

Form **8868**

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

(Rev. January 2017)

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service

▶ **File a separate application for each return.**
▶ **Information about Form 8868 and its instructions is at www.irs.gov/form8868.**

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

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

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

Enter filer's identifying number, see instructions

Type or print <small>File by the due date for filing your return. See instructions.</small>	Name of exempt organization or other filer, see instructions. Arizona Chapter of the Association of Legal Administrators	Employer identification number (EIN) or 86-0442748
	Number, street, and room or suite no. If a P.O. box, see instructions. PO Box 2629	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Phoenix, AZ 85002-2629	

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 1

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

• The books are in the care of ▶ **The Organization**

Telephone No. ▶ **602-329-8343** Fax No. ▶ **602-271-4018**

• If the organization does not have an office or place of business in the United States, check this box
 • If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 6-month extension of time until **February 15**, 20 **19**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ calendar year 20 ____ or
 ▶ tax year beginning **April 1**, 20 **20**, and ending **March 31**, 20 **18**.

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

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$

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

Form **990-EZ**

Short Form

Return of Organization Exempt From Income Tax

OMB No. 1545-1150

2017

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

Open to Public Inspection

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

▶ Go to www.irs.gov/Form990EZ for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

A For the 2017 calendar year, or tax year beginning April 1, 2017, and ending March 31, 20 18

B Check if applicable:

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

C Name of organization
Arizona Chapter of the Association of Legal Administrators
 Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
PO Box 2629
 City or town, state or province, country, and ZIP or foreign postal code
Phoenix, AZ 85002-2629

D Employer identification number
86-0442748

E Telephone number
(602) 329-8343

F Group Exemption Number ▶

G Accounting Method: Cash Accrual Other (specify) ▶

H Check if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

I Website: ▶ www.alaphoenix.org

J Tax-exempt status (check only one) – 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527

K Form of organization: Corporation Trust Association Other

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ ▶ \$

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)
Check if the organization used Schedule O to respond to any question in this Part I

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	
	2	Program service revenue including government fees and contracts	2	83,657
	3	Membership dues and assessments	3	4,901
	4	Investment income	4	15
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less: cost or other basis and sales expenses	5b	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
	6	Gaming and fundraising events		
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
b	Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b		
c	Less: direct expenses from gaming and fundraising events	6c		
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d		
7a	Gross sales of inventory, less returns and allowances	7a		
b	Less: cost of goods sold	7b		
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		
8	Other revenue (describe in Schedule O)	8		
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶	9	88,573
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	
	13	Professional fees and other payments to independent contractors	13	
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	
	16	Other expenses (describe in Schedule O)	16	
	17	Total expenses. Add lines 10 through 16 ▶	17	
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	122,703
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	-34,130
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ▶	21	-34,130

Part II Balance Sheets (see the instructions for Part II)
 Check if the organization used Schedule O to respond to any question in this Part II

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	139,776	22 105,646
23 Land and buildings		23
24 Other assets (describe in Schedule O)		24
25 Total assets	139,776	25 105,646
26 Total liabilities (describe in Schedule O)	0	26 0
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	139,776	27 105,646

Part III Statement of Program Service Accomplishments (see the instructions for Part III)
 Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose? Statement 2

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

	Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)
28 _____ _____ _____ (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	28a
29 _____ _____ _____ (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	29a
30 _____ _____ _____ (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	30a
31 Other program services (describe in Schedule O) (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	31a
32 Total program service expenses (add lines 28a through 31a)	32

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated—see the instructions for Part IV)
 Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
M. Sharon Williams President	10	0	0	0
Sonji Le Blanc President-Elect	5	0	0	0
Carrie Valenzuela Vice President	5	0	0	0
Julie Skelton Treasurer	5	0	0	0
Lisa Kelly Sceretary	5	0	0	0
Dana Mariano Director-at-Large	1	0	0	0
Narinda Greene Director-at-Large	1	0	0	0
Teri Adams Director-at-Large	1	0	0	0
Teresie Zmyslinski Director-at-Large	1	0	0	0
Marsha Kendall, SPHR Immediate Past President	2	0	0	0

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

Table with columns for question number, question text, and Yes/No response boxes. Questions range from 33 to 45b, covering topics like significant activities, organizational changes, business income, and controlled entities.

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	Yes	No
46	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Part VI Section 501(c)(3) organizations only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

47 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	Yes	No
47	<input type="checkbox"/>	<input checked="" type="checkbox"/>
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		<input checked="" type="checkbox"/>
49a Did the organization make any transfers to an exempt non-charitable related organization?		<input checked="" type="checkbox"/>
b If "Yes," was the related organization a section 527 organization?		<input checked="" type="checkbox"/>
49b		<input checked="" type="checkbox"/>

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

f Total number of other employees paid over \$100,000 ▶ _____

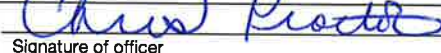
51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 ▶ _____

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A ▶ Yes No

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: <u>9-6-2018</u>
	Type or print name and title: Chris Proctor, Past President	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶	Firm's EIN ▶			
	Firm's address ▶	Phone no.			

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

FORM 990EZ, PART I - OTHER EXPENSES

INSURANCE	466
PUBLIC RELATIONS	1,274
CONFERENCES, CONVENTIONS	96,515
MISCELLANEOUS	6,008
BOARD MEETINGS	379
COMMITTEE EXPENSE	17,982
PUBLICATIONS	<u>80</u>
TOTAL	<u><u>122,703</u></u>

FORM 990EZ, PART I - INVESTMENT INCOME

INTEREST INCOME

15

TOTAL

15

FORM 990EZ, PART II - CASH, SAVINGS AND INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING OF YEAR</u>	<u>END OF YEAR</u>
CASH	139,776	105,646
TOTALS	139,776	105,646

Greater Phoenix-Valley of the Sun Chapter of the Association of Legal Administrators**Statement of Program Service Accomplishments - 2017**

A primary goal of the Association of Legal Administrators ("ALA") is to be "the source" for information relative to law office administration. As such, The Valley of the Sun Chapter of ALA conducts an annual education conference and vendor show, monthly luncheon meetings and a leadership event among other opportunities for its members to learn more about law office management.

Monthly Luncheons

Ongoing monthly luncheons are scheduled for the membership. At the luncheons, 45-60 minutes are allotted to a speaker to provide valuable information in one of several core activities for law office management including, but not limited to, human resource management, insurance, accounting, marketing and facilities management. The chapter also hosts monthly Specialty Luncheons, focusing on human resources/diversity, finance/operations and diversity/inclusion.

Leadership Event

Once each year the chapter invites its members, managing partners, and other key management of local law offices to attend this event. This year's event was a luncheon program entitled "Creating Your Personal Brand & Creating a Legacy", presented by Dominic Bartola.

Annual Education Conference & Symposium

Once each year the chapter hosts an education conference that is open to everyone in the legal community. It is a day of education along with a hosted vendor hall. The sessions for this year included: "Employment Law Update", by Joseph T. Clees, Esq.; "Hire & be Hired Using Social Media" by Jennifer K. Hill; "Coaching for Development (Getting People to Think)" by Kristina M. Moris; and "Creating Empowerment for Staff" by Jennifer K. Hill. The vendor hall gives members and the legal community a chance to interact with the chapter's Business Partners who play an integral part in providing the education sessions to the members.

Other Program Services

For this year's Community Connection project, the chapter again chose Guide Dogs for the Blind. The chapter worked to raise awareness and funds at the law firm level. Local law firms contributed directly to the charity which enabled them to utilize the tax deduction. Those firms that contributed received an office visit from a local guide dog. Guide dogs were also present at local chapter events to promote the program.

The Board of Directors meets monthly to conduct the business and planning aspects of chapter management.

Senior Chapter officers are sent to a Chapter Leadership Institute, the Regional Meeting and the Annual Meeting of the Association.

The chapter maintains a library for membership use.

**Valley of the Sun Chapter
Association of Legal Administrators**

List of Officers and Directors for the Year 2017

<p>Marsha Kendall, SPHR Past President Steptoe & Johnson 201 E Washington St, # 1600 Phoenix, AZ 85004</p>	<p>M Sharon Williams President Gammage & Burnham 2 North Central Ave, 15th Floor Phoenix, AZ 85004</p>
<p>Sonji Le Blanc President Elect DLA Piper LLP 5934 W Charlotte Dr, #1000 Glendale, AZ 85310</p>	<p>Carrie Valenzuela Vice President Meagher & Geer, PLLP 8800 N Gainey Center Dr, #261 Scottsdale, AZ 85258</p>
<p>Lisa Kelly Secretary Perkins Coie LLP 2901 N Central Ave, #2000 Phoenix, AZ 85012</p>	<p>Julie Skelton Treasurer Bauman Loewe Witt & Maxwell 8765 E Bell Road Scottsdale, AZ 85260</p>
<p>Dana Mariano Director-at-Large Jones, Skelton & Hochuli, PLC 40 N Central Ave, #2700 Phoenix, AZ 85004</p>	<p>Narinda Greene Director-at-Large Jones, Skelton & Hochuli, PLC 40 N Central Ave, #2700 Phoenix, AZ 85004</p>
<p>Teri Adam Director-at-Large The Miles Group 11240 N Tatum Blvd, #110 Phoenix, AZ 85028</p>	<p>Teresie Zmyslinski Director -at-Large Andante Law Group 4110 N Scottsdale Rd, #330 Scottsdale, AZ 85251</p>

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