

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

2010

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2010 calendar year, or tax year beginning 7/01, 2010, and ending 6/30, 2011

B Check if applicable:
 Address change
 Name change
 Initial return
 Terminated
 Amended return
 Application pending

D Employer Identification Number: 94-1747036

E Telephone number: 831-655-1334

G Gross receipts \$: 1,680,334.

ALLIANCE ON AGING, INC.
247 MAIN STREET
SALINAS, CA 93901

F Name and address of principal officer: TERESA SULLIVAN
SAME AS C ABOVE

H(a) Is this a group return for affiliates? Yes No
H(b) Are all affiliates included? Yes No
 If 'No,' attach a list. (see instructions)

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

J Website: ▶ WWW.ALLIANCEONAGING.ORG

H(c) Group exemption number ▶

K Form of organization: Corporation Trust Association Other ▶ **L** Year of Formation: 1970 **M** State of legal domicile: CA

Part I Summary

1 Briefly describe the organization's mission or most significant activities: PROVIDES SERVICES AND RESOURCES THAT PROMOTE THE SAFETY, DIGNITY, AUTONOMY, AND QUALITY OF LIFE FOR SENIORS IN MONTEREY COUNTY.

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

3 Number of voting members of the governing body (Part VI, line 1a)	<u>3</u>	<u>10</u>
4 Number of independent voting members of the governing body (Part VI, line 1b)	<u>4</u>	<u>10</u>
5 Total number of individuals employed in calendar year 2010 (Part V, line 2a)	<u>5</u>	<u>97</u>
6 Total number of volunteers (estimate if necessary)	<u>6</u>	<u>125</u>
7a Total unrelated business revenue from Part VIII, column (C), line 12	<u>7a</u>	<u>0.</u>
7b Net unrelated business taxable income from Form 990-T, line 34	<u>7b</u>	<u>0.</u>

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	<u>1,617,811.</u>	<u>1,678,883.</u>
9 Program service revenue (Part VIII, line 2g)		
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<u>-10,405.</u>	<u>-2,479.</u>
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<u>-4,449.</u>	
12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<u>1,602,957.</u>	<u>1,676,404.</u>
13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		
14 Benefits paid to or for members (Part IX, column (A), line 4)		
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<u>1,226,909.</u>	<u>1,270,495.</u>
16a Professional fundraising fees (Part IX, column (A), line 11e)		
b Total fundraising expenses (Part IX, column (D), line 25) ▶ <u>111,392.</u>		
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	<u>347,608.</u>	<u>335,947.</u>
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<u>1,574,517.</u>	<u>1,606,442.</u>
19 Revenue less expenses. Subtract line 18 from line 12	<u>28,440.</u>	<u>69,962.</u>
	Beginning of Current Year	End of Year
20 Total assets (Part X, line 16)	<u>576,590.</u>	<u>586,476.</u>
21 Total liabilities (Part X, line 26)	<u>157,144.</u>	<u>91,923.</u>
22 Net assets or fund balances. Subtract line 21 from line 20	<u>419,446.</u>	<u>494,553.</u>

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: Nancy Dolton Date: 02/14/12

Type or print name and title: NANCY DOLTON PRESIDENT

Paid Preparer Use Only

Print/Type preparer's name: MIKE NOLAN Preparer's signature: Mike Nolan Date: 2/13/2012 Check if self-employed PTIN: N/A

Firm's name: HAYASHI & WAYLAND, CPA'S Firm's EIN: N/A

Firm's address: 1188 PADRE DRIVE, SUITE 101 Phone no.: 831-759-6300
SALINAS, CA 93901

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 to any question in this Part III. X

1 Briefly describe the organization's mission:

SEE SCHEDULE O

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 exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts 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 \$ 577,709. including grants of \$) (Revenue \$ 568,134.)

SEE SCHEDULE O

4b (Code:) (Expenses \$ 251,868. including grants of \$) (Revenue \$ 255,689.)

SEE SCHEDULE O

4c (Code:) (Expenses \$ 157,177. including grants of \$) (Revenue \$ 175,023.)

SEE SCHEDULE O

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

(Expenses \$ 374,159. including grants of \$) (Revenue \$ 210,937.)

4e Total program service expenses 1,360,913.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors? (see instructions)	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If 'Yes,' complete Schedule D, Part V	X	
11 If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI	X	
b Did the organization report an amount for investments— other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII		X
c Did the organization report an amount for investments— program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX	X	
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E		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, and program service activities outside the United States? If 'Yes,' complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions)		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20 a Did the organization operate one or more hospitals? If 'Yes,' complete Schedule H		X
b If 'Yes' to line 20a, did the organization attach its audited financial statements to this return? Note. Some Form 990 filers that operate one or more hospitals must attach audited financial statements (see instructions)		

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II.</i>		X
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III.</i>		X
23 Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J.</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25.</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3) and 501(c)(4) organizations. 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 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
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If 'Yes,' complete Schedule L, Part II.</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If 'Yes,' complete Schedule L, Part III.</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i>		X
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
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV.</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M.</i>		X
30 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
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I.</i>		X
32 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
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I.</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1.</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)?		X
a 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> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
36 Section 501(c)(3) organizations. 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
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI.</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O.	X	

BAA

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V.

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. 1a 11		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. 1b 0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? 1c X	X	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. 2a 97		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? 2b X	X	
Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. (see instructions)			
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year? 3a		X
b	If 'Yes' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O. 3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? 4a		X
b	If 'Yes,' enter the name of the foreign country: See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? 5a		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? 5b		X
c	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T? 5c		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible? 6a		X
b	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 6b		
7 Organizations that may receive deductible contributions under section 170(c).			
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? 7a		X
b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided? 7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? 7c		X
d	If 'Yes,' indicate the number of Forms 8282 filed during the year. 7d		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 7e		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? 7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? 7h		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year? 8		
9 Sponsoring organizations maintaining donor advised funds.			
a	Did the organization make any taxable distributions under section 4966? 9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person? 9b		
10 Section 501(c)(7) organizations. Enter:			
a	Initiation fees and capital contributions included on Part VIII, line 12. 10a		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. 10b		
11 Section 501(c)(12) organizations. Enter:			
a	Gross income from members or shareholders. 11a		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) 11b		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? 12a		
b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year. 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
a	Is the organization licensed to issue qualified health plans in more than one state? 13a		
Note. See the instructions for additional information the organization must report on Schedule O.			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. 13b		
c	Enter the amount of reserves on hand. 13c		
14a	Did the organization receive any payments for indoor tanning services during the tax year? 14a		X
b	If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation 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 to any question in this Part VI. X

Section A. Governing Body and Management

		Yes	No
1 a	Enter the number of voting members of the governing body at the end of the tax year.		
1 b	Enter the number of voting members included in line 1a, above, who are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Does the organization have members or stockholders?		X
7 a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
7 b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
8 a	The governing body?	X	
8 b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director or 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.		X

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

	Yes	No
10 a		X
10 b		
11 a	X	
12 a	X	
12 b	X	
12 c	X	
13	X	
14	X	
15 a	X	
15 b	X	
16 a		X
16 b		

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed ▶ CA
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
 Own website Another's website Upon request
- 19 Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. SEE SCHEDULE O
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization:
 ▶ JOHN ASSAAD 247 MAIN STREET SALINAS CA 93901 831-655-4246

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

Check if Schedule O contains a response to any question 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) Name and title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) NANCY DOLTON PRESIDENT	2	X		X			0.	0.	0.	
(2) THOMAS S PARKS VICE PRESIDENT	2	X		X			0.	0.	0.	
(3) LESLIE SURBER TREASURER	2	X		X			0.	0.	0.	
(4) VEARL GISH SECRETARY	2	X		X			0.	0.	0.	
(5) GALEN CALL DIRECTOR	2	X					0.	0.	0.	
(6) CAROL MOLLMAN DIRECTOR	2	X					0.	0.	0.	
(7) ALLAN MARCUS DIRECTOR	2	X					0.	0.	0.	
(8) IGNACIO GALINDO DIRECTOR	2	X					0.	0.	0.	
(9) MERRILYN MANCINI DIRECTOR	2	X					0.	0.	0.	
(10) NATHAN FUENTES DIRECTOR	2	X					0.	0.	0.	
(11) TERESA SULLIVAN EXECUTIVE DIREC	40			X			65,493.	0.	2,901.	
(12) BECKY MANN DIRECTOR OF OP	40			X			57,398.	0.	8,062.	
(13) JOHN ASSAAD FINANCE DIR	40			X			0.	0.	0.	
(14) ANNA DIAZ-INFANTE ACCOUNTING MGR	40			X			52,466.	0.	4,980.	
(15)										
(16)										
(17)										

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

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Sch O)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) -----										
(19) -----										
(20) -----										
(21) -----										
(22) -----										
(23) -----										
(24) -----										
(25) -----										
(26) -----										
(27) -----										
(28) -----										
(29) -----										
1 b Sub-total							175,357.	0.	15,943.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							175,357.	0.	15,943.	

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

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual.</i>	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? <i>If 'Yes' complete Schedule J for such individual.</i>	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? <i>If 'Yes,' complete Schedule J for such person.</i>	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.

(A) Name and business address	(B) Description of services	(C) Compensation

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

Part VIII Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS	1 a Federated campaigns	1 a					
	b Membership dues	1 b					
	c Fundraising events	1 c					
	d Related organizations	1 d					
	e Government grants (contributions)	1 e	1,132,751.				
	f All other contributions, gifts, grants, and similar amounts not included above	1 f	546,132.				
	g Noncash contributions included in lns 1a-1f: \$						
	h Total. Add lines 1a-1f		1,678,883.				
PROGRAM SERVICE REVENUE	Business Code						
	2 a						
	b						
	c						
	d						
	e						
	f All other program service revenue						
g Total. Add lines 2a-2f							
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts)		1,451.			1,451.	
	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 assets other than inventory	(i) Securities	(ii) Other				
		b Less: cost or other basis and sales expenses			3,930.		
		c Gain or (loss)			-3,930.		
		d Net gain or (loss)			-3,930.	-3,930.	
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See 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 Part IV, line 19	a					
b Less: direct expenses		b					
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	a						
	b Less: cost of goods sold	b					
	c Net income or (loss) from sales of inventory						
Miscellaneous Revenue		Business Code					
11 a							
b							
c							
d All other revenue							
e Total. Add lines 11a-11d							
12 Total revenue. See instructions			1,676,404.	-3,930.	0.	1,451.	

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) but are not required to complete columns (B), (C), and (D).

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	189,002.	113,401.	58,591.	17,010.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.	0.	0.	0.
7 Other salaries and wages	915,745.	851,445.	16,270.	48,030.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	8,533.	7,839.		694.
9 Other employee benefits	65,382.	58,614.	4,874.	1,894.
10 Payroll taxes	91,833.	81,374.	4,409.	6,050.
11 Fees for services (non-employees):				
a Management				
b Legal	20,498.	20,498.		
c Accounting	21,875.	14,000.	5,913.	1,962.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other	72,088.	50,459.	12,975.	8,654.
12 Advertising and promotion	14,459.	12,837.	609.	1,013.
13 Office expenses	113,257.	80,872.	11,378.	21,007.
14 Information technology				
15 Royalties				
16 Occupancy	29,999.	18,698.	9,263.	2,038.
17 Travel	17,814.	16,667.	549.	598.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	990.		990.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	12,610.	7,036.	5,479.	95.
23 Insurance	9,304.	7,585.	894.	825.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24f. If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O.)				
a VOLUNTEER COSTS	11,550.	11,550.		
b MISCELLANEOUS	6,448.	5,398.	512.	538.
c DUES & SUBSCRIPTIONS	5,055.	2,640.	1,431.	984.
d				
e				
f All other expenses				
25 Total functional expenses. Add lines 1 through 24f	1,606,442.	1,360,913.	134,137.	111,392.
26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

		(A)		(B)		
		Beginning of year		End of year		
ASSETS	1	Cash — non-interest-bearing	200.	1	200.	
	2	Savings and temporary cash investments	355,066.	2	306,490.	
	3	Pledges and grants receivable, net	140,756.	3	189,534.	
	4	Accounts receivable, net	265.	4	224.	
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5		
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions)		6		
	7	Notes and loans receivable, net		7		
	8	Inventories for sale or use		8		
	9	Prepaid expenses and deferred charges	883.	9	6,540.	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	133,417.		
	b	Less: accumulated depreciation	10b	86,627.	10c	46,790.
	11	Investments — publicly traded securities			11	
	12	Investments — other securities. See Part IV, line 11			12	
	13	Investments — program-related. See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11		24,200.	15	36,698.
16	Total assets. Add lines 1 through 15 (must equal line 34)		576,590.	16	586,476.	
LIABILITIES	17	Accounts payable and accrued expenses	143,542.	17	84,797.	
	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	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities. Complete Part X of Schedule D		13,602.	25	7,126.
	26	Total liabilities. Add lines 17 through 25		157,144.	26	91,923.
NET ASSETS OR FUND BALANCES	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29 and lines 33 and 34.					
	27	Unrestricted net assets	342,613.	27	368,222.	
	28	Temporarily restricted net assets	76,833.	28	126,331.	
	29	Permanently restricted net assets		29		
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.					
	30	Capital stock or trust principal, or current funds			30	
	31	Paid-in or capital surplus, or land, building, or equipment fund			31	
	32	Retained earnings, endowment, accumulated income, or other funds			32	
	33	Total net assets or fund balances.		419,446.	33	494,553.
	34	Total liabilities and net assets/fund balances.		576,590.	34	586,476.

BAA

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI.

1	Total revenue (must equal Part VIII, column (A), line 12)	1	1,676,404.
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,606,442.
3	Revenue less expenses. Subtract line 2 from line 1	3	69,962.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	419,446.
5	Other changes in net assets or fund balances (explain in Schedule O) . . .SEE .SCHEDULE .O	5	5,145.
6	Net assets or fund balances at end of year. Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	494,553.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question 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?

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

b Were the organization's financial statements audited by an independent accountant?

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.

d If 'Yes' to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both:

Separate basis Consolidated basis Both consolidated and separate basis

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.

BAA

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. ▶ See separate instructions.

OMB No. 1545-0047

2010

Open to Public Inspection

Name of the organization ALLIANCE ON AGING, INC.	Employer identification number 94-1747036
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Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

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

- 1 A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions – subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or 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 that describes the type of supporting organization and complete lines 11e through 11h.
 - a Type I b Type II c Type III – Functionally integrated d Type III – Other
- e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?	11 g (i)	
(ii) A family member of a person described in (i) above?	11 g (ii)	
(iii) A 35% controlled entity of a person described in (i) or (ii) above?	11 g (iii)	

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

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in column (i) listed in your governing document?		(v) Did you notify the organization in column (i) of your support?		(vi) Is the organization in column (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include "unusual grants.")	1,260,849.	1,353,547.	1,560,779.	1,617,811.	1,678,883.	7,471,869.
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf.						0.
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
4 Total. Add lines 1 through 3.	1,260,849.	1,353,547.	1,560,779.	1,617,811.	1,678,883.	7,471,869.
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).						0.
6 Public support. Subtract line 5 from line 4.						7,471,869.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
7 Amounts from line 4.	1,260,849.	1,353,547.	1,560,779.	1,617,811.	1,678,883.	7,471,869.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources.	9,679.	-8,061.	-36,303.	1,713.	1,451.	-31,521.
9 Net income from unrelated business activities, whether or not the business is regularly carried on.						0.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						0.
11 Total support. Add lines 7 through 10.						7,440,348.
12 Gross receipts from related activities, etc (see instructions).					12	0.
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here .						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2010 (line 6, column (f) divided by line 11, column (f)).	14	100.0 %
15 Public support percentage from 2009 Schedule A, Part II, line 14.	15	100.0 %

16a **33-1/3% support test – 2010.** If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization.

b **33-1/3% support test – 2009.** If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization.

17a **10%-facts-and-circumstances test – 2010.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization.

b **10%-facts-and-circumstances test – 2009.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization.

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

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

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

Section A. Public Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants'.)						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						
6 Total. Add lines 1 through 5.						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b.						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
9 Amounts from line 6.						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources.						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (Add lns 9, 10c, 11, and 12.)						

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2010 (line 8, column (f) divided by line 13, column (f)).	15	%
16 Public support percentage from 2009 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2010 (line 10c, column (f) divided by line 13, column (f)).	17	%
18 Investment income percentage from 2009 Schedule A, Part III, line 17.	18	%

19a 33-1/3% support tests – 2010. 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 – 2009. 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. ▶

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF

OMB No. 1545-0047

2010

Name of the organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

- 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, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules

For a section 501(c)(3) organization 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), and received from any one contributor, during the year, a contribution 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 a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc, purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc, purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc, contributions of \$5,000 or more during the year. ▶ \$ _____

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

BAA 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) (2010)

Name of organization

Employer identification number

ALLIANCE ON AGING, INC.

94-1747036

Part I Contributors (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	PERRY FLICKER 825 PADRE DR SALINAS, CA 93901	\$ 68,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II if there is a noncash contribution.)</small>
2	COMMUNITY FDN MTRY CO 2354 GARDEN ROAD MONTEREY, CA 93940	\$ 158,589.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II if there is a noncash contribution.)</small>
3	HARDEN FOUNDATION P.O. BOX 779 SALINAS, CA 93902	\$ 65,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II if there is a noncash contribution.)</small>
4	COUNTY OF MONTEREY 168 W ALISAL STREET SALINAS, CA 93901	\$ 530,863.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II if there is a noncash contribution.)</small>
5	UNITED WAY OF MOCO 60 GARDEN COURT STE 350 MONTEREY, CA 93940	\$ 40,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II if there is a noncash contribution.)</small>
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II if there is a noncash contribution.)</small>

Name of organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

Part II Noncash Property (see instructions.)

Table with 4 columns: (a) No. from Part I, (b) Description of noncash property given, (c) FMV (or estimate) (see instructions), (d) Date received. The first row contains 'N/A' in column (b) and a dollar sign (\$) in column (c).

BAA

Name of organization

Employer identification number

ALLIANCE ON AGING, INC.

94-1747036

Part III Exclusively religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. Complete cols (a) through (e) and the following line entry.

For organizations completing Part III, enter total of *exclusively* religious, charitable, etc, contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11, or 12.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No. 1545-0047

2010

Open to Public Inspection

Name of the organization

Employer identification number

ALLIANCE ON AGING, INC.

94-1747036

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate 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' to Form 990, Part IV, line 7.

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

Preservation of land for public use (e.g., recreation or education) Preservation of an historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

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

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d

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

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

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

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

7 Amount of expenses incurred in monitoring, inspecting, 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 XIV, 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' to Form 990, Part IV, line 8.

1 a 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 XIV, 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) Revenues included in 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 Revenues included in Form 990, Part VIII, line 1. ▶ \$ _____

b Assets included in Form 990, Part X. ▶ \$ _____

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

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

- a Public exhibition
- b Scholarly research
- c Preservation for future generations
- d Loan or exchange programs
- e Other _____

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

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 organization answered 'Yes' to 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 XIV and complete the following table:

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

2a Did the organization include an amount on Form 990, Part X, line 21? Yes No

b If 'Yes,' explain the arrangement in Part XIV.

Part V Endowment Funds. Complete if the organization answered 'Yes' to 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	24,200.	22,674.	29,214.		
b Contributions					
c Net investment earnings, gains, and losses	5,742.	3,275.	-5,225.		
d Grants or scholarships					
e Other expenditures for facilities and programs	1,644.	1,749.	1,315.		
f Administrative expenses					
g End of year balance	28,298.	24,200.	22,674.		

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ▶ 100.00 %
- b Permanent endowment ▶ _____ %
- c Term endowment ▶ _____ %

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

	Yes	No
(i) unrelated organizations	X	
(ii) related organizations		X
b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?		

4 Describe in Part XIV the intended uses of the organization's endowment funds. **SEE PART XIV**

Part VI Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(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		112,833.	71,779.	41,054.
e Other		20,584.	14,848.	5,736.
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				46,790.

BAA

Part VII Investments—Other Securities. See Form 990, Part X, line 12. N/A

(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) -----		
(I) -----		
Total. (Column (b) must equal Form 990 Part X, column (B) line 12.)		

Part VIII Investments—Program Related. (See Form 990, Part X, line 13) N/A

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.)		

Part IX Other Assets. (See Form 990, Part X, line 15)

(a) Description	(b) Book value
(1) DEPOSIT	8,400.
(2) INVESTMENTS DESIGNATED AS ENDOWMENT	28,298.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15)	36,698.

Part X Other Liabilities. (See Form 990, Part X, line 25)

(a) Description of liability	(b) Amount
(1) Federal income taxes	
(2) CAPITAL LEASE OBLIGATIONS	7,126.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25)	7,126.

2. FIN 48 (ASC 740) Footnote. In Part XIV, 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). **SEE PART XIV**

Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)		1,676,404.
2	Total expenses (Form 990, Part IX, column (A), line 25)		1,606,442.
3	Excess or (deficit) for the year. Subtract line 2 from line 1		69,962.
4	Net unrealized gains (losses) on investments		5,145.
5	Donated services and use of facilities		
6	Investment expenses		
7	Prior period adjustments		
8	Other (Describe in Part XIV)		
9	Total adjustments (net). Add lines 4 through 8		5,145.
10	Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9		75,107.

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements		1	2,186,098.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains on investments	2a	5,145.	
b	Donated services and use of facilities	2b	500,619.	
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIV)	2d		
e	Add lines 2a through 2d		2e	505,764.
3	Subtract line 2e from line 1		3	1,680,334.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIV). SEE PART XIV	4b	-3,930.	
c	Add lines 4a and 4b		4c	-3,930.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	1,676,404.

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements		1	2,110,991.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a	500,619.	
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIV). SEE PART XIV	2d	3,930.	
e	Add lines 2a through 2d		2e	504,549.
3	Subtract line 2e from line 1		3	1,606,442.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIV)	4b		
c	Add lines 4a and 4b		4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	1,606,442.

Part XIV Supplemental Information

Complete this part to 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, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

PART V, LINE 4 - INTENDED USES OF ENDOWMENT FUND

THE ABOVE FUNDS ARE HELD AT THE COMMUNITY FOUNDATION FOR MONTEREY COUNTY AS

BOARD-DESIGNATED FUNDS FOR GENERAL USE AND FOR THE OMBUDSMAN PROGRAM.

PART X - FIN 48 FOOTNOTE

THE ORGANIZATION IS EXEMPT FROM INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND SECTION 23701D OF THE CALIFORNIA REVENUE AND TAXATION CODE.

THE FINANCIAL ACCOUNTING STANDARDS BOARD ISSUED NEW GUIDANCE ON ACCOUNTING FOR

Part XIV Supplemental Information (continued)

PART X - FIN 48 FOOTNOTE (CONTINUED)

UNCERTAINTY IN INCOME TAXES. THE ORGANIZATION ADOPTED THIS NEW GUIDANCE FOR THE YEAR ENDED JUNE 30, 2010. MANAGEMENT EVALUATED THE ORGANIZATION'S TAX POSITION AND CONCLUDED THAT THE ORGANIZATION HAD TAKEN NO UNCERTAIN TAX POSITIONS THAT REQUIRE ADJUSTMENT TO THE FINANCIAL STATEMENTS TO COMPLY WITH THE PROVISIONS OF THIS GUIDANCE. WITH FEW EXCEPTIONS, THE ORGANIZATION IS NO LONGER SUBJECT TO INCOME TAX EXAMINATIONS BY THE U.S. FEDERAL, STATE OR LOCAL TAX AUTHORITIES FOR YEARS BEFORE 2007.

2010

SCHEDULE D, PART XIV - SUPPLEMENTAL INFORMATION PAGE 4

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ALLIANCE ON AGING, INC.

94-1747036

2/14/12

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SCHEDULE D, PART XII, LINE 4B
OTHER REVENUE INCLUDED ON FORM 990 BUT NOT INCLUDED IN F/S

LOSS ON DISPOSAL OF ASSETS	\$	-3,930.
TOTAL	\$	<u>-3,930.</u>

SCHEDULE D, PART XIII, LINE 2D
OTHER EXPENSES AND LOSSES PER AUDITED F/S

LOSS ON DISPOSAL OF ASSETS	\$	3,930.
TOTAL	\$	<u>3,930.</u>

SCHEDULE O
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

2010

Department of the Treasury
Internal Revenue Service

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.

Open to Public
Inspection

Name of the organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

FORM 990, PART III, LINE 1 - ORGANIZATION MISSION

"TO SUSTAIN AN EVOLVING COMMUNITY NETWORK OF VIABLE PROGRAMS THAT FOSTER HEALTHY LIVING." ESTABLISHED IN 1970, THE ALLIANCE ON AGING PROVIDES SERVICES AND RESOURCES THAT PROMOTE THE SAFETY, DIGNITY, AUTONOMY, AND QUALITY OF LIFE FOR SENIORS IN MONTEREY COUNTY. AS THE PRIMARY LINK TO DIRECT SERVICES AND REFERRALS TO OTHER SPECIALIZED PROVIDERS, THE ALLIANCE MAKES IT POSSIBLE FOR SENIORS TO RECEIVE THE COMPREHENSIVE ASSISTANCE THAT EXTENDS THEIR INDEPENDENCE, PROTECTS THEM FROM ABUSE, AND ENHANCES THEIR LIVES. THE OMBUDSMAN PROGRAM, INSTITUTED IN 1981, SERVES SENIORS RESIDING IN LONG-TERM CARE FACILITIES, AND MERGED WITH THE ALLIANCE IN 2004. IN FY 10-11, THE ALLIANCE SERVED 7,448 INDIVIDUALS AND MORE THAN 69,000 UNITS OF SERVICE AS DESCRIBED IN THE PROGRAM DESCRIPTIONS. SERVICES ARE DELIVERED THROUGH FIVE MAJOR PROGRAMS AND OTHER ANCILLARY SERVICES.

FORM 990, PART III, LINE 4A - PROGRAM SERVICE ACCOMPLISHMENTS

THE SENIOR EMPLOYMENT AND TRAINING (SET) IS A FEDERALLY SPONSORED NATIONAL PROGRAM THROUGH SENIOR SERVICE AMERICA THAT EXPANDS ECONOMIC AND EMPLOYMENT OPPORTUNITIES FOR LOW AND EXTREMELY LOW-INCOME SENIORS BY PLACING THEM IN PAID TEMPORARY WORK ASSIGNMENTS WITH NON-PROFIT OR PUBLIC AGENCIES WHILE PROVIDING THEM WITH THE TRAINING THEY NEED IN ORDER TO RE-ENTER THE WORKFORCE. THE MAJORITY OF SENIOR EMPLOYMENT PROGRAM PARTICIPANTS SUBSIST SOLELY ON SOCIAL SECURITY. THE PROGRAM PUTS MONEY IN SENIORS' POCKETS, WHICH CAN HAVE A DIRECT IMPACT ON THEIR ABILITY TO MEET BASIC NEEDS. INDIVIDUALS WORK AN AVERAGE OF 20 HOURS PER WEEK FOR \$8.00 PER HOUR. IN FY10-11, SENIOR EMPLOYMENT SERVED 59 INDIVIDUALS AND PROVIDED 48,909 UNITS OF SERVICE, OR HOURS OF SERVICE TO COMMUNITY ORGANIZATIONS. A SHORT-TERM, ADJUNCT COMPUTER TRAINING PROGRAM ENTITLED DIGITAL INCLUSION FUNDED BY THE NATIONAL SPONSOR TRAINED 456 SENIORS HOW TO USE THE INTERNET AND EMAIL COMMUNICATIONS OVER THE COURSE OF 2,090 LEARNING SESSIONS.

Name of the organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

FORM 990, PART III, LINE 4B - PROGRAM SERVICE ACCOMPLISHMENTS**HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP)**

THE HICAP PROGRAM PROVIDES COUNSELING AND INFORMATION ON TOPICS SUCH AS MEDICARE, HEALTH INSURANCE BENEFITS, AND LONG-TERM CARE INSURANCE, TO COUNTY RESIDENTS. HICAP PROVIDES ESSENTIAL SERVICES TO MEDICARE BENEFICIARIES, INCLUDING THE ELDERLY AND DISABLED INDIVIDUALS. SERVICES INCLUDE HELP NAVIGATING THE MEDICARE CLAIM SYSTEM, WITH ANNUAL ENROLLMENT IN PART D, AND INITIAL ENROLLMENT. HICAP COUNSELORS ARE TRAINED AND CERTIFIED BY THE STATE OF CALIFORNIA DEPARTMENT OF AGING TO CONDUCT SEMINARS AND INDIVIDUAL COUNSELING SESSIONS TO HELP SENIORS NAVIGATE THE MEDICARE SYSTEM AND ITS OFTEN COMPLEX CHANGES. NUMEROUS COMMUNITY EDUCATION SEMINARS WERE HELD THROUGHOUT THE COUNTY IN FY 10-11 ON THE FOLLOWING TOPICS: MEDICARE/PART D UPDATE, BOOMER EDUCATION, BEING A GOOD PATIENT, AND SCAMS AND FRAUD. IN FY 10-11, 1,717 INDIVIDUALS RECEIVED 1,109 HOURS OF HEALTH INSURANCE COUNSELING RESULTING IN AN ESTIATED \$350,803 IN INSURANCE SAVINGS; ANOTHER 3,082 ATTENDED 69 COMMUNITY SEMINARS TO LEARN ABOUT MEDICARE AS WELL AS LONG-TERM CARE COVERAGE, AND RELATED SUBJECTS.

FORM 990, PART III, LINE 4C - PROGRAM SERVICE ACCOMPLISHMENTS

THE SENIOR PEER COUNSELING PROGRAM OFFERS EMOTIONAL SUPPORT THROUGH NO-COST, INDIVIDUAL HOME-BASED AND GROUP PEER COUNSELING SESSIONS TO SENIORS WHO ARE EXPERIENCING GRIEF AND DEPRESSION DUE TO LOSS, LONELINESS, ISOLATION, AND OTHER STRESSES OF AGING AND TRANSITIONS IN LIFE. IN FY 10-11, SENIOR PEER COUNSELING SERVED 221 INDIVIDUALS AND PROVIDED 3,995 UNITS OF SERVICE. THE PROGRAM GRADUATED 11 NEW SENIOR PEER COUNSELORS.

OUTREACH EFFORTS TO SPANISH-SPEAKING SENIORS ALSO INCLUDE WELLNESS LECTURE SERIES WITH TOPICS SUCH AS: "LA SABIDURIA DE LOS MAYORES" ("THE WISDOM OF THE ELDERS"), "APOYO Y CONSUELO PARA EL CORAZON EN TIEMPOS DE CAMBIO Y PERDIDA" ("SUPPORT AND

Name of the organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

FORM 990, PART III, LINE 4C - PROGRAM SERVICE ACCOMPLISHMENTS

HEALING FOR THE HEART IN TIMES OF CHANGE AND LOSS"), "EL EFECTO DE DEPRESION EN EL DIABETES Y LAS ENFERMEDADES CRONICOS" ("THE IMPACT OF DEPRESSION ON DIABETES AND CHRONIC ILLNESSES), "COMO PROMOVER RELACIONES SANOS EN LA FAMILIA CON COMUNICACION EFECTIVO" ("HOW TO PROMOTE HEALTHY RELATIONSHIPS WITH EFFECTIVE COMMUNICATION IN THE FAMILY"), AND "CUANTO NECESITO DORMIR?" ("HOW MUCH SLEEP DO I NEED?")

FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION

OMBUDSMAN PROGRAM

THE OMBUDSMAN PROGRAM IS DEDICATED TO ENSURING THE SAFETY AND WELL-BEING OF ALL RESIDENTS IN LONG-TERM CARE. OMBUDSMAN STAFF AND VOLUNTEERS ADVOCATE ON BEHALF OF THE 2,065 SENIORS AND DISABLED ADULTS RESIDING IN LONG-TERM CARE IN MONTEREY COUNTY, ACTING AS SPOKESPERSONS FOR THOSE WHO ARE WITHOUT FAMILY OR FRIENDS TO SPEAK ON THEIR BEHALF, OR WHO FEAR RETALIATION IF THEY COMPLAIN. OMBUDSMAN'S PLACEMENT SERVICES BENEFIT FAMILY MEMBERS AND CAREGIVERS SEARCHING FOR LONG-TERM CARE FACILITY INFORMATION AND GUIDANCE FOR THEIR LOVED ONES. OMBUDSMAN HELPS PLACE THE SENIOR IN A SAFE LIVING ENVIRONMENT WITH THE APPROPRIATE LEVEL OF CARE REQUIRED FOR OPTIMUM HEALTH AS WELL AS A POSITIVE SOCIAL SETTING. IN FY 10-11, THE OMBUDSMAN PROGRAM SERVED 453 INDIVIDUALS AND PROVIDED 4,937 UNITS OF SERVICE. THE PROGRAM GRADUATED FIVE INDIVIDUALS FROM THE 36 HOUR VOLUNTEER TRAINING COURSE.

PROGRAM DEVELOPMENT WAS A ONE-YEAR INITIATIVE OF THE ALLIANCE ON AGING TO FOCUS DEDICATED STAFF TIME TOWARD THE RESEARCH AND DEVELOPMENT OF A NEW PROGRAM. THE EFFORT INCLUDED ANALYSIS OF BEST PRACTICES AND THE DEVELOPMENT OF A BUSINESS PLAN AS WELL AS THE ESTABLISHMENT OF THE NEW CONSIGNMENT/DONATION BENEFIT STORE, SPIRALS.

TAX COUNSELING FOR THE ELDERLY PROGRAM HAS A TANGIBLE IMPACT ON MOVING SENIORS FROM CRISIS TO STABILITY BY ASSISTING WITH THE FILING OF INCOME TAX RETURNS AND ECONOMIC

Name of the organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION

STIMULUS PAYMENTS AND HELPING SENIORS TO OBTAIN REFUNDS. EVERY EXTRA DOLLAR THESE SENIORS RECEIVE IMPACTS THEIR ABILITY TO SURVIVE, ESPECIALLY NOW THAT MANY OTHER PUBLIC ASSISTANCE PROGRAMS, SUCH AS THOSE DETAILED PREVIOUSLY, HAVE ATROPHIED. IN FY 10-11, THE PROGRAM SERVED 1,239 INDIVIDUALS AND HELPED SECURE OVER \$712,997 IN REFUNDS.

OUTREACH PROGRAM. THE AOA'S OUTREACH PROGRAM TRAVELS THROUGHOUT MONTEREY COUNTY TO INFORM AND EDUCATE THE GENERAL PUBLIC, IN PARTICULAR SENIORS AND THEIR CARE PARTNERS, ABOUT SERVICES AVAILABLE TO THEM THROUGH THE ALLIANCE ON AGING AS WELL AS OTHER AREA AGENCY ON AGING-FUNDED PROGRAMS, E.G. MEALS ON WHEELS, LEGAL SERVICES FOR SENIORS, ALZHEIMER'S ASSOCIATION. OUTREACH ENABLES THE ALLIANCE ON AGING TO PROVIDE INFORMATION IN ENGLISH AND SPANISH TO UNDERSERVED SENIOR IN REMOTE AREAS OF THE COUNTY. MANY CLIENTS ASSISTED AT THESE VENUES ARE SEEKING INFORMATION ON BEHALF OF AN ELDERLY PARENT, GRANDPARENT OR FAMILY MEMBER. FY 10-11 LOCAL VENUES INCLUDED: EL DIA DEL TRABAJADOR DE AGRICOLA (DAY OF THE FARM WORKER) IN GREENFIELD, SACRED HEART CHURCH IN SALINAS, LAGUNA GRANDE PARK IN SEASIDE, ANNUAL FIESTA AT OUR LADY OF SOLITUDE CHURCH IN SOLEDAD, JULY 4TH CAR SHOW IN KING CITY, GREENFIELD COMMUNITY CENTER FOR THE COMMUNITY DIALOGUE SPONSORED BY THE MONTEREY COUNTY HEALTH DEPARTMENT AND DISTRICT SUPERVISOR SIMON SALINAS, RETIREE APPRECIATION DAY AT STILLWELL COMMUNITY CENTER IN SEASIDE, SALINAS VALLEY PRIDE PICNIC IN SALINAS, FESTIVAL DE ARTE COMUNITARIO AT NATIVIDAD CREEK PARK IN SALINAS, THE SALINAS ARTS FESTIVAL AT SHERWOOD PARK, THE WEST END CELEBRATION IN SAND CITY, THE PRUNEDALE SENIOR CENTER, AND THE PAJARO AND CASTROVILLE LIBRARIES. THE PROGRAM REACHED 33,292 PERSONS THROUGH ATTENDANCE AT THESE VENUES. AN ESTIMATED 202,338 WERE REACHED THROUGH MEDIA OUTLETS INCLUDING TV AND RADIO.

Name of the organization

ALLIANCE ON AGING, INC.

Employer identification number

94-1747036

FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION

SENIOR LUNCHEON PROGRAM OFFERS A HOT MEAL AND SOCIALIZATION TO 169 SENIORS EACH YEAR, SERVING A TOTAL OF 2,508 HOT LUNCHESES. A FREQUENT FEATURE OF THE MEAL IS FREE PRODUCE OFFERED BY SALINAS VALLEY GROWERS, AND LIVE MUSICAL ENTERTAINMENT.

THE CAREGIVER TRAINING PROGRAM TRAINED 52 FAMILY CAREGIVERS OVER 608 HOURS TO PROVIDE PERSONAL CARE TO A LOVED ONE WHO IS HOMEBOUND AND NEEDS PERSONAL ASSISTANCE. TRAINING MODULES INCLUDE CURRICULA ON BATHING, TRANSFERRING, DEMENTIA, LIFTING, AND MORE.

FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS

THE ALLIANCE ON AGING, INC. ENGAGES A CPA FIRM TO ASSIST WITH PREPARATION AND FILING OF THE FORM 990, BASED ON AUDIT ENGAGEMENT PERFORMED BY THE SAME CPA FIRM. ONCE THE CPA HAS COMPLETED A DRAFT OF THE FORM 990, A COPY WILL BE SENT TO THE BOARD OF DIRECTORS FOR REVIEW BEFORE THE TAX RETURN IS FILED.

FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS

EACH BOARD MEMBER AND MANAGEMENT PERSONNEL ARE REQUIRED TO COMPLETE CONFLICT OF INTEREST DISCLOSURE STATEMENT ANNUALLY. IF ANY CONFLICTS ARISE THE BOARD SHALL RESOLVE THEM IMMEDIATELY.

FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS FOR CEO, EXEC. DIR., OR TOP MG

THE PERSONNEL COMMITTEE OF THE BOARD REVIEWS SALARIES OF KEY PERSONNEL AT THE POINT OF HIRE. THE PERSONNEL COMMITTEE DEVELOPED A COMPENSATION PLAN TO REVIEW RELEVANT WAGE AND BENEFITS.

FORM 990, PART VI, LINE 15B - COMPENSATION REVIEW & APPROVAL PROCESS FOR OFFICERS & KEY EMPLOYEE

THE PERSONNEL COMMITTEE OF THE BOARD REVIEWS SALARIES OF KEY PERSONNEL AT THE POINT OF HIRE. THE PERSONNEL COMMITTEE DEVELOPED A COMPENSATION PLAN TO REVIEW RELEVANT WAGE AND BENEFITS.

Name of the organization

Employer identification number

ALLIANCE ON AGING, INC.

94-1747036

FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE

GOVERNING DOCS, POLICIES AND FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON
REQUEST.

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ALLIANCE ON AGING, INC.

94-1747036

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FORM 990, PART XI, LINE 5
OTHER CHANGES IN NET ASSETS OR FUND BALANCES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS.....	\$	5,145.
TOTAL	\$	<u>5,145.</u>

6/30/11

2010 FEDERAL BOOK DEPRECIATION SCHEDULE

PAGE 1

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ALLIANCE ON AGING, INC.

94-1747036

2/14/12

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NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS. PCT.	CUR 179 BONUS	SPECIAL DEPR. ALLOW.	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC. BAL DEPR.	SALVAGE /BASIS REDUCT.	DEPR. BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.					
																	8,090	8,090	8,090	8,090	8,090
FORM 990/990-PF																					
AUTO / TRANSPORT EQUIPMENT																					
6	2001 CHEVY VAN	3/05/05		8,090							8,090	8,090	S/L	5		0					
TOTAL AUTO / TRANSPORT EQUIP																					
FURNITURE AND FIXTURES																					
3	FURNITURE	VARIOUS		18,244							18,244	10,701	S/L	7		2,153					
4	FURNITURE - RESTRICTED	VARIOUS		1,698							1,698	1,098	S/L	7		254					
TOTAL FURNITURE AND FIXTURE																					
MACHINERY AND EQUIPMENT																					
1	EQUIPMENT	VARIOUS		63,041							63,041	37,378	S/L	5		5,074					
2	EQUIPMENT - RESTRICTED	VARIOUS		41,604							41,604	16,348	S/L	5		5,129					
7	EQUIPMENT & FURNITURE	6/30/11		7,583							7,583	3,653				0					
TOTAL MACHINERY AND EQUIPME																					
MISCELLANEOUS																					
5	SOFTWARE - OB	1/01/07		642							642	642	S/L	3		0					
TOTAL MISCELLANEOUS																					
TOTAL DEPRECIATION																					
														140,902	0	0	0	140,902	77,910		12,610

2010 FEDERAL BOOK DEPRECIATION SCHEDULE

CLIENT 41610

ALLIANCE ON AGING, INC.

94-1747036

08:38AM

2/14/12

JNO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	BUS. PCT.	CUR 179 BONUS	SPECIAL DEPR. ALLOW.	PRIOR 179 BONUS/ SP. DEPR.	PRIOR DEC. BAL DEPR.	SALVAGE /BASIS REDUCT.	DEPR. BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
	GRAND TOTAL DEPRECIATION				140,902	0	0	0	0	140,902	77,910				12,610
	DEPRECIATION ASSETS SOLD				7,583	0	0	0	0	7,583	3,653				0
	DEPR REMAINING ASSETS				133,319	0	0	0	0	133,319	74,257				12,610