |
| c <b>Remainder. Subtract lines 4a and 4b from 4.</b>                                                                                                                      |                             |                                        |                                           |
| 5 Remaining underdistributions for years prior to 2017, 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 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.                        |                             |                                        |                                           |
| 7 <b>Excess distributions carryover to 2018.</b> Add lines 3j and 4c.                                                                                                     |                             |                                        |                                           |
| 8 Breakdown of line 7:                                                                                                                                                    |                             |                                        |                                           |
| a Excess from 2013                                                                                                                                                        |                             |                                        |                                           |
| b Excess from 2014                                                                                                                                                        |                             |                                        |                                           |
| c Excess from 2015                                                                                                                                                        |                             |                                        |                                           |
| d Excess from 2016                                                                                                                                                        |                             |                                        |                                           |
| e Excess from 2017                                                                                                                                                        |                             |                                        |                                           |

|         |                           |
|---------|---------------------------|
| Part VI | Supplemental Information. |
|---------|---------------------------|

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

# Schedule B

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

Department of the Treasury  
Internal Revenue Service

# Schedule of Contributors

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

# 2017

Name of the organization

RHEUMATOLOGY RESEARCH FOUNDATION

Employer identification number

58-1654301

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)( 3 ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

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

## General Rule

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

## Special Rules

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... ▶ \$ .....

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

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

RHEUMATOLOGY RESEARCH FOUNDATION

58-1654301

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

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4 | (c)<br>Total contributions | (d)<br>Type of contribution                                                                                                                                         |
|------------|-----------------------------------|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>1</u>   |                                   | \$ <u>10,500,000.</u>      | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| <u>2</u>   |                                   | \$ <u>7,500,000.</u>       | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| <u>3</u>   |                                   | \$ <u>1,000,000.</u>       | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| <u>4</u>   |                                   | \$ <u>2,500,000.</u>       | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| <u>5</u>   |                                   | \$ <u>1,000,000.</u>       | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| <u>6</u>   |                                   | \$ <u>2,500,000.</u>       | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |



|                                         |                                |
|-----------------------------------------|--------------------------------|
| Name of organization                    | Employer identification number |
| <b>RHEUMATOLOGY RESEARCH FOUNDATION</b> | <b>58-1654301</b>              |

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

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

Name of organization

Employer identification number

**RHEUMATOLOGY RESEARCH FOUNDATION****58-1654301****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.<br>from<br>Part I | (b) Purpose of gift                     | (c) Use of gift | (d) Description of how gift is held      |
|---------------------------|-----------------------------------------|-----------------|------------------------------------------|
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |

**SCHEDULE D**  
(Form 990)Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**▶ Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
▶ Attach to Form 990.▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2017**Open to Public  
Inspection

Name of the organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

Employer identification number

**58-1654301****Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the

organization answered "Yes" on Form 990, Part IV, line 6.

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

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).

|                                                                                              |                                                                             |
|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| <input type="checkbox"/> Preservation of land for public use (e.g., recreation or education) | <input type="checkbox"/> Preservation of a historically important land area |
| <input type="checkbox"/> Protection of natural habitat                                       | <input type="checkbox"/> Preservation of a certified historic structure     |
| <input type="checkbox"/> Preservation of open space                                          |                                                                             |

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

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

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

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

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

☐ Yes ☐ No

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

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

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

☐ Yes ☐ No

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

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

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

|                                                           |            |
|-----------------------------------------------------------|------------|
| (i) Revenue included on Form 990, Part VIII, line 1 ..... | ▶ \$ ..... |
| (ii) Assets included in Form 990, Part X .....            | ▶ \$ ..... |

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

|                                                         |            |
|---------------------------------------------------------|------------|
| a Revenue included on Form 990, Part VIII, line 1 ..... | ▶ \$ ..... |
| b Assets included in Form 990, Part X .....             | ▶ \$ ..... |

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

Schedule D (Form 990) 2017

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

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

- a ☐ Public exhibition  
 b ☐ Scholarly research  
 c ☐ Preservation for future generations

- d ☐ Loan or exchange programs  
 e ☐ Other \_\_\_\_\_

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

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

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

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

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

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

|    | Amount |
|----|--------|
| 1c |        |
| 1d |        |
| 1e |        |
| 1f |        |

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

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

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

|                                                  | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--------------------------------------------------|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance                     | 36,936,465.      | 34,351,990.    | 36,389,822.        | 36,829,615.          | 32,511,985.         |
| b Contributions                                  | 1,224,804.       | 250,000.       |                    |                      | 992,516.            |
| c Net investment earnings, gains, and losses     | 2,412,361.       | 3,814,820.     | -413,655.          | 1,024,105.           | 4,650,774.          |
| d Grants or scholarships                         |                  |                |                    |                      |                     |
| e Other expenditures for facilities and programs | 1,888,193.       | 1,480,345.     | 1,624,177.         | 1,463,898.           | 1,325,660.          |
| f Administrative expenses                        |                  |                |                    |                      |                     |
| g End of year balance                            | 38,685,437.      | 36,936,465.    | 34,351,990.        | 36,389,822.          | 36,829,615.         |

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

a Board designated or quasi-endowment ☒ 82.58 %

b Permanent endowment ☒ 11.71 %

c Temporarily restricted endowment ☒ 5.71 %

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

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

(i) unrelated organizations

(ii) related organizations

|        | Yes | No |
|--------|-----|----|
| 3a(i)  |     | X  |
| 3a(ii) |     | X  |
| 3b     |     |    |

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

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

**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                                                                                         |                                      |                                 |                              |                |
| b Buildings                                                                                     |                                      |                                 |                              |                |
| c Leasehold improvements                                                                        |                                      |                                 |                              |                |
| d Equipment                                                                                     |                                      |                                 |                              |                |
| e Other                                                                                         |                                      | 349,186.                        | 215,476.                     | 133,710.       |
| Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) |                                      |                                 |                              | 133,710.       |

**Part VII Investments - Other Securities.**

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

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

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

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

**Part X Other Liabilities.**

Complete if the organization answered "Yes" 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) .....                                                                   |                |  |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ |                |  |

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



**Part 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  | 30,223,361. |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12:             |    |             |
| a | Net unrealized gains (losses) on investments                                    | 2a | 655,704.    |
| b | Donated services and use of facilities                                          | 2b |             |
| c | Recoveries of prior year grants                                                 | 2c |             |
| d | Other (Describe in Part XIII.)                                                  | 2d |             |
| e | Add lines 2a through 2d                                                         | 2e | 655,704.    |
| 3 | Subtract line 2e from line 1                                                    | 3  | 29,567,657. |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1:            |    |             |
| a | Investment expenses not included on Form 990, Part VIII, line 7b                | 4a |             |
| b | Other (Describe in Part XIII.)                                                  | 4b |             |
| c | Add lines 4a and 4b                                                             | 4c | 0.          |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) | 5  | 29,567,657. |

**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  | 13,335,165. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25:                |    |             |
| a | Donated services and use of facilities                                           | 2a |             |
| b | Prior year adjustments                                                           | 2b |             |
| c | Other losses                                                                     | 2c |             |
| d | Other (Describe in Part XIII.)                                                   | 2d |             |
| e | Add lines 2a through 2d                                                          | 2e | 0.          |
| 3 | Subtract line 2e from line 1                                                     | 3  | 13,335,165. |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1:               |    |             |
| a | Investment expenses not included on Form 990, Part VIII, line 7b                 | 4a |             |
| b | Other (Describe in Part XIII.)                                                   | 4b | 188,107.    |
| c | Add lines 4a and 4b                                                              | 4c | 188,107.    |
| 5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) | 5  | 13,523,272. |

**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:**

THE FOUNDATION'S ENDOWMENTS CONSIST OF THIRTEEN INDIVIDUAL FUNDS ESTABLISHED TO SUPPORT THE FOUNDATION'S MISSION THROUGH PROGRAMS OF RESEARCH AND TRAINING. ENDOWMENTS INCLUDE BOTH DONOR-RESTRICTED ENDOWMENT FUNDS, AND FUNDS DESIGNED BY THE BOARD OF DIRECTORS TO FUNCTION AS A GENERAL ENDOWMENT.

**PART X, LINE 2:**

THE FOUNDATION IS RECOGNIZED AS AN ORGANIZATION EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(A) OF THE INTERNAL REVENUE CODE (THE "CODE") AS AN ORGANIZATION DESCRIBED IN SECTION 501(C)(3) WHEREBY ONLY UNRELATED BUSINESS INCOME, AS DEFINED BY SECTION 512(A) OF THE CODE, IS SUBJECT TO

**Part XIII** Supplemental Information *(continued)*

FEDERAL INCOME TAX. ACCORDINGLY, NO PROVISION FOR INCOME TAXES HAS BEEN RECORDED.

THE FOUNDATION HAS EVALUATED ITS TAX POSITIONS AND DETERMINED THAT IT DOES NOT HAVE ANY MATERIAL UNRECOGNIZED TAX BENEFITS OR OBLIGATIONS AS OF JUNE 30, 2018.

**PART XII, LINE 4B - OTHER ADJUSTMENTS:**

|                                 |          |
|---------------------------------|----------|
| RECOVERIES OF PRIOR YEAR GRANTS | 188,107. |
|---------------------------------|----------|

**SCHEDULE I**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

► Attach to Form 990.

► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2017**

Open to Public  
Inspection

Name of the organization

Employer identification number  
**58-1654301**

**RHEUMATOLOGY RESEARCH FOUNDATION**

**Part I General Information on Grants and Assistance**

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

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

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

| 1 (a) Name and address of organization or government                                                     | (b) EIN    | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|----------------------------------------------------------------------------------------------------------|------------|---------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|--------------------------------------------|
| ALBERT EINSTEIN COLLEGE OF MEDICINE - 1300 MORRIS PARK AVE, FORCHHEIMER 107N - BRONX, NY 10461           | 47-2209056 | 501(C)(3)                       | 60,000.                  | 0.                                |                                                       |                                        | CLINICIAN SCHOLAR EDUCATOR                 |
| AMERICAN COLLEGE OF RHEUMATOLOGY 2200 LAKE BLVD NE ATLANTA, GA 30319                                     | 58-1627547 | 501(C)(6)                       | 350,000.                 | 0.                                |                                                       |                                        | FELLOWS FUND                               |
| ANN & ROBERT H. LURIE CHILDREN'S HOSPITAL CHICAGO - 225 E CHICAGO AVE, - CHICAGO, IL 60611               | 36-2170833 | 501(C)(3)                       | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| AUGUSTA UNIVERSITY 1120 15TH ST, SE 5086, AUGUSTA, GA 30912                                              | 58-6002053 | 501(C)(3)                       | 15,000.                  | 0.                                |                                                       |                                        | RESIDENT RESEARCH PRECEPTORSHIP            |
| AUGUSTA UNIVERSITY 1120 15TH ST, SE 5086, AUGUSTA, GA 30912                                              | 58-6002053 | 501(C)(3)                       | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| BAPTIST HEALTH FOUNDATION, INC. 1130 22ND ST, SOUTH SUITE 1000, BIRMINGHAM, AL 35205                     | 63-6062097 | 501(C)(3)                       | 9,853.                   | 0.                                |                                                       |                                        | RESIDENT RESEARCH PRECEPTORSHIP            |
| <b>2</b> Enter total number of section 501(c)(3) and government organizations listed in the line 1 table |            |                                 | 75.                      |                                   |                                                       |                                        |                                            |
| <b>3</b> Enter total number of other organizations listed in the line 1 table                            |            |                                 | 1.                       |                                   |                                                       |                                        |                                            |

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

Schedule I (Form 990) (2017)

**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
| BAYLOR COLLEGE OF MEDICINE<br>ONE BAYLOR PLAZA,, MAIL STOP BCM-31<br>HOUSTON, TX 77030-3411                                                 | 74-1613878 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD            |
| BETH ISRAEL DEACONESS MEDICAL CENTER - 330 BROOKLINE AVENUE, -<br>BOSTON, MA 02215                                                          | 04-2103881 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| BIOMEDICAL RESEARCH FOUNDATION OF COLORADO - 1055 CLERMONT ST. BOX 111-G, - DENVER, CO 80220                                                | 74-2427577 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| BOSTON CHILDREN'S HOSPITAL<br>PO BOX 414413, ATTN: RESEARCH FINAN<br>BOSTON, MA 02241-4413                                                  | 04-2774441 | 501(C)(3)                     | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (TRANSLATIONAL)         |
| BOSTON CHILDREN'S HOSPITAL<br>P.O.BOX 414413, ATTN: RESEARCH FINA<br>BOSTON, MA 02241-4413                                                  | 04-2774441 | 501(C)(3)                     | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (BASIC)                 |
| BRIGHAM & WOMEN'S HOSPITAL -<br>RESEARCH - BANK OF AMERICA, N.A.,<br>PO BOX 3149 - BOSTON, MA<br>02241-3149                                 | 04-2312909 | 501(C)(3)                     | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (TRANSLATIONAL)         |
| BRIGHAM & WOMEN'S HOSPITAL -<br>RESEARCH - BANK OF AMERICA N.A.,<br>P.O. BOX 3149 - BOSTON, MA<br>02241-3149                                | 04-2312909 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                  |
| BRIGHAM AND WOMEN'S HOSPITAL<br>BANK OF AMERICA N.A., PO BOX 3149<br>BOSTON, MA 02241-3149                                                  | 04-2312909 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT |
| BRIGHAM AND WOMEN'S HOSPITAL<br>75 FRANCIS STREET,<br>BOSTON, MA 02115                                                                      | 04-2312909 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD            |

Schedule I (Form 990)

## RHEUMATOLOGY RESEARCH FOUNDATION

Schedule I (Form 990)

## Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance            |
|--------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------|
| BRIGHAM AND WOMEN'S HOSPITAL<br>75 FRANCIS STREET,<br>BOSTON, MA 02115                                                                     | 04-2312909 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |
| BRIGHAM AND WOMEN'S HOSPITAL<br>ATTN: A. DONNELLY-BTM 6016S, 75 FRA<br>BOSTON, MA 02115                                                    | 04-2312909 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |
| BRIGHAM AND WOMEN'S HOSPITAL -<br>RESEARCH - BANK OF AMERICA N.A.,<br>P.O. BOX 3149 - BOSTON, MA<br>02241-3149                             | 04-2312909 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (BASIC)        |
| BRIGHAM AND WOMEN'S HOSPITAL -<br>RESEARCH - BANK OF AMERICA N.A.,<br>P.O. BOX 3149 - BOSTON, MA<br>02241-3149                             | 04-2312909 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                     |
| BRIGHAM AND WOMEN'S HOSPITAL-<br>RESEARCH - BANK OF AMERICA N.A.,<br>P.O. BOX 3149 - BOSTON, MA<br>02241-3149                              | 04-2312909 | 501(C)(3)                     | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD<br>(CLINICAL)              |
| BRIGHAM AND WOMEN'S HOSPITAL,<br>DIVISION OF RHEUMATOLOGY,<br>IMMUNOLOGY, ALLERGY - BANK OF<br>AMERICA N.A., P.O. BOX 3149 -               | 04-2312909 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (BASIC)        |
| CARLILION ROANKE MEMORIAL HOSPITAL<br>1906 BELVIEW AVE., SE, ATTN: VICKI<br>ROANOKE, VA 24014                                              | 54-0506332 | 501(C)(3)                     | 2,795.                   | 0.                                |                                                       |                                        | PEDIATRIC VISITING<br>PROFESSORSHIP           |
| CEDARS-SINAI MEDICAL CENTER<br>6500 WILSHIRE BLVD., #1150,<br>LOS ANGELES, CA 90048                                                        | 95-1644600 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD            |
| CHILDREN'S HOSPITAL & RESEARCH<br>CENTER AT OAKLAND - ATTENTION: DR<br>DAMINI JAWAHEER / KEN TSE (GRANTS<br>& ACCOUNTING), 5700 MARTIN L - | 94-0382330 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |

Schedule I (Form 990)

Schedule I (Form 990) **RHEUMATOLOGY RESEARCH FOUNDATION**

58-1654301

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**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance          |
|--------------------------------------------------------------------------------------------------------------------|------------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|---------------------------------------------|
| CHILDREN'S HOSPITAL MEDICAL CENTER<br>3333 BURNET AVENUE, MLC 4900<br>CINCINNATI, OH 45229-3039                    | 31-0833936 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| CHILDREN'S HOSPITAL OF PHILADELPHIA - LOCKBOX #1457, PO BOX 8500, LOCKBOX #1457 - PHILADELPHIA, PA 19178-1457      | 23-1352166 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT  |
| CHILDREN'S HOSPITAL OF PHILADELPHIA RESEARCH INSTITUTE - LOCKBOX #1457, PO BOX 8500, - PHILADELPHIA, PA 19178-1457 | 23-1352166 | 501(C)(3)                     | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (CLINICAL)               |
| CINCINNATI CHILDREN'S HOSPITAL MEDICAL CENTER - 3333 BURNET AVE, MLC 4010 - CINCINNATI, OH 45229-3039              | 31-0833936 | 501(C)(3)                     | 25,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (BASIC)         |
| CLEVELAND CLINIC<br>OFFICE OF SPONSORED, PO BOX 931531<br>CLEVELAND, OH 44195                                      | 34-0714585 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT  |
| COLUMBIA UNIVERSITY<br>SPONSORED PROJECTS FINANCE, POB 29789, GENERAL POST OFFICE - NEW YORK, NY 10                | 13-5598093 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (CLINICAL)      |
| COLUMBIA UNIVERSITY<br>SPONSORED PROJECTS FINANCE, P.O. BOX 29789 - NEW YORK, NY 10087-9789                        | 13-5598093 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL) |
| COLUMBIA UNIVERSITY<br>SPONSORED PROJECTS FINANCE, P.O. BOX 29789 - NEW YORK, NY 10087-9789                        | 13-5598093 | 501(C)(3)                     | 75,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL) |
| DENVER HEALTH<br>777 BANNOCK ST. MC4000,<br>DENVER, CO 80204                                                       | 84-1343242 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance            |
|---------------------------------------------------------------------------------------------------------------|------------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-----------------------------------------------|
| DENVER HEALTH<br>PO BOX 17093,<br>DENVER, CO 80217-0093                                                       | 84-1343242 | 501(C)(3)                     | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |
| DENVER HEALTH MEDICAL CENTER<br>PO BOX 17093,<br>DENVER, CO 80217-0093                                        | 84-1343242 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |
| DREXEL UNIVERSITY<br>TD BANK, PO BOX 95000-1090<br>PHILADELPHIA, PA 19195-1090                                | 23-1352630 | 501(C)(3)                     | 60,000.                  | 0.                                |                                                       |                                        | CLINICIAN SCHOLAR<br>EDUCATOR                 |
| DUKE UNIVERSITY<br>OFFICE OF SPONSORED PROGRAMS,<br>ACCOUNTS RECEIVABLE LOCKBOX P.O.<br>BOX 602651 -          | 56-0532129 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH<br>INNOVATIVE GRANT |
| DUKE UNIVERSITY<br>2200 W. MAIN STREET, SUITE 820<br>DURHAM, NC 27705-4677                                    | 56-0532129 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD            |
| DUKE UNIVERSITY MEDICAL CENTER<br>DIVISION OF RHEUMATOLOGY AND<br>IMMUNOLOGY, DUMC 3490 - DURHAM, NC<br>27710 | 56-0532129 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |
| EMORY UNIVERSITY<br>OFFICE OF SPONSORED PROGRAMS, 1599<br>ATLANTA, GA 30322                                   | 58-0566256 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP |
| FEINSTEIN INSTITUTE FOR MEDICAL<br>RESEARCH - 350 COMMUNITY DRIVE,<br>-<br>MANHASSET, NY 11030                | 11-2673595 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD            |
| GEORGETOWN UNIVERSITY<br>SPONSORED ACCOUNTING OFFICE, 2121<br>WISCONSIN AVE BOX 571164 -<br>WASHINGTON, DC    | 53-0196603 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD            |

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**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance          |
| HOSPITAL FOR SPECIAL SURGERY<br>535 E. 70TH ST.,<br>NEW YORK, NY 10021-4872                                                                 | 13-1624135 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (CLINICAL)      |
| JOHNS HOPKINS UNIVERSITY<br>733 N. BROADWAY, STE 117,<br>BALTIMORE, MD 21205                                                                | 52-0595110 | 501(C)(3)                     | 75,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL) |
| JOHNS HOPKINS UNIVERSITY<br>12529 COLLECTION CENTER DRIVE, C/O<br>BANK OF AMERICA - CHICAGO, IL<br>60693                                    | 52-0595110 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (CLINICAL)      |
| JOHNS HOPKINS UNIVERSITY<br>733 N BROADWAY , SUITE 117<br>BALTIMORE , MD 21205                                                              | 52-0595110 | 501(C)(3)                     | 52,500.                  | 0.                                |                                                       |                                        | CLINICIAN SCHOLAR EDUCATOR                  |
| MASSACHUSETTS GENERAL HOSPITAL<br>BANK OF AMERICA N.A., PO BOX 414876<br>BOSTON, MA 02241-4876                                              | 04-2697983 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT  |
| MASSACHUSETTS GENERAL HOSPITAL<br>BANK OF AMERICA, N.A, PO BOX 414876<br>BOSTON, MA 02241                                                   | 04-2697983 | 501(C)(3)                     | 75,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (CLINICAL)      |
| MASSACHUSETTS GENERAL HOSPITAL<br>ASSEMBLY ROW-PHS CORPORATE<br>OFFICES, 399 REVOLUTION DRIVE -<br>SOMERVILLE, MA 02                        | 04-2697983 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (CLINICAL)      |
| MASSACHUSETTS GENERAL HOSPITAL<br>399 REVOLUTION DRIVE,<br>SOMERVILLE, MA 02145                                                             | 04-2697983 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                   |
| MASSACHUSETTS GENERAL HOSPITAL<br>55 FRUIT STREET, BULFINCH 165<br>BOSTON, MA 02114                                                         | 04-1564655 | 501(C)(3)                     | 9,600.                   | 0.                                |                                                       |                                        | RESIDENT RESEARCH PRECEPTORSHIP             |

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**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
| MASSACHUSETTS GENERAL HOSPITAL<br>55 FRUIT STREET,<br>BOSTON, MA 02114                                                                      | 04-2697983 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD            |
| MASSACHUSETTS GENERAL HOSPITAL<br>55 FRUIT STREET, BULFINCH 165<br>BOSTON, MA 02114                                                         | 04-1564655 | 501(C)(3)                     | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| MASSACHUSETTS GENERAL HOSPITAL-RESEARCH - BANK OF AMERICA, N.A., PO BOX 414876 - BOSTON, MA 02241-4876                                      | 04-2697983 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (BASIC)        |
| MEDICAL UNIVERSITY OF SOUTH CAROLINA - 19 HAGOOD AVENUE, SUITE 606 MSC808, - CHARLESTON, SC 29403                                           | 57-6000722 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| MEDICAL UNIVERSITY OF SOUTH CAROLINA - 19 HAGOOD AVENUE, SUITE 606 MSC808, - CHARLESTON, SC 29403                                           | 57-6000722 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| MEDICAL UNIVERSITY OF SOUTH CAROLINA - 19 HAGOOD AVE. SUITE 606, MSC 808 - CHARLESTON, SC 29403                                             | 57-6000722 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| MEDICAL UNIVERSITY OF SOUTH CAROLINA - 179 ASHELY AVENUE, - CHARLESTON, SC 29425-8908                                                       | 57-6000722 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| MEDICAL UNIVERSITY OF SOUTH CAROLINA - 19 HAGOOD AVE, SUITE 606 - CHARLESTON, SC 29403                                                      | 57-6000722 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| MEDICAL UNIVERSITY OF SOUTH CAROLINA - 19 HAGOOD AVE., SUITE 606, MSC 808 - CHARLESTON, SC 29403-5120                                       | 57-6000722 | GOVT                          | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |

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**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II) |            |                               |                          |                                   |                                                       |                                        |                                             |
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| MEDSTAR WASHINGTON HOSPITAL CENTER<br>110 IRVING STREET, NW, 6A-126<br>WASHINGTON, DC 20010                                                | 52-1272129 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| NEW YORK UNIVERSITY SCHOOL OF MEDICINE - JAMES MARTIN, CONTROLLER, SPONSORED PROGRAMS<br>P.O. BOX 415026 - BOSTON, MA                      | 13-5562308 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| NORTHWESTERN UNIVERSITY<br>ACCOUNTING SERVICES FOR RESEARCH & SPONSORED PROGRAMS, 633 CLARK STREET, CRO                                    | 36-2167817 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                   |
| NORTHWESTERN UNIVERSITY<br>633 CLARK STREET, CROWNE ROOM G-547<br>EVANSTON, IL 60208                                                       | 36-2167817 | 501(C)(3)                     | 15,000.                  | 0.                                |                                                       |                                        | RESIDENT RESEARCH PRECEPTORSHIP             |
| NORTHWESTERN UNIVERSITY FEINBERG SCHOOL OF MEDICINE - 240 E HURON ST., MCGAW PAVILION - DEPARTMENT OF RHEUMATOLOGY - CHICAGO, IL           | 36-2167817 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| NYU SCHOOL OF MEDICINE<br>DIVISION OF RHEUMATOLOGY, ATTN: JAMES DARROW, 301 EAST 17TH STREET, SUITE 14                                     | 13-5562308 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| NYU SCHOOL OF MEDICINE<br>NYU SCHOOL OF MEDICINE - SPONSORED PROGRAMS, PO BOX 415026 - BOSTON, MA 0224                                     | 13-5562308 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL) |
| NYU SCHOOL OF MEDICINE<br>NYU SCHOOL OF MEDICINE SPONSORED PROGRAMS, PO BOX 415026 - BOSTON, MA 02241-                                     | 13-5562308 | 501(C)(3)                     | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (TRANSLATIONAL)          |
| OKLAHOMA MEDICAL RESEARCH FOUNDATION - 825 NE 13TH STREET, - OKLAHOMA CITY, OK 73104                                                       | 73-0580274 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                   |

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**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.) |            |                               |                          |                                   |                                                       |                                        |                                                       |
|---------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-------------------------------------------------------|
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| OREGON HEALTH & SCIENCE UNIVERSITY<br>0690 SW BANCROFT ST., L1060PAM -<br>CASH MANAGEMENT - PORTLAND, OR<br>97239                           | 93-1176109 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                             |
| OREGON HEALTH & SCIENCE UNIVERSITY<br>3181 SW SAM JACKSON RD,<br>PORTLAND, OR 97201                                                         | 93-1176109 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD                       |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA - UCSF CONTROLLER'S OFFICE, 1855 FOLSOM STREET, CGA BOX 0897 SUITE 425 - SAN                        | 94-6036493 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (BASIC)                   |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA - PAYMENT SOLUTIONS AND COMPLIANCE, BOX 957089, 1125 MURPHY HALL, 405 HILGARD - LOS                 | 95-6006143 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL)           |
| REGENTS OF THE UNIVERSITY OF COLORADO - GRANTS AND CONTRACTS, MAIL STOP F428, ANSCHUTZ MEDICAL CAMPUS, BUILDING 500, - AURORA, CO           | 84-6000555 | GOVT                          | 15,000.                  | 0.                                |                                                       |                                        | RESIDENT RESEARCH PRECEPTORSHIP                       |
| REGENTS OF THE UNIVERSITY OF MICHIGAN - 3003 S STATE STREET, - ANN ARBOR, MI 48109                                                          | 38-6006309 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE FUNDING AWARD: K SUPPLEMENT |
| REGENTS OF THE UNIVERSITY OF MICHIGAN - 3003 S STATE STREET, - ANN ARBOR, MI 48109                                                          | 38-6006309 | GOVT                          | 25,000.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE FUNDING AWARD: K SUPPLEMENT |
| REGENTS OF THE UNIVERSITY OF MICHIGAN - 500 S. STATE ST., - ANN ARBOR, MI 48109                                                             | 38-6006309 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD                       |
| RESEARCH FOUNDATION FOR STATE UNIVERSITY OF NEW YORK - PO BOX 9, CASH RECEIPTS DEPARTMENT - ALBANY, NY 12201-0009                           | 14-1368361 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                             |

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**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                          |
| SEATTLE CHILDREN'S HOSPITAL<br>ATTN: BRENDA MAJERCIN, PO BOX 5731<br>SEATTLE, WA 98145                                                     | 91-1156519 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE<br>FUNDING AWARD: K<br>SUPPLEMENT |
| SEATTLE CHILDREN'S HOSPITAL<br>FOUNDATION - ATTN: BRENDA<br>MAJERCIN, PO BOX 5731, MS #S-200 -<br>SEATTLE, WA 98145-5005                   | 91-1156519 | 501(C)(3)                     | 75,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (BASIC)                      |
| STANFORD UNIVERSITY<br>STANFORD UNIVERSITY LOCKBOX, P.O.<br>BOX 44253 - SAN FRANCISCO, CA<br>94144-4253                                    | 94-1156365 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (TRANSLATIONAL)              |
| STANFORD UNIVERSITY<br>STANFORD UNIVERSITY LOCKBOX, P.O.<br>BOX 44253 - SAN FRANCISCO, CA<br>94144-4253                                    | 94-1156365 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD                          |
| SUNY UPSTATE MEDICAL UNIVERSITY<br>750 EAST ADAMS ST.,<br>SYRACUSE, NY 13210                                                               | 14-1368361 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP               |
| SUNY UPSTATE MEDICAL UNIVERSITY<br>750 E ADAMS STREET,<br>SYRACUSE, NY 13210                                                               | 14-1368361 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE<br>STUDENT PRECEPTORSHIP               |
| THE BOARD OF REGENTS OF UNIVERSITY<br>OF WISCONSIN SYSTEM - 21 NORTH<br>PARK ST., STE 6401, - MADISON, WI<br>53715                         | 39-6006492 | 501(C)(3)                     | 99,970.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE<br>FUNDING AWARD: R BRIDGE        |
| THE BOARD OF REGENTS OF UNIVERSITY<br>OF WISCONSIN SYSTEM - ATTN: KIM<br>MORELAND, UNIV OF<br>WISCONSIN-MADISON, 21 NORTH PARK             | 39-6006492 | 501(C)(3)                     | 49,985.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE<br>FUNDING AWARD: R BRIDGE        |
| THE CHILDREN'S HOSPITAL OF<br>PHILADELPHIA - OFFICE OF SPONSORED<br>RESEARCH, 3615 CIVIC CENTER BLVD.<br>ARC 142D - PHILADELPHIA, PA 19104 | 23-1352166 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (BASIC)                      |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance         |
|----------------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|--------------------------------------------|
| THE CHILDREN'S HOSPITAL OF PHILADELPHIA - 3615 CIVIC CENTER BLVD, ARC 142, - PHILADELPHIA, PA 19104-4318                         | 23-1352166 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | PAULA DE MERIEUX FELLOWSHIP TRAINING AWARD |
| THE OHIO STATE UNIVERSITY WEXNER MEDICAL CENTER - 480 MEDICAL CENTER DRIVE, ROOM S2056, - COLUMBUS, OH 43210                     | 31-6025986 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| THE OHIO STATE UNIVERSITY WEXNER MEDICAL CENTER - 480 MEDICAL CENTER DRIVE, DAVIS BUILDING UIITE 2056 - COLUMBUS, OH 43201       | 31-6025986 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA - UCSF CONTROLLERS OFFICE, 1855 FOLSOM STREET, SUITE 425, CONTRACTS & GRANTS - SAN   | 94-6036493 | GOVT                          | 75,000.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE FUNDING AWARD    |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA - UCLA PAYMENT SOLUTIONS AND COMPLIANCE, BOX 957089, 1125 MURPHY HALL - LOS          | 95-6006143 | GOVT                          | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA - 1855 FOLSOM STREET, SUITE 425, - SAN FRANCISCO, CA 94143-0815                      | 94-6036493 | GOVT                          | 125,000.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (BASIC)                 |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA - CONTROLLER'S OFFICE, 1855 FOLSOM STREET, SUITE 425, CONTRACTS & GRANTS ACCOU - SAN | 94-6036493 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD            |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, UCSF CONTROLLER'S OFFICE - 1855 FOLSOM STREET, SUITE 425, 1855 FOLSOM STREET, SUITE | 94-6036493 | GOVT                          | 74,998.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (BASIC)        |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, SAN DIEGO - UCSD CASHIER'S OFFICE, 9500 GILMAN DRIVE, MC 0009 - LA JOLLA, CA        | 95-6006144 | GOVT                          | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                  |

Schedule I (Form 990)

**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance          |
| THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, UNIVERSITY OF CALIFORNIA, SAN DIEGO - UCSD CASHIERS OFFICE, 9500 GILMAN                        | 95-6006144 | GOVT                          | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT  |
| THE RESEARCH FOUNDATION FOR SUNY ON BEHALF OF THE UNIVERSITY AT BUFFALO - THE UB COMMONS, 520 LEE ENTRANCE, SUITE 211, - AMHERST, NY        | 14-1368361 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| THE RESEARCH FOUNDATION FOR SUNY ON BEHALF OF THE UNIVERSITY AT BUFFALO - THE UB COMMONS, 520 LEE ENTRANCE, SUITE 211 - AMHERST, NY         | 14-1368361 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| THE RESEARCH FOUNDATION FOR SUNY ON BEHALF OF THE UNIVERSITY AT BUFFALO - THE UB COMMONS, 520 LEE ENTRANCE, SUITE 211 - AMHERST, NY         | 14-1368361 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| THE RESEARCH INSTITUTE AT NATIONWIDE CHILDREN'S HOSPITAL - P.O. BOX 781653, - DETROIT, MI 48278-1653                                        | 31-6056230 | 501(C)(3)                     | 62,485.                  | 0.                                |                                                       |                                        | INVESTIGATOR AWARD (CLINICAL)               |
| THE ROCKEFELLER UNIVERSITY 1230 YORK AVENUE, NEW YORK, NY 10065                                                                             | 13-1624158 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL) |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA, LOS ANGELES - 1000 VETERAN AVE, REHAB ROOM 32-59 - LOS ANGELES, CA 90095                           | 95-6006143 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| THE UNIVERSITY OF CHICAGO ATTN: NANCY GORMLEY, DIRECTOR, GIFT ADMINISTRATION AND BUSINESS DATA, 5235 S                                      | 36-2177139 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL - ATTN: BANK OF AMERICA LOOKBOX SERVICES, PO BOX 402420 - ATLANTA, GA 30384-2420            | 56-6001393 | GOVT                          | 200,000.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                   |

Schedule I (Form 990)



**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance             |
| THE UNIVERSITY OF NORTH CAROLINA<br>AT CHAPEL HILL - OFFICE OF<br>SPONSORED RESEARCH, 104 AIRPORT<br>DRIVE, SUITE 2200, CB# 1350 -          | 56-6001393 | GOVT                          | 60,000.                  | 0.                                |                                                       |                                        | CLINICIAN SCHOLAR<br>EDUCATOR                  |
| THE UNIVERSITY OF TEXAS MD<br>ANDERSON CANCER CENTER - THE<br>UNIVERSITY OF TEXAS MD ANDERSON<br>CANCER CENTER, ATTN: GRANTS AND            | 74-6001118 | GOVT                          | 124,911.                 | 0.                                |                                                       |                                        | INVESTIGATOR AWARD<br>(TRANSLATIONAL)          |
| TRUSTEES OF THE UNIVERSITY OF<br>PENNSYLVANIA - 3451 WALNUT STREET,<br>- PHILADELPHIA, PA 19104-6205                                        | 23-1352685 | 501(C)(3)                     | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH<br>INNOVATIVE GRANT  |
| TRUSTEES OF THE UNIVERSITY OF<br>PENNSYLVANIA - 3451 WALNUT STREET,<br>P221 FRANKLIN BUILDING -<br>PHILADELPHIA, PA 19104-6205              | 23-1352685 | 501(C)(3)                     | 75,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (CLINICAL)      |
| TRUSTEES OF THE UNIVERSITY OF<br>PENNSYLVANIA - OFFICE OF RESEARCH<br>SERVICES, 3451 WALNUT STREET, ROOM<br>P-221 - PHILADELPHIA, PA        | 23-1352685 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD             |
| TUFTS MEDICAL CENTER<br>800 WASHINGTON STREET,<br>BOSTON, MA 02111                                                                          | 04-3400617 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (TRANSLATIONAL) |
| TUFTS MEDICAL CENTER<br>3 EMERSON RD,<br>WESTFORD, MA 01886                                                                                 | 04-3400617 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (TRANSLATIONAL) |
| TUFTS MEDICAL CENTER<br>800 WASHINGTON STREET,<br>BOSTON, MA 02111                                                                          | 04-3400617 | 501(C)(3)                     | 1,612.                   | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT<br>AWARD (TRANSLATIONAL) |
| TUFTS MEDICAL CENTER, INC<br>800 WASHINGTON STREET, RESEARCH<br>ADMINISTRATION TUFTS MC BOX 817 -<br>BOSTON, MA                             | 04-3400617 | 501(C)(3)                     | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING<br>AWARD             |

Schedule I (Form 990)

RHEUMATOLOGY RESEARCH FOUNDATION

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance          |
| UNIVERSITY OF CALIFORNIA, SAN FRANCISCO SCHOOL OF MEDICINE - 1855 FOLSOM ST. STE 425 BOX 0897, - SAN FRANCISCO, CA 94143                    | 94-6036493 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| UNIVERSITY OF ALABAMA AT BIRMINGHAM - ATTN: RHEUMATOLOGY FINANCE, 1720 2ND AVENUE SOUTH, SHEL 176 - BIRMINGHAM, AL                          | 63-6005396 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| UNIVERSITY OF ARKANSAS FOR MEDICAL SCIENCES - ATTN: ANITA REEVES, TREASURER'S OFFICE, 4031 W MARKHAM, #560 - LITTLE ROCK, AR                | 71-6046242 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD             |
| UNIVERSITY OF CALIFORNIA, DAVIS - CASHIER & PAYMENT SOLUTIONS OFFICE - PO BOX 989062, - SACRAMENTO, CA 95798-9062                           | 94-6036494 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| UNIVERSITY OF CALIFORNIA, SAN FRANCISCO SCHOOL OF MEDICINE - 1855 FOLSOM ST. STE 425 BOX 0897, - SAN FRANCISCO, CA 94143                    | 94-6036493 | GOVT                          | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| UNIVERSITY OF CENTRAL FLORIDA COLLEGE OF MEDICINE - 12424 RESEARCH PARKWAY, SUITE 300, - ORLANDO, FL 32826                                  | 59-2924021 | GOVT                          | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| UNIVERSITY OF COLORADO DENVER GRANTS AND CONTRACTS [160244 - LK], PO BOX 910238 - DENVER, CO 80291-0238                                     | 84-6000555 | GOVT                          | 75,000.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (TRANSLATIONAL) |
| UNIVERSITY OF COLORADO DENVER GRANTS AND CONTRACT, PO BOX 910238, DENVER, CO 80291                                                          | 84-6000555 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |
| UNIVERSITY OF COLORADO DENVER 13001 E. 17TH PLACE, ROOM W1124, GRANTS AND CONTRACTS, MAIL STOP F428, ANSCH                                  | 84-6000555 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP  |

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                    |
|------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|-------------------------------------------------------|
| UNIVERSITY OF COLORADO SCHOOL OF MEDICINE - ANSCHUTZ MED CAMPUS, BLDG 500 13001 E 17TH PL RM W1124, - AURORA, CO 80045 | 84-6000555 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP            |
| UNIVERSITY OF COLORADO, DENVER 13001 E. 17TH PLACE, ROOM W1124, GRANTS AND CONTRACTS, MAIL STOP F428, ANSCH            | 84-6000555 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE FUNDING AWARD: K SUPPLEMENT |
| UNIVERSITY OF DELAWARE 540 S. COLLEGE AVE, SUITE 210, NEWARK, DE 19713                                                 | 51-6000297 | GOVT                          | 12,000.                  | 0.                                |                                                       |                                        | LAWREN H. DALTROY HEALTH PROFESSIONAL PRECEPTORSHIP   |
| UNIVERSITY OF DELAWARE 540 S. COLLEGE AVE, SUITE 210, NEWARK, DE 19713                                                 | 51-6000297 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP            |
| UNIVERSITY OF DELAWARE 540 S. COLLEGE AVE, SUITE 210, NEWARK, DE 19713                                                 | 51-6000297 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP            |
| UNIVERSITY OF DELAWARE 540 S. COLLEGE AVE 210L, NEWARK, DE 19713                                                       | 51-6000297 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP            |
| UNIVERSITY OF KANSAS MEDICAL CENTER - 3901 RAINBOW BLVD. MS 1039, - KANSAS CITY, KS 66160                              | 48-1108830 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP            |
| UNIVERSITY OF MARYLAND, BALTIMORE P.O. BOX 41428, BALTIMORE, MD 21203-6428                                             | 52-6002033 | GOVT                          | 43,328.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (CLINICAL)                |
| UNIVERSITY OF MIAMI 1320 SOUTH DIXIE HIGHWAY, GABLES ONE TOWER, 6TH FLOOR - CORAL GABLES, FL 331                       | 59-0624458 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD                       |

Schedule I (Form 990)

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                |
| UNIVERSITY OF NEBRASKA MEDICAL CENTER - 985100 NEBRASKA MEDICAL CENTER, - OMAHA, NE 68198                                                   | 47-0049123 | GOVT                          | 50,000.                  | 0.                                |                                                       |                                        | AMGEN FELLOWSHIP TRAINING AWARD                   |
| UNIVERSITY OF NEW MEXICO MSC09 5520, 1 UNIVERSITY OF NEW MEXICO ALBUQUERQUE, NM 87120                                                       | 85-6000642 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP        |
| UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL - BOFA LOCKBOX SVCS PO BOX 402420, - ATLANTA, GA 30384-2420                                     | 56-6001393 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP        |
| UNIVERSITY OF OKLAHOMA HEALTH SCIENCES CENTER - 1000 STANTON L. YOUNG BLVD., - OKLAHOMA CITY, OK 73117                                      | 73-1563627 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP        |
| UNIVERSITY OF PITTSBURGH RESEARCH/COST ACCOUNTING, PO BOX 37 PITTSBURGH, PA 15251-7220                                                      | 25-0965591 | GOVT                          | 200,000.                 | 0.                                |                                                       |                                        | DISEASE TARGETED RESEARCH INNOVATIVE GRANT        |
| UNIVERSITY OF ROCHESTER 518 Hylan Building, ROCHESTER, NY 14627-0140                                                                        | 16-0743209 | GOVT                          | 60,000.                  | 0.                                |                                                       |                                        | CLINICIAN SCHOLAR EDUCATOR                        |
| UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER - PO BOX 841753, - DALLAS, TX 75284-1753                                                    | 75-6002868 | GOVT                          | 100,000.                 | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE FUNDING AWARD: R BRIDGE |
| UNIVERSITY OF VERMONT 111 COCHESTER AVE, BURLINGTON, VT 05401                                                                               | 03-0219309 | GOVT                          | 500.                     | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP        |
| UNIVERSITY OF VERMONT MEDICAL CENTER - 111 COLCHESTER AVE., - BURLINGTON, VT 05401                                                          | 03-0219309 | GOVT                          | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP        |

Schedule I (Form 990)

**RHEUMATOLOGY RESEARCH FOUNDATION**

| Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance                          |
| VANDERBILT UNIVERSITY MEDICAL CENTER - FINANCIAL MANAGEMENT-D, CLINTON BROWN, DEPT 1236, PO BOX 121236, - DALLAS, TX 75312                  | 35-2528741 | 501(C)(3)                     | 15,000.                  | 0.                                |                                                       |                                        | EPHRAIM P. ENGLEMAN ENDOWED RESIDENT RESEARCH PRECEPTORSHIP |
| VANDERBILT UNIVERSITY MEDICAL CENTER - DEPT. 1236 POB 121236, - DALLAS, TX 75312-1236                                                       | 35-2528741 | 501(C)(3)                     | 100,000.                 | 0.                                |                                                       |                                        | CAREER DEVELOPMENT BRIDGE FUNDING AWARD; R BRIDGE           |
| WASHINGTON STATE UNIVERSITY PO BOX 1495, SPOKANE, WA 99210                                                                                  | 91-6001108 | 501(C)(3)                     | 1,000.                   | 0.                                |                                                       |                                        | MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP                  |
| WASHINGTON UNIVERSITY 700 ROSEDALE AVE, CAMPUS BOX 1034 ST. LOUIS, MO 63112-1408                                                            | 43-0653611 | 501(C)(3)                     | 24,909.                  | 0.                                |                                                       |                                        | SCIENTIST DEVELOPMENT AWARD (BASIC)                         |
| YALE UNIVERSITY, OFFICE OF SPONSORED PROJECTS - YALE UNIVERSITY - NEW HAVEN, CT 06508-1873                                                  | 06-0646973 | 501(C)(3)                     | 192,523.                 | 0.                                |                                                       |                                        | INNOVATIVE RESEARCH AWARD                                   |
|                                                                                                                                             |            |                               |                          |                                   |                                                       |                                        |                                                             |
|                                                                                                                                             |            |                               |                          |                                   |                                                       |                                        |                                                             |
|                                                                                                                                             |            |                               |                          |                                   |                                                       |                                        |                                                             |
|                                                                                                                                             |            |                               |                          |                                   |                                                       |                                        |                                                             |
|                                                                                                                                             |            |                               |                          |                                   |                                                       |                                        |                                                             |

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                                        |
|-------------------------------------------------------|--------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|------------------------------------------------------------------------------|
| ACR EXCELLENCE IN INVESTIGATIVE MENTORING AWARD       | 1                        | 3,000.                   | 0.                                |                                                       | THROUGH THE ACR EXCELLENCE IN INVESTIGATIVE MENTORING AWARD, THE FOUNDATION  |
| EDMUND L. DUBOIS, MD MEMORIAL LECTURESHIP             | 1                        | 2,500.                   | 0.                                |                                                       | THE FOUNDATION MEMORIAL LECTURESHIPS WERE ESTABLISHED THROUGH THE GENEROSITY |
| HEALTH PROFESSIONAL ONLINE EDUCATION GRANT            | 6                        | 12,250.                  | 0.                                |                                                       | THE PURPOSE OF THIS AWARD IS TO INCREASE THE KNOWLEDGE AND SKILLS OF RHEUMAT |
| HENCH LECTURE                                         | 1                        | 3,000.                   | 0.                                |                                                       | THIS LECTURESHIP WAS ORIGINALLY ESTABLISHED BY THE HENCH SOCIETY AT THE MAYO |
| MARSHALL J. SCHIFF, MD MEMORIAL FELLOW RESEARCH AWARD | 2                        | 2,250.                   | 0.                                |                                                       | THE PURPOSE OF THE MARSHALL J. SCHIFF, MD, MEMORIAL FELLOW RESEARCH AWARD RE |

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:

THE RHEUMATOLOGY RESEARCH FOUNDATION MAINTAINS AN EXTENSIVE AWARDS AND GRANTS PORTFOLIO, WITH OVER 30 SUPPORT MECHANISMS FOR RHEUMATOLOGISTS AND RHEUMATOLOGY HEALTH PROFESSIONALS IN THE US. EACH GRANT APPLICATION CONTAINS VERY SPECIFIC ELIGIBILITY AND REVIEW CRITERIA (DETAILS REGARDING THESE REQUIREMENTS ARE AVAILABLE AT WWW.RHEUMRESEARCH.ORG. ALL APPLICATIONS UNDERGO RIGOROUS PEER REVIEW IN THEIR ASSIGNED STUDY SECTION, AND ARE SCORED AND RANKED ACCORDING TO THE REVIEW CRITERIA AND OVERALL MERIT OF THE PROPOSAL. ALL STUDY SECTION RECOMMENDATIONS ARE SENT TO THE FOUNDATION'S

| Part III Continuation of Grants and Other Assistance to Individuals in the United States (Schedule I (Form 990), Part III.) |                          |                          |                                   |                                                       |                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|-------------------------------------------------------------------------------|
| (a) Type of grant or assistance                                                                                             | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of non-cash assistance                                        |
| MEDICAL AND GRADUATE STUDENT PRECEPTORSHIP                                                                                  | 45.                      | 84,550.                  | 0.                                |                                                       | THE PURPOSE OF THE PRECEPTORSHIP PROGRAM IS TO INTRODUCE MEDICAL AND GRADUATE |
| MEDICAL AND PEDIATRIC RESIDENT RESEARCH AWARD                                                                               | 6.                       | 8,000.                   | 0.                                |                                                       | THIS AWARD MOTIVATES OUTSTANDING RESIDENTS TO PURSUE SUBSPECIALTY TRAINING I  |
| MEMORIAL LECTURESHP: DR. EPHRAIM P. ENGLEMAN                                                                                | 1.                       | 3,000.                   | 0.                                |                                                       | THIS LECTURESHP WAS ESTABLISHED BY THE RHEUMATOLOGY RESEARCH FOUNDATION AND   |
| OSCAR S. GLUCK, MD MEMORIAL LECTURESHP                                                                                      | 1.                       | 1,500.                   | 0.                                |                                                       | THE FOUNDATION MEMORIAL LECTURESHPS WERE ESTABLISHED THROUGH THE GENEROSITY   |
| PEDIATRIC RESEARCH AWARD                                                                                                    | 2.                       | 6,000.                   | 0.                                |                                                       | THIS AWARD RECOGNIZES AND PROMOTES SCHOLARSHIP IN THE FIELD OF PEDIATRIC RHE  |
| PEDIATRIC VISITING PROFESSORSHIP                                                                                            | 4.                       | 6,000.                   | 0.                                |                                                       | THE PURPOSE OF THE PEDIATRIC VISITING PROFESSORSHIP AWARD IS TO PROVIDE AN E  |
| PRESIDENTIAL GOLD MEDAL                                                                                                     | 1.                       | 1,125.                   | 0.                                |                                                       | THE HIGHEST AWARD THAT THE ACR CAN BESTOW, THE PRESIDENTIAL GOLD MEDAL IS AW  |
| STUDENT ACHIEVEMENT AWARD                                                                                                   | 9.                       | 18,650.                  | 0.                                |                                                       | THIS AWARD RECOGNIZES OUTSTANDING MEDICAL AND GRADUATE STUDENTS FOR SIGNIFIC  |
| STUDENT AND RESIDENT ACR/ARHP ANNUAL MEETING SCHOLARSHIP                                                                    | 32.                      | 66,250.                  | 0.                                |                                                       | THE PURPOSE OF STUDENT AND RESIDENT ACR/ARHP ANNUAL MEETING SCHOLARSHIP IS T  |

Schedule I (Form 990)



**Part IV** Supplemental Information

SCIENTIFIC ADVISORY COUNCIL FOR QUALIFICATION BEFORE BEING PRESENTED (BLINDED) TO THE FOUNDATION BOARD OF DIRECTORS FOR FINAL APPROVAL. AFTER THE AWARDS ARE MADE, ALL RECIPIENTS ARE REQUIRED TO COMPLETE FUNDING CONTRACTS WITH INSTITUTIONAL SIGN-OFF, AND MUST ALSO SUBMIT ANNUAL REPORTS ON THEIR PROGRESS, INCLUDING FINANCIAL RECONCILIATION AND ASSURANCE OF COMPLIANCE WITH FOUNDATION POLICIES (AVAILABLE ON THE WEBSITE). ALL REPORTS ARE REVIEWED BY THE FOUNDATION'S SCIENTIFIC ADVISORY COUNCIL TO ENSURE COMPLIANCE WITH PROGRAMMATIC, SCIENTIFIC, AND FISCAL AND ADMINISTRATIVE POLICES AND REQUIREMENTS. IF A RECIPIENT IS FOUND TO BE IN COMPLIANCE AND MAKING REASONABLE PROGRESS (I.E., MEETING PROJECT BENCHMARKS), THE NEXT YEAR OF FUNDING IS APPROVED FOR DISBURSEMENT. IF NOT, THE AWARD MAY BE TERMINATED. SUCH PROGRAMMATIC OVERSIGHT ALLOWS FOR EXCELLENT STEWARDSHIP OF FOUNDATION FUNDS. IN ADDITION TO REGULAR OVERSIGHT AS DESCRIBED ABOVE, PORTFOLIO REVIEWS ARE CONDUCTED EVERY FIVE YEARS TO ENSURE THAT FUNDING MECHANISMS ARE EFFECTIVELY MEETING THE FOUNDATION'S GOALS OUTLINED IN THE STRATEGIC PLAN.

IN ADDITION, THE RHEUMATOLOGY RESEARCH FOUNDATION ABIDES BY THE FOLLOWING CONFLICT OF INTEREST GUIDELINES: GUIDELINES FOR AWARDING OF FOUNDATION AWARDS AND GRANTS

- I. THE COLLEGE WILL NOT PERMIT ANY EXTERNAL ENTITIES TO SELECT (OR INFLUENCE THE SELECTION OF) RECIPIENTS OF FOUNDATION AWARDS OR GRANTS.
- II. THE COLLEGE WILL APPOINT INDEPENDENT COMMITTEES TO SELECT RECIPIENTS OF FOUNDATION AWARDS OR GRANTS BASED ON PEER REVIEW OF GRANT APPLICATIONS.
- III. THE COLLEGE WILL NOT REQUIRE RECIPIENTS OF FOUNDATION AWARDS OR GRANTS TO MEET WITH EXTERNAL ENTITIES.
- IV. THE COLLEGE WILL NOT PERMIT ANY EXTERNAL ENTITY THAT SUPPORTS

|                |                                 |
|----------------|---------------------------------|
| <b>Part IV</b> | <b>Supplemental Information</b> |
|----------------|---------------------------------|

FOUNDATION AWARDS OR GRANTS TO REQUIRE INTELLECTUAL PROPERTY RIGHTS OR ROYALTIES ARISING OUT OF THE GRANT-FUNDED RESEARCH.

V. THE COLLEGE WILL NOT PERMIT ANY EXTERNAL ENTITY THAT SUPPORTS FOUNDATION AWARDS OR GRANTS TO CONTROL OR INFLUENCE MANUSCRIPTS THAT ARISE FROM THE GRANT-FUNDED RESEARCH.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest  
Compensated Employees

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2017**

Open to Public  
Inspection

Name of the organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

Employer identification number

**58-1654301**

**Part I Questions Regarding Compensation**

**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

☒ Travel for companions

☐ Tax indemnification and gross-up payments

☐ Discretionary spending account

☐ Housing allowance or residence for personal use

☐ Payments for business use of personal residence

☐ Health or social club dues or initiation fees

☐ 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

**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?

**3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

☐ Compensation committee

☒ Independent compensation consultant

☒ Form 990 of other organizations

☐ Written employment contract

☒ Compensation survey or study

☐ 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?

**b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?

**c** Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**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?

**b** Any related organization?

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?

**b** Any related organization?

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

**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

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

|           |  |   |
|-----------|--|---|
|           |  |   |
| <b>1b</b> |  | X |
| <b>2</b>  |  | X |
|           |  |   |
| <b>4a</b> |  | X |
| <b>4b</b> |  | X |
| <b>4c</b> |  | X |
|           |  |   |
| <b>5a</b> |  | X |
| <b>5b</b> |  | X |
|           |  |   |
| <b>6a</b> |  | X |
| <b>6b</b> |  | X |
|           |  |   |
| <b>7</b>  |  | X |
| <b>8</b>  |  | X |
| <b>9</b>  |  |   |



**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:**

PARTNER OR SIGNIFICANT OTHER TRAVEL COSTS ARE REIMBURSED FOR EXECUTIVE

COMMITTEE MEMBERS ONLY, UNDER THE FOLLOWING CIRCUMSTANCES: TRAVEL COVERED

FOR UP TO 3 MEETINGS PER YEAR, INCLUDING ONE INTERNATIONAL TRIP, TO BE USED

ANYTIME DURING THE OFFICIAL YEAR. FOR THE INTERNATIONAL MEETING PARTNER OR

SIGNIFICANT OTHERS MAY TRAVEL BUSINESS CLASS.

**SCHEDULE M**  
**(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2017**

**Open To Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

- ▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**  
▶ **Attach to Form 990.**  
▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

Name of the organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

Employer identification number

**58-1654301**

**Part I** **Types of Property**

|                                                                       | (a)<br>Check if<br>applicable | (b)<br>Number of<br>contributions or<br>items contributed | (c)<br>Noncash contribution<br>amounts reported on<br>Form 990, Part VIII, line 1g | (d)<br>Method of determining<br>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 .....                                  | <b>X</b>                      | <b>6</b>                                                  | <b>148,414</b>                                                                     | <b>FMV</b>                                                   |
| 10 Securities - Closely held stock .....                              |                               |                                                           |                                                                                    |                                                              |
| 11 Securities - Partnership, LLC, or<br>trust interests .....         |                               |                                                           |                                                                                    |                                                              |
| 12 Securities - Miscellaneous .....                                   |                               |                                                           |                                                                                    |                                                              |
| 13 Qualified conservation contribution -<br>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 ▶ ( .....                                                    |                               |                                                           |                                                                                    |                                                              |
| 26 Other ▶ ( .....                                                    |                               |                                                           |                                                                                    |                                                              |
| 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 IV, Donee Acknowledgement .....

**29**

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 three years from the date of the initial contribution, and which isn't required to be used for  
exempt purposes for the entire holding period? .....

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? .....

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash  
contributions? .....

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.

|     | Yes      | No       |
|-----|----------|----------|
| 30a |          | <b>X</b> |
| 31  | <b>X</b> |          |
| 32a |          | <b>X</b> |
| 33  |          |          |

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

Schedule M (Form 990) 2017

## 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.

[illegible]



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

Department of the Treasury  
Internal Revenue Service

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

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

▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2017**

Open to Public  
Inspection

Name of the organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

Employer identification number  
**58-1654301**

**FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:**

THE FOUNDATION IS A 501(C)(3) CHARITABLE ORGANIZATION DEDICATED TO  
ADVANCING TREATMENT FOR PEOPLE LIVING WITH RHEUMATIC DISEASE, AND IS  
THE LARGEST PRIVATE FUNDING SOURCE OF RHEUMATOLOGY RESEARCH AND  
TRAINING IN THE UNITED STATES. ON AVERAGE, 84 CENTS OF EVERY DOLLAR  
DONATED IS USED TO SUPPORT ITS AWARDS AND GRANTS PROGRAM. THIS  
STATISTIC IS BASED ON A FIVE-YEAR ROLLING AVERAGE OF PROGRAM EXPENSES  
VS. ADMINISTRATIVE EXPENSES. FOR THE PAST FIVE YEARS (2014-2018), THE  
AVERAGE IS 83.71% OF EXPENSES TO SUPPORT PROGRAMS AND 16.29% OF  
EXPENSES TO SUPPORT ADMINISTRATIVE AND FUNDRAISING COSTS. THE  
ORGANIZATION HAS RECEIVED A 4-STAR RATING, THE HIGHEST OFFERED BY  
CHARITY NAVIGATOR, FOR TEN CONSECUTIVE YEARS BASED ON GOOD GOVERNANCE,  
SOUND FISCAL MANAGEMENT, AND COMMITMENT TO ACCOUNTABILITY AND  
TRANSPARENCY. THE ORGANIZATION HAS COMMITTED OVER \$161M DIRECTLY TO  
RESEARCH AND TRAINING SINCE IT WAS FOUNDED IN 1985 BY THE GRANTING OF  
3,315 INDIVIDUAL AWARDS.

**FORM 990, PART V, LINE 2A**

**EXPLANATION OF FULL TIME EMPLOYEES:**

THE FILING ORGANIZATION HAS A MANAGEMENT CONTRACT WITH RELATED  
ORGANIZATION, AMERICAN COLLEGE OF RHEUMATOLOGY (ACR), UNDER WHICH ACR  
PROVIDES EMPLOYEES WHO PERFORM SERVICES FOR THE ORGANIZATION. THE  
ORGANIZATION PAYS A MANAGEMENT FEE TO ACR WHICH INCLUDES SALARIES  
EXPENSE FOR THE EMPLOYEES THAT PROVIDED SERVICES FOR THE YEAR. DURING  
THE YEAR THERE WERE APPROXIMATELY 20 FULL TIME EMPLOYEES WHO PROVIDED

Name of the organization

RHEUMATOLOGY RESEARCH FOUNDATION

Employer identification number

58-1654301

SERVICES FOR THE ORGANIZATION.

FORM 990, PART VI, SECTION A, LINE 3:

THE AMERICAN COLLEGE OF RHEUMATOLOGY PROVIDES MANAGEMENT AND ADMINISTRATIVE SERVICES FOR THE FOUNDATION. MANAGEMENT FEES CHARGED TO THE FOUNDATION BY THE COLLEGE AMOUNTED TO \$2,454,080 FOR THE FISCAL YEAR ENDING JUNE 30, 2018 AND ARE INCLUDED IN MANAGEMENT FEES IN THE ACCOMPANYING STATEMENTS OF FUNCTIONAL EXPENSES.

FORM 990, PART VI, SECTION A, LINE 4:

THE ORGANIZATION MADE CHANGES TO ITS BYLAWS WHICH IMPACTED CERTAIN COMMITTEES OF THE ORGANIZATION.

FORM 990, PART VI, SECTION A, LINE 7A:

THE BOARD OF DIRECTORS OF THE FOUNDATION SHALL BE NOMINATED BY THE ACR COMMITTEE ON NOMINATIONS AND APPOINTMENTS AND CONFIRMED BY THE BOARD OF DIRECTORS OF THE FOUNDATION.

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

A DRAFT COPY OF THE FORM 990 WAS PROVIDED TO THE FULL BOARD FOR THEIR REVIEW AND COMMENT PRIOR TO FILING OF THE RETURN. THE QUESTION AND ANSWER PERIOD OF THE MEETING WAS HELD WITH ASSISTANCE FROM THE VICE PRESIDENT, OPERATIONS AND FINANCE, AND THE TAX PREPARER AND WAS DOCUMENTED IN THE MINUTES. THE EXECUTIVE DIRECTOR SIGNED THE RETURN AFTER CONSIDERING COMMENTS.

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

Name of the organization

RHEUMATOLOGY RESEARCH FOUNDATION

Employer identification number

58-1654301

ALL BOARD MEMBERS ANNUAL SUBMISSION OF DISCLOSURE STATEMENTS ARE ON FILE WITH LEGAL COUNSEL. ANY INDIVIDUAL WHO GIVES NOTICE OF POTENTIAL CONFLICT IS TO ABSTAIN FROM PARTICIPATING IN ANY ITEM OF BUSINESS WHICH COMES BEFORE THE BOARD.

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

THE RHEUMATOLOGY RESEARCH FOUNDATION HAS A MANAGEMENT AGREEMENT WITH AMERICAN COLLEGE OF RHEUMATOLOGY. AMERICAN COLLEGE OF RHEUMATOLOGY'S POLICIES APPLY TO THE FOUNDATION. THE EXECUTIVE DIRECTOR AND DIRECTOR OF HUMAN RESOURCES USES COMPARABILITY DATA TO DEVELOP COMPENSATION RANGES AND TARGETS. THE DIRECTOR OF HUMAN RESOURCES CONTEMPORANEOUSLY DOCUMENTS AND MAINTAINS CONFIDENTIAL RECORDS OF ALL DECISIONS AFFECTING COLLEGE AND FOUNDATION EMPLOYEES.

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

THE ORGANIZATION MAKES IT GOVERNING DOCUMENTS AND CONFLICT OF INTEREST POLICY AVAILABLE TO THE PUBLIC UPON REQUEST. THE ORGANIZATION MAKES ITS FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST AND ON THE ORGANIZATION'S WEBSITE.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

|                                 |          |
|---------------------------------|----------|
| RECOVERIES OF PRIOR YEAR GRANTS | 188,107. |
|---------------------------------|----------|

FORM 990, PART XII, LINE 2C:

THIS PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR.

**SCHEDULE R  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.  
▶ Attach to Form 990.

Name of the organization

**RHEUMATOLOGY RESEARCH FOUNDATION**

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Employer identification number  
**58-1654301**

OMB No. 1545-0047

**2017**

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**Part I**

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

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

**Part II**

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

| (a)<br>Name, address, and EIN<br>of related organization                                             | (b)<br>Primary activity                                           | (c)<br>Legal domicile (state or<br>foreign country) | (d)<br>Exempt Code<br>section | (e)<br>Public charity<br>status (if section<br>501(c)(3)) | (f)<br>Direct controlling<br>entity | (g)<br>Section 512(b)(13)<br>controlled<br>entity? |    |
|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------|-------------------------------|-----------------------------------------------------------|-------------------------------------|----------------------------------------------------|----|
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     | Yes                                                | No |
| AMERICAN COLLEGE OF RHEUMATOLOGY, INC. -<br>58-1627547, 2200 LAKE BOULEVARD NE, ATLANTA,<br>GA 30319 | PROVIDES EDUCATION,<br>RESEARCH, ADVOCACY AND<br>PRACTICE SUPPORT | ILLINOIS                                            | 501(C)(6)                     |                                                           | N/A                                 |                                                    | X  |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |
|                                                                                                      |                                                                   |                                                     |                               |                                                           |                                     |                                                    |    |

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

Schedule R (Form 990) 2017

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

[illegible]

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

[illegible]

**Part V** Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

|                                                                                                          | Yes | No |
|----------------------------------------------------------------------------------------------------------|-----|----|
| <b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity |     | X  |
| <b>b</b> Gift, grant, or capital contribution to related organization(s)                                 | X   |    |
| <b>c</b> Gift, grant, or capital contribution from related organization(s)                               | X   |    |
| <b>d</b> Loans or loan guarantees to or for related organization(s)                                      |     | X  |
| <b>e</b> Loans or loan guarantees by related organization(s)                                             |     | X  |
| <b>f</b> Dividends from related organization(s)                                                          |     |    |
| <b>g</b> Sale of assets to related organization(s)                                                       |     | X  |
| <b>h</b> Purchase of assets from related organization(s)                                                 |     | X  |
| <b>i</b> Exchange of assets with related organization(s)                                                 |     | X  |
| <b>j</b> Lease of facilities, equipment, or other assets to related organization(s)                      |     | X  |
| <b>k</b> Lease of facilities, equipment, or other assets from related organization(s)                    |     |    |
| <b>l</b> Performance of services or membership or fundraising solicitations for related organization(s)  | X   |    |
| <b>m</b> Performance of services or membership or fundraising solicitations by related organization(s)   | X   |    |
| <b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)   | X   |    |
| <b>o</b> Sharing of paid employees with related organization(s)                                          | X   |    |
| <b>p</b> Reimbursement paid to related organization(s) for expenses                                      |     |    |
| <b>q</b> Reimbursement paid by related organization(s) for expenses                                      |     |    |
| <b>r</b> Other transfer of cash or property to related organization(s)                                   |     |    |
| <b>s</b> Other transfer of cash or property from related organization(s)                                 |     |    |

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

|     | (a)<br>Name of related organization | (b)<br>Transaction type (a-s) | (c)<br>Amount involved | (d)<br>Method of determining amount involved |
|-----|-------------------------------------|-------------------------------|------------------------|----------------------------------------------|
| (1) | AMERICAN COLLEGE OF RHEUMATOLOGY    | M                             | 2,454,080. CASH        |                                              |
| (2) | AMERICAN COLLEGE OF RHEUMATOLOGY    | C                             | 350,000. CASH          |                                              |
| (3) |                                     |                               |                        |                                              |
| (4) |                                     |                               |                        |                                              |
| (5) |                                     |                               |                        |                                              |
| (6) |                                     |                               |                        |                                              |



|                 |                                  |
|-----------------|----------------------------------|
| <b>Part VII</b> | <b>Supplemental Information.</b> |
|-----------------|----------------------------------|

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

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