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Form **990**

Department of the Treasury Internal Revenue Service

# Return of Organization Exempt From Income Tax

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

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

OMB No 1545-0047

**2006**

**Open to Public Inspection**

**A For the 2006 calendar year, or tax year beginning 01-01-2006 and ending 12-31-2006**

**B** Check if applicable
- Address change
- Name change
- Initial return
- Final return
- Amended return
- Application pending

**Please use IRS label or print or type. See Specific Instructions.**

**C** Name of organization
AARP

Number and street (or P O box if mail is not delivered to street address) | Room/suite
601 E Street NW c/o Tax Department

City or town, state or country, and ZIP + 4
Washington, DC 20049

**D Employer identification number**
95-1985500

**E Telephone number**
(202) 434-3220

**F Accounting method** ☐ Cash ☑ Accrual
☐ Other (specify) ▶

● **Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).**

**H** and **I** *are not applicable to section 527 organizations*

**H(a)** Is this a group return for affiliates? ☐ Yes ☑ No

**H(b)** If "Yes" enter number of affiliates ▶

**H(c)** Are all affiliates included? ☐ Yes ☐ No
(If "No," attach a list See instructions )

**H(d)** Is this a separate return filed by an organization covered by a group ruling? ☐ Yes ☑ No

**I** Group Exemption Number ▶

**M** Check ▶ ☑ if the organization is **not** required to attach Sch B (Form 990, 990-EZ, or 990-PF)

**G Web site:** ▶ wwwaarporg

**J Organization type** (check only one) ▶ ☑ 501(c) (4) ◀ (insert no ) ☐ 4947(a)(1) or ☐ 527

**K** Check here ▶ ☐ if the organization is not a 509(a)(3) supporting organization **and** its gross receipts are normally **not** more than 25,000 A return is not required, but if the organization chooses to file a return, be sure to file a complete return

**L** Gross receipts Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 1,968,032,699

## Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances *(See the instructions.)*

**Revenue**

| | | | | | |
|---|---|---|---|---|---|
| 1 | Contributions, gifts, grants, and similar amounts received | | | | |
| a | Contributions to donor advised funds | 1a | | | |
| b | Direct public support (not included on line 1a) | 1b | 5,045,383 | | |
| c | Indirect public support (not included on line 1a) | 1c | | | |
| d | Government contributions (grants) (not included on line 1a) | 1d | | | |
| e | **Total** (add lines 1a through 1d) (cash $ 5,045,383 noncash $ ) | | | 1e | 5,045,383 |
| 2 | Program service revenue including government fees and contracts (from Part VII, line 93) | | | 2 | 518,806,323 |
| 3 | Membership dues and assessments | | | 3 | 239,719,243 |
| 4 | Interest on savings and temporary cash investments | | | 4 | 775,677 |
| 5 | Dividends and interest from securities | | | 5 | 59,374,560 |
| 6a | Gross rents | 6a | 3,143,682 | | |
| b | Less rental expenses | 6b | 2,773,538 | | |
| c | Net rental income or (loss) subtract line 6b from line 6a | | | 6c | 370,144 |
| 7 | Other investment income (describe ▶ ) | | | 7 | |

| | | (A) Securities | | (B) Other | | |
|---|---|---|---|---|---|---|
| 8a | Gross amount from sales of assets other than inventory | 1,134,479,517 | 8a | 1,008,611 | | |
| b | Less cost or other basis and sales expenses | 1,086,497,256 | 8b | 1,111,070 | | |
| c | Gain or (loss) (attach schedule) | 47,982,261 | 8c | -102,459 | | |
| d | Net gain or (loss) Combine line 8c, columns (A) and (B) | | | | 8d | 47,879,802 |

| | | | | | |
|---|---|---|---|---|---|
| 9 | Special events and activities (attach schedule) If any amount is from **gaming**, check here ▶ ☐ | | | | |
| a | Gross revenue (not including $ ____ of contributions reported on line 1b) | 9a | | | |
| b | Less direct expenses other than fundraising expenses | 9b | | | |
| c | Net income or (loss) from special events Subtract line 9b from line 9a | | | 9c | |
| 10a | Gross sales of inventory, less returns and allowances | 10a | | | |
| b | Less cost of goods sold | 10b | | | |
| c | Gross profit or (loss) from sales of inventory (attach schedule) Subtract line 10b from line 10a | | | 10c | |
| 11 | Other revenue (from Part VII, line 103) | | | 11 | 5,679,703 |
| 12 | **Total revenue** Add lines 1e, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11 | | | 12 | 877,650,835 |

**Expenses**

| | | | |
|---|---|---|---|
| 13 | Program services (from line 44, column (B)) | 13 | 729,536,007 |
| 14 | Management and general (from line 44, column (C)) | 14 | 167,130,769 |
| 15 | Fundraising (from line 44, column (D)) | 15 | 6,621,562 |
| 16 | Payments to affiliates (attach schedule) | 16 | |
| 17 | **Total expenses** Add lines 16 and 44, column (A) | 17 | 903,288,338 |

**Net Assets**

| | | | |
|---|---|---|---|
| 18 | Excess or (deficit) for the year Subtract line 17 from line 12 | 18 | -25,637,503 |
| 19 | Net assets or fund balances at beginning of year (from line 73, column (A)) | 19 | 282,229,539 |
| 20 | Other changes in net assets or fund balances (attach explanation) | 20 | -21,314,212 |
| 21 | Net assets or fund balances at end of year Combine lines 18, 19, and 20 | 21 | 235,277,824 |

**Part II** **Statement of Functional Expenses** All organizations must complete column (A) Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others *(See the instructions.)*

| | *Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.* | | (A) Total | (B) Program services | (C) Management and general | (D) Fundraising |
|---|---|---|---|---|---|---|
| 22a | Grants paid from donor advised funds (attach Schedule) (cash $_____ noncash $_____) If this amount includes foreign grants, check here ☐ | 22a | | | | |
| 22b | Other grants and allocations (attach schedule) (cash $_____ noncash $_____) If this amount includes foreign grants, check here ☐ | 22b | | | | |
| 23 | Specific assistance to individuals (attach schedule) | 23 | | | | |
| 24 | Benefits paid to or for members (attach schedule) | 24 | | | | |
| 25a | Compensation of current officers, directors, key employees etc Listed in Part V-A (attach schedule) | 25a | 3,370,484 | 109,735 | 3,260,749 | |
| b | Compensation of former officers, directors, key employees etc listed in Part V-B (attach schedule) | 25b | 335,000 | | 335,000 | |
| c | Compensation and other distributions not icluded above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) (attach schedule) | 25c | | | | |
| 26 | Salaries and wages of employees not included on lines 25a, b and c | 26 | 170,430,102 | 115,240,946 | 54,190,521 | 998,635 |
| 27 | Pension plan contributions not included on lines 25a, b and c | 27 | 27,952,706 | 23,118,662 | 4,662,492 | 171,552 |
| 28 | Employee benefits not included on lines 25a - 27 | 28 | 23,729,052 | 19,627,638 | 3,911,394 | 190,020 |
| 29 | Payroll taxes | 29 | 10,146,383 | 6,718,995 | 3,369,164 | 58,224 |
| 30 | Professional fundraising fees | 30 | 474,443 | | | 474,443 |
| 31 | Accounting fees | 31 | 678,726 | 52,718 | 626,008 | |
| 32 | Legal fees | 32 | 2,725,329 | 499,486 | 2,225,843 | |
| 33 | Supplies | 33 | 5,216,322 | 4,436,879 | 776,896 | 2,547 |
| 34 | Telephone | 34 | 3,845,196 | 2,964,651 | 874,126 | 6,419 |
| 35 | Postage and shipping | 35 | 117,274,185 | 113,642,856 | 2,565,971 | 1,065,358 |
| 36 | Occupancy | 36 | 16,317,551 | 10,312,486 | 5,998,502 | 6,563 |
| 37 | Equipment rental and maintenance | 37 | 6,410,027 | 3,681,143 | 2,728,884 | |
| 38 | Printing and publications | 38 | 117,586,550 | 115,153,476 | 495,000 | 1,938,074 |
| 39 | Travel | 39 | 12,343,440 | 9,732,008 | 2,464,043 | 147,389 |
| 40 | Conferences, conventions, and meetings | 40 | 13,482,815 | 11,915,489 | 1,524,338 | 42,988 |
| 41 | Interest | 41 | 12,554,317 | | 12,554,317 | |
| 42 | Depreciation, depletion, etc (attach schedule) | 42 | 19,721,471 | 6,147,804 | 13,555,348 | 18,319 |
| 43 | Other expenses not covered above (itemize) | | | | | |
| a | See Additional Data Table | 43a | | | | |
| b | | 43b | | | | |
| c | | 43c | | | | |
| d | | 43d | | | | |
| e | | 43e | | | | |
| f | | 43f | | | | |
| g | | 43g | | | | |
| 44 | **Total functional expenses.** Add lines 22a through 43g (Organizations completing columns (B)-(D), carry these totals to lines 13–15) | 44 | 903,288,338 | 729,536,007 | 167,130,769 | 6,621,562 |

**Joint Costs.** Check ☑ if you are following SOP 98-2

Are any joint costs from a combined educational campaign and fundraising solicitation reported in **(B)** Program services? ☑ **Yes** ☐ **No**

If "Yes," enter **(i)** the aggregate amount of these joint costs $ 1,760,896, **(ii)** the amount allocated to Program services $ 333,914, **(iii)** the amount allocated to Management and general $ _____, and **(iv)** the amount allocated to Fundraising $ 1,426,982

## Part III Statement of Program Service Accomplishments *(See the instructions.)*

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization How the public perceives an organization in such cases may be determined by the information presented on its return Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments

What is the organization's primary exempt purpose? ▶ Founded in 1958, AARP is a nonprofit, nonpartisan membership organization for people age 50 and over AARP is dedicated to enhancing the quality of life for all as we age AARP leads positive social change and delivers value to members through information, advocacy, and service

All organizations must describe their exempt purpose achievements in a clear and concise manner State the number of clients served, publications issued, etc Discuss achievements that are not measurable (Section 501(c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others )

| | | **Program Service Expenses** (Required for 501(c)(3) and (4) orgs , and 4947(a)(1) trusts, but optional for others ) |
|---|---|---|
| **a** | See Additional Data Table<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | |
| **b** | (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | |
| **c** | (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | |
| **d** | (Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | |
| **e** | Other program services (attach schedule)<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | |
| **f** | **Total of Program Service Expenses** (should equal line 44, column (B), Program services) . . . . ▶ | 729,536,007 |

**Part IV** **Balance Sheets** ***(See the instructions.)***

| | Line | Description | Sub-line | Sub-amount | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|---|---|
| | **Note:** | *Where required, attached schedules and amounts within the description column should be for end-of-year amounts only.* | | | | | |
| Assets | 45 | Cash—non-interest-bearing | | | 18,637,024 | 45 | 17,277,047 |
| | 46 | Savings and temporary cash investments | | | 39,386,385 | 46 | 43,010,570 |
| | 47a | Accounts receivable | 47a | 38,134,579 | | | |
| | b | Less allowance for doubtful accounts | 47b | 224,880 | 36,904,606 | 47c | 37,909,699 |
| | 48a | Pledges receivable | 48a | | | | |
| | b | Less allowance for doubtful accounts | 48b | | | 48c | |
| | 49 | Grants receivable | | | | 49 | |
| | 50a | Receivables from current and former officers, directors, trustees, and key employees (attach schedule) | | | | 50a | |
| | b | Receivables from other disqualified persons (as defined under section 4958(c)(3)(B) (attach schedule) | | | | 50b | |
| | 51a | Other notes and loans receivable (attach schedule) | 51a | 1,550,137 | | | |
| | b | Less allowance for doubtful accounts | 51b | | 1,550,137 | 51c | 1,550,137 |
| | 52 | Inventories for sale or use | | | | 52 | |
| | 53 | Prepaid expenses and deferred charges | | | 31,799,062 | 53 | 28,702,011 |
| | 54a | Investments—publicly-traded securities ▶ ☐ Cost ☑ FMV | | | 599,808,986 | 54a | 567,722,474 |
| | b | Investments—other securities (attach schedule) ▶ ☐ Cost ☐ FMV | | | | 54b | |
| | 55a | Investments—land, buildings, and equipment basis | 55a | | | | |
| | b | Less accumulated depreciation (attach schedule) | 55b | | | 55c | |
| | 56 | Investments—other (attach schedule) | | | 36,394,084 | 56 | 36,798,397 |
| | 57a | Land, buildings, and equipment basis | 57a | 390,529,400 | | | |
| | b | Less accumulated depreciation (attach schedule) | 57b | 121,272,349 | 229,318,191 | 57c | 269,257,051 |
| | 58 | Other assets, including program-related investments (describe ▶ ) | | | 39,058,193 | 58 | 26,305,487 |
| | 59 | **Total assets** (must equal line 74) Add lines 45 through 58 | | | 1,032,856,668 | 59 | 1,028,532,873 |
| Liabilities | 60 | Accounts payable and accrued expenses | | | 117,405,808 | 60 | 123,008,391 |
| | 61 | Grants payable | | | | 61 | |
| | 62 | Deferred revenue | | | 206,954,299 | 62 | 216,718,109 |
| | 63 | Loans from officers, directors, trustees, and key employees (attach schedule) | | | | 63 | |
| | 64a | Tax-exempt bond liabilities (attach schedule) | | | | 64a | |
| | b | Mortgages and other notes payable (attach schedule) | | | 205,687,797 | 64b | 205,037,670 |
| | 65 | Other liabilities (describe ▶ ) | | | 220,579,225 | 65 | 248,490,879 |
| | 66 | **Total liabilities** Add lines 60 through 65 | | | 750,627,129 | 66 | 793,255,049 |
| Net Assets or Fund Balances | | **Organizations that follow SFAS 117, check here ▶** ☑ and complete lines 67 through 69 and lines 73 and 74 | | | | | |
| | 67 | Unrestricted | | | 282,229,539 | 67 | 235,277,824 |
| | 68 | Temporarily restricted | | | | 68 | |
| | 69 | Permanently restricted | | | | 69 | |
| | | **Organizations that do not follow SFAS 117, check here ▶** ☐ and complete lines 70 through 74 | | | | | |
| | 70 | Capital stock, trust principal, or current funds | | | | 70 | |
| | 71 | Paid-in or capital surplus, or land, building, and equipment fund | | | | 71 | |
| | 72 | Retained earnings, endowment, accumulated income, or other funds | | | | 72 | |
| | 73 | **Total net assets or fund balances** Add lines 67 through 69 **or** lines 70 through 72 (Column (A) **must** equal line 19 and column (B) **must** equal line 21) | | | 282,229,539 | 73 | 235,277,824 |
| | 74 | **Total liabilities and net assets / fund balances** Add lines 66 and 73 | | | 1,032,856,668 | 74 | 1,028,532,873 |

**Part IV-A** **Reconciliation of Revenue per Audited Financial Statements With Revenue per Return** *(See the instructions.)*

| | | | | | |
|---|---|---|---|---|---|
| **a** | Total revenue, gains, and other support per audited financial statements | | | **a** | 1,009,578,261 |
| **b** | Amounts included on line **a** but not on Part I, line 12 | | | | |
| 1 | Net unrealized gains on investments | **b1** | -21,594,781 | | |
| 2 | Donated services and use of facilities | **b2** | | | |
| 3 | Recoveries of prior year grants | **b3** | | | |
| 4 | Other (specify) | **b4** | 163,864,941 | | |
| | Add lines **b1** through **b4** | | | **b** | 142,270,160 |
| **c** | Subtract line **b** from line **a** | | | **c** | 867,308,101 |
| **d** | Amounts included on Part I, line 12, but not on line **a** | | | | |
| 1 | Investment expenses not included on Part I, line 6b | **d1** | | | |
| 2 | Other (specify) | **d2** | 10,342,734 | | |
| | Add lines **d1** and **d2** | | | **d** | 142,270,160 |
| **e** | **Total revenue** (Part I, line 12) Add lines **c** and **d** ▶ | | | **e** | 877,650,835 |

**Part IV-B** **Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

| | | | | | |
|---|---|---|---|---|---|
| **a** | Total expenses and losses per audited financial statements | | | **a** | 1,040,398,001 |
| **b** | Amounts included on line **a** but not on Part I, line 17 | | | | |
| 1 | Donated services and use of facilities | **b1** | | | |
| 2 | Prior year adjustments reported on Part I, line 20 | **b2** | | | |
| 3 | Losses reported on Part I, line 20 | **b3** | | | |
| 4 | Other (specify) | **b4** | 144,304,845 | | |
| | Add lines **b1** through **b4** | | | **b** | 144,304,845 |
| **c** | Subtract line **b** from line **a** | | | **c** | 896,093,156 |
| **d** | Amounts included on Part I, line 17, but not on line **a:** | | | | |
| 1 | Investment expenses not included on Part I, line 6b | **d1** | | | |
| 2 | Other (specify) | **d2** | 7,195,182 | | |
| | Add lines **d1** and **d2** | | | **d** | 7,195,182 |
| **e** | **Total expenses** (Part I, line 17) Add lines **c** and **d** ▶ | | | **e** | 903,288,338 |

**Part V-A** **Current Officers, Directors, Trustees, and Key Employees** (List each person who was an officer, director, trustee, or key employee at any time during the year even if they were not compensated.) *(See the instructions.)*

| **(A)** Name and address | **(B)** Title and average hours per week devoted to position | **(C)** Compensation **(If not paid, enter -0-.)** | **(D)** Contributions to employee benefit plans & deferred compensation plans | **(E)** Expense account and other allowances |
|---|---|---|---|---|
| See Additional Data Table | | | | |
| | | | | |
| | | | | |
| | | | | |
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| | | | | |

**Part V-A Current Officers, Directors, Trustees, and Key Employees** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| **75a** | Enter the total number of officers, directors, and trustees permitted to vote on organization business at board meetings . . . ▶ 21 | | | |
| **b** | Are any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, related to each other through family or business relationships? If "Yes," attach a statement that identifies the individuals and explains the relationship(s) . | **75b** | | No |
| **c** | Do any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, receive compensation from any other organizations, whether tax exempt or taxable, that are related to the organization? See the instructions for the definition of "related organization" . . . ▶ | **75c** | | No |
| | If "Yes," attach a statement that includes the information described in the instructions | | | |
| **d** | Does the organization have a written conflict of interest policy? . . . | **75d** | Yes | |

**Part V-B Former Officers, Directors, Trustees, and Key Employees That Received Compensation or Other Benefits** (If any former officer, director, trustee, or key employee received compensation or other benefits (described below) during the year, list that person below and enter the amount of compensation or other benefits in the appropriate column. See the instructions.)

| **(A)** Name and address | **(B)** Loans and Advances | **(C)** Compensation (If not paid enter -0- ) | **(D)** Contributions to employee benefit plans and deferred compensation plans | **(E)** Expense account and other allowances |
|---|---|---|---|---|
| Ms Christine Donohoo<br>601 E Street NW<br>Washington, DC 20049 | 0 | 335,000 | 0 | 0 |
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**Part VI Other Information** *(See the instructions.)*

| | | | Yes | No |
|---|---|---|---|---|
| **76** | Did the organization make a change in its activities or methods of conducting activities? If "Yes," attach a detailed statement of each change . . . | **76** | | No |
| **77** | Were any changes made in the organizing or governing documents but not reported to the IRS? . . . | **77** | | No |
| | If "Yes," attach a conformed copy of the changes | | | |
| **78a** | Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return? . . . | **78a** | Yes | |
| **b** | If "Yes," has it filed a tax return on **Form 990-T** for this year? . . . | **78b** | Yes | |
| **79** | Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement . . . | **79** | | No |
| **80a** | Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc , to any other exempt or nonexempt organization? . . . | **80a** | Yes | |
| **b** | If "Yes," enter the name of the organization ▶ See Additional Data Table and check whether it is ☐ exempt **or** ☐ nonexempt | | | |
| **81a** | Enter direct or indirect political expenditures (See line 81 instructions ) . . . **81a** | | | |
| **b** | Did the organization file **Form 1120-POL** for this year? . . . | **81b** | | No |

**Part VI Other Information** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| **82a** | Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value? | **82a** | | No |
| **b** | If "Yes," you may indicate the value of these items here Do not include this amount as revenue in Part I or as an expense in Part II (See instructions in Part III) **82b** | | | |
| **83a** | Did the organization comply with the public inspection requirements for returns and exemption applications? | **83a** | Yes | |
| **b** | Did the organization comply with the disclosure requirements relating to quid pro quo contributions? | **83b** | Yes | |
| **84a** | Did the organization solicit any contributions or gifts that were not tax deductible? | **84a** | Yes | |
| **b** | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | **84b** | Yes | |
| **85** | *501(c)(4), (5), or (6) organizations.* **a** Were substantially all dues nondeductible by members? | **85a** | Yes | |
| **b** | Did the organization make only in-house lobbying expenditures of $2,000 or less? | **85b** | | No |
| | If "Yes," was answered to either 85a or 85b, **do not** complete 85c through 85h below unless the organization received a waiver for proxy tax owed the prior year | | | |
| **c** | Dues assessments, and similar amounts from members **85c** | | | |
| **d** | Section 162(e) lobbying and political expenditures **85d** | | | |
| **e** | Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices **85e** | | | |
| **f** | Taxable amount of lobbying and political expenditures (line 85d less 85e) **85f** | | | |
| **g** | Does the organization elect to pay the section 6033(e) tax on the amount on line 85f? | **85g** | | |
| **h** | If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year? | **85h** | | |
| **86** | *501(c)(7) orgs.* Enter **a** Initiation fees and capital contributions included on line 12 **86a** | | | |
| **b** | Gross receipts, included on line 12, for public use of club facilities **86b** | | | |
| **87** | *501(c)(12) orgs.* Enter **a** Gross income from members or shareholders **87a** | | | |
| **b** | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them) **87b** | | | |
| **88a** | At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? If "Yes," complete Part IX | **88a** | Yes | |
| **b** | At any time during the year, did the organization directly or indirectly own a controlled entity within the meaning of section 512(b)(13)? If yes complete Part XI | **88b** | Yes | |
| **89a** | *501(c)(3) organizations* Enter Amount of tax imposed on the organization during the year under section 4911 ▶ ______, section 4912 ▶ ______, section 4955 ▶ ______ | | | |
| **b** | *501(c)(3) and 501(c)(4) orgs.* Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction | **89b** | | No |
| **c** | Enter Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0 | | | |
| **d** | Enter Amount of tax on line 89c, above, reimbursed by the organization ▶ | | | |
| **e** | *All organizations.* At any time during the tax year was the organization a party to a prohibited tax shelter transaction? | **89e** | | No |
| **f** | *All organizations.* Did the organization acquire direct or indirect interest in any applicable insurance contract? | **89f** | | No |
| **g** | *For supporting organizations and sponsoring organizations maintaining donor advised funds.* Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | **89g** | | No |

**90a** List the states with which a copy of this return is filed ▶ See Additional Data Table

**b** Number of employees employed in the pay period that includes March 12, 2006 (See instructions) **90b** 1,849

**91a** The books are in care of ▶ AARP Telephone no ▶ (202) 434-3220

Located at ▶ 601 E Street NW Washington, DC ZIP + 4 ▶ 20049

| | | | Yes | No |
|---|---|---|---|---|
| **b** | At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | **91b** | | No |

If "Yes," enter the name of the foreign country ▶

See the instructions for exceptions and filing requirements for **Form TD F 90-22.1**, Report of Foreign Bank and Financial Accounts

## Part VI Other Information *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| c | At any time during the calendar year, did the organization maintain an office outside of the United States? | 91c | | No |
| | If "Yes," enter the name of the foreign country ▶ | | | |

92 *Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of* **Form 1041**—Check here . . . . . . . . . . ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the tax year . . . . ▶ | 92 |

## Part VII Analysis of Income-Producing Activities *(See the instructions.)*

**Note:** *Enter gross amounts unless otherwise indicated.*

| | Unrelated business income | | Excluded by section 512, 513, or 514 | | (E) Related or exempt function income |
|---|---|---|---|---|---|
| | (A) Business code | (B) Amount | (C) Exclusion code | (D) Amount | |
| 93 Program service revenue | | | | | |
| a Publication advertising | 541800 | 122,813,171 | | | |
| b Royalties | | | 15 | 382,876,076 | |
| c Program income | | | | | 13,117,076 |
| d | | | | | |
| e | | | | | |
| f Medicare/Medicaid payments . . . . . . | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 94 Membership dues and assessments . . . | | | | | 239,719,243 |
| 95 Interest on savings and temporary cash investments | | | 14 | 775,677 | |
| 96 Dividends and interest from securities . . . | | | 14 | 59,374,560 | |
| 97 Net rental income or (loss) from real estate | | | | | |
| a debt-financed property . . . . . . . . | | | | | |
| b non debt-financed property . . . . . . . | 812930 | 118,876 | 16 | 251,268 | |
| 98 Net rental income or (loss) from personal property | | | | | |
| 99 Other investment income . . . . . . . | | | | | |
| 100 Gain or (loss) from sales of assets other than inventory | | | 18 | 44,805,689 | 3,074,113 |
| 101 Net income or (loss) from special events . . | | | | | |
| 102 Gross profit or (loss) from sales of inventory | | | | | |
| 103 Other revenue a Miscellaneous income | | | 01 | 5,679,703 | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| 104 Subtotal (add columns (B), (D), and (E)) . . | | 122,932,047 | | 493,762,973 | 255,910,432 |

105 **Total** (add line 104, columns (B), (D), and (E)) . . . . . . . . . . . . . . . . . . . ▶ 872,605,452

**Note:** *Line 105 plus line 1e, Part I, should equal the amount on line 12, Part I.*

## Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes *(See the instructions.)*

| Line No. ▼ | Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) |
|---|---|
| 93c | communities, and consumer protection The primary purpose for which membership dues are collected and spent is for the support of the organization and its programs (c f Reg |
| 94 | SEC 1 170A-9(e)(7)(iii) |
| | |
| | |

## Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities *(See the instructions.)*

| (A) Name, address, and EIN of corporation, partnership, or disregarded entity | (B) Percentage of ownership interest | (C) Nature of activities | (D) Total income | (E) End-of-year assets |
|---|---|---|---|---|
| See Additional Data Table | % | | | |
| | % | | | |
| | % | | | |
| | % | | | |

## Part X Information Regarding Transfers Associated with Personal Benefit Contracts *(See the instructions.)*

**(a)** Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . ☐ Yes ☑ No

**(b)** Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . ☐ Yes ☑ No

**NOTE:** *If "Yes" to* ***(b)****, file Form 8870* ***and*** *Form 4720 (see instructions).*

**Part XI** **Information Regarding Transfers To and From Controlled Entities** *Complete only if the organization is a controlling organization as defined in section 512(b)(13)*

| | | Yes | No |
|---|---|---|---|
| **106** | Did the reporting organization **make** any transfers **to** a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity | | No |

| | (A) Name and address of each controlled entity | (B) Employer Identification Number | (C) Description of transfer | (D) Amount of transfer |
|---|---|---|---|---|
| | **Totals** | | | |

| | | Yes | No |
|---|---|---|---|
| **107** | Did the reporting organization **receive** any transfers **from** a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity | Yes | |

| | (A) Name and address of each controlled entity | (B) Employer Identification Number | (C) Description of transfer | (D) Amount of transfer |
|---|---|---|---|---|
| | **Totals** | | | 2,773,538 |

| | | Yes | No |
|---|---|---|---|
| **108** | Did the organization have a binding written contract in effect on August 17, 2006 covering the interests, rents, royalties and annuities described in question 107 above? | Yes | |

**Please Sign Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

****** | 2007-06-29
Signature of officer | Date

Robert R Hagans Jr CFO
Type or print name and title

**Paid Preparer's Use Only**

| Preparer's signature | Date | Check if self-empolyed ☐ | Preparer's SSN or PTIN (See Gen Inst W) |
|---|---|---|---|
| Firm's name (or yours if self-employed), address, and ZIP + 4 | | | EIN |
| | | | Phone no |

# Additional Data

**Software ID:**
**Software Version:**
**EIN:** 95-1985500
**Name:** AARP

**Form 990, Part II, Line 43 - Other expenses not covered above (itemize):**

| *Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.* | | (A) Total | (B) Program services | (C) Management and general | (D) Fundraising |
|---|---|---|---|---|---|
| **a** Administrative & personnel costs | **43a** | 3,256,227 | 887,214 | 2,366,907 | 2,106 |
| **b** Advertising & promotion | **43b** | 84,080,090 | 79,704,026 | 4,143,474 | 232,590 |
| **c** Bank and investment fees | **43c** | 3,503,680 | 8,887 | 3,494,793 | |
| **d** Consulting & professional services | **43d** | 127,278,616 | 112,457,198 | 14,353,952 | 467,466 |
| **e** Data processing | **43e** | 4,666,398 | 3,954,882 | 439,543 | 271,973 |
| **f** Donations | **43f** | 25,836,171 | 23,958,376 | 1,867,015 | 10,780 |
| **g** Dues & subscriptions | **43g** | 1,968,239 | 1,172,519 | 789,449 | 6,271 |
| **h** Insurance | **43h** | 2,191,384 | 287 | 2,191,097 | |
| **i** Miscellaneous | **43i** | 3,007,821 | 2,779,410 | 225,844 | 2,567 |
| **j** Office expense | **43j** | 3,188,125 | 714,854 | 2,471,741 | 1,530 |
| **k** Research surveys & tests | **43k** | 18,463,643 | 15,583,911 | 2,598,891 | 280,841 |
| **l** Software licenses | **43l** | 7,022,406 | 4,577,249 | 2,427,354 | 17,803 |
| **m** Taxes & licenses | **43m** | 8,284,493 | 1,352,994 | 6,931,499 | |
| **n** Technology services | **43n** | 16,819,126 | 11,286,918 | 5,330,992 | 201,216 |
| **o** Volunteer travel and activities | **43o** | 10,544,532 | 9,534,714 | 1,007,558 | 2,260 |
| **p** Member call center | **43p** | 17,737,049 | 17,361,357 | 372,064 | 3,628 |
| **q** Bad debt expense | **43q** | 846,239 | 846,239 | | |

**Form 990, Part III - Program Service Accomplishments:**

| All organizations must describe their exempt purpose achievements in a clear and concise manner. State the number of clients served, publications issued, etc. Discuss achievements that are not measurable. (Section 501 (c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others.) | | Program Service Expenses (Required for 501(c) (3) and (4) orgs., and 4947(a)(1) trusts; but optional for others.) |
|---|---|---|
| a | AARP's 37 million members receive "AARP The Magazine," which is published every other month (bimonthly) in three versions, each of which targets a specific age group members 50-59, members 60-69, and members 70 and over "AARP The Magazine" includes the key areas of health, personal finance, work/life transitions, and personal enrichment All members also receive 11 issues of "AARP Bulletin," a monthly publication (July and August are combined) that reports on such issues as Social Security, Medicare, and those related to work, retirement, pensions, benefits, health, and quality of life "NRTA Live & Learn" is a quarterly publication designed for members who are teachers and educators "AARP Segunda Juventud" is a bimonthly, bilingual publication for Hispanic members of AARP This publication includes profiles of leading Hispanic personalities, articles on new trends in the Hispanic community, and advice for protecting health, managing money, and enjoying leisure time<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 182,038,085 |
| b | Membership Service helps AARP shape its relationship with members by managing the content and quality of member interactions with AARP to ensure that AARP is providing a positive experience and excellent customer service to members through events and exhibits, mail, telephone, Web, and other interactive member touch points AARP provides an interactive Web site and a toll-free call center number, both of which supply members with information on members benefits, services, publications, and programs Memebership Service summarizes AARP's position on activities related to the organization's strategic priorities, as well as the activities that support its strategic plan In 2006, AARP created AARP Global Network LLC to cooperate with organizations representing people 50+ in other countries to promote and deliver social change through joint international commitment to assure that people 50+ are better able to live fulfilling lives with dignity and purpose<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 186,060,775 |
| c | The State Capacity Program has established a Field Office in every state, the District of Columbia, Puerto Rico, and the Virgin Islands These offices coordinate AARP's local efforts and provide a structure that delivers personalized services and programs to members and other older Americans in their homes and communities These offices offer needed assistance, information, and support to older Americans They also fill many of the gaps in services that families, communities, and government are unable to address, enabling older persons to maintain their independence and dignity<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 104,871,566 |
| d | The Membership Development group is dedicated to ensuring that the member experience is valuable, members are satisfied, a relevant portfolio of benefits is available, and strategies for retention and growth are developed and properly carried out Membership Development plans and executes strategies to attract, acquire, and retain members It focuses on both membership as a whole and on specific segments within the membership Key segments include multicultural segments, boomers, AARP's primary age segments (50-59, 60-69, 70 and over), new members, retired educators, and members residing outside of the United States<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 104,791,407 |
| e | Legislative Activities and Public Policy - Through AARP's Federal Affairs group, State Legislative Committee, and AARP/VOTE volunteers, AARP works to raise awareness and advocates for the rights of its members pertaining to the following issues ensuring the solvency of Social Security for current and future retirees while repealing the Social Security earnings limit to provide economic opportunities for older workers, ensuring the long-term solvency of Medicare, including a prescription drug plan, informing members and consumers about Medicare health insurance and related issues, and protecting consumers' financial security from fraudulent telemarketers and Medicare providers and predatory mortgage lenders<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 64,145,746 |
| f | The National Operations and Volunteer Resources - AARP produces a nationwide computerized volunteer referral service that refers prospective volunteers, who are 50 years of age or older, to AARP community programs and selected national organizations or projects compatible with those of the Association AARP Volunteer Resources register volunteers' interests, skills, time requirements, and locations This information is used to fill requests for volunteers by matching the interests and skills of available people to the needs of AARP programs and selected nonprofit organizations nationwide<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 9,413,371 |
| g | Outreach and Services -- AARP researches and identifies certain strategic areas and focuses its activities and resources to develop programs, provide/produce information, and conduct studies on four key issues affecting members health, economic security/work, livable communities, and consumer protection<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 20,279,972 |
| h | The AARP Driver Safety Program helps older drivers maintain their independence by instructing them on safety in the driver's seat The program, which is led by volunteer instructors, teaches participants about the normal changes that occur with aging and how to use this awareness to become safer drivers<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 7,968,423 |
| i | AARP Foundation (cash contributions)<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 19,542,070 |
| j | Annual member event<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 11,769,050 |
| k | International Affairs Office<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 3,746,676 |
| l | Legal Counsel for the Elderly (cash contributions)<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 1,168,505 |
| m | National Retired Teachers Association<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 2,800,718 |
| n | Other programs / Various support services<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 10,939,643 |

**Form 990, Part V-A - Current Officers, Directors, Trustees, and Key Employees:**

| (A) Name and address | (B) Title and average hours per week devoted to position | (C) Compensation (If not paid, enter -0-.) | (D) Contributions to employee benefit plans & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| Mr Erik D Olsen<br>601 E Street NW<br>Washington, DC 20049 | President<br>10 00 | 0 | 0 | 35,324 |
| MS Jennie Chin Hansen RN MS FAAN<br>601 E Street NW<br>Washington, DC 20049 | President-elect<br>1 00 | 0 | 0 | 9,287 |
| Ms Joanne Disch PhD RN FAAN<br>601 E Street NW<br>Washington, DC 20049 | VP-Board of Governance<br>1 00 | 0 | 0 | 6,181 |
| Mr W Lee Hammond<br>601 E Street NW<br>Washington, DC 20049 | VP-SecretaryTreasurer<br>1 00 | 0 | 0 | 10,774 |
| Ms Bonnie M Cramer MSW<br>601 E Street NW<br>Washington, DC 20049 | VP-Membership<br>1 00 | 0 | 0 | 4,290 |
| Mr Yash Aggarwal PhD JD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 11,660 |
| Ms Nelda Barnett<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 15,795 |
| Ms Cora L Christian<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 3,095 |
| Mr Leobardo Estrada PhD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 16,149 |
| Mr William Hall<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 95 |

## Form 990, Part V-A - Current Officers, Directors, Trustees, and Key Employees:

| (A) Name and address | (B) Title and average hours per week devoted to position | (C) Compensation (If not paid, enter -0-.) | (D) Contributions to employee benefit plans & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| Ms Joanne Handy RN MS<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 7,993 |
| Mr Richard Johnson<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 10,912 |
| Ms Mara Mayor PhD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 5,253 |
| Ms Maeona Mendelson PhD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 3,904 |
| Ms N Joyce Payne EdD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 4,175 |
| Mr Clarence Pearson<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 7,885 |
| Mr Robert Romasco MBA<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 9,698 |
| Mr George T Rowan PhD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 1,568 |
| Ms Mary C Scott<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 8,740 |
| Mr Thomas Byron Thames MD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 3,942 |

## Form 990, Part V-A - Current Officers, Directors, Trustees, and Key Employees:

| (A) Name and address | (B) Title and average hours per week devoted to position | (C) Compensation (If not paid, enter -0-.) | (D) Contributions to employee benefit plans & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| Mr F John Zarlengo PhD<br>601 E Street NW<br>Washington, DC 20049 | Director<br>1 00 | 0 | 0 | 11,981 |
| Mr William Novelli<br>601 E Street NW<br>Washington, DC 20049 | Chief Executive Officer<br>57 00 | 1,797,751 | 224,978 | 19,430 |
| Mr Thomas Nelson<br>601 E Street NW<br>Washington, DC 20049 | Chief Operating Officer<br>59 00 | 596,057 | 56,058 | 1,602 |
| Mr Robert R Hagans Jr<br>601 E Street NW<br>Washington, DC 20049 | Chief Financial Officer<br>50 00 | 317,644 | 45,020 | 374 |
| Ms Marie Smith<br>601 E Street NW<br>washington, DC 20049 | President (February 2006)<br>10 00 | 0 | 0 | 3,205 |
| Ms Lavada DeSalles<br>601 E Street NW<br>Washington, DC 20049 | Director (February 2006)<br>1 00 | 0 | 0 | 2,434 |
| Mr Charles Leven<br>601 E Street NW<br>Washington, DC 20049 | VP-Governance (Feb 2006)<br>1 00 | 0 | 0 | 33 |
| Mr Culberto Maldonado<br>601 E Street NW<br>Washington, DC 20049 | Director (February 2006)<br>1 00 | 0 | 0 | 5,450 |
| Ms Mary Jane OGara<br>601 E Street NW<br>Washington, DC 20049 | Director (February 2006)<br>1 00 | 0 | 0 | 2,012 |
| Ms Ladan Manteghi<br>601 E Street NW<br>Washington, DC 20049 | Pres AARP Global Ntwk LLC<br>45 00 | 88,726 | 21,009 | 0 |

**Form 990, Part VI, Line 80b - If "Yes", enter the name of the organization and whether it is exempt or nonexempt:**

| Name of the Organization | Exempt | Nonexempt |
|---|---|---|
| AARP Foundation | X | |
| Legal Counsel for the Elderly | X | |
| AARP Institute | X | |
| AARP Insurance Plan | | X |

## Form 990, Part VI, Line 90a - List the states with which a copy of this return is filed:

| | |
|---|---|
| List the states with which a copy of this return is filed | AL, AK, AZ, AR, CA, CO, CT, DC, FL, GA, IL, KS, KY, ME, MD, MA, MI, MN, MS, MO, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, TN, UT, VA, WA, WV, WI |

## Form 990, Part IX - Information Regarding Taxable Subsidiaries and Disregarded Entities:

| (A) Name, address, and EIN of corporation, partnership, or disregarded entity | (B) Percentage of ownership interest | (C) Nature of activities | (D) Total income | (E) End-of-year assets |
|---|---|---|---|---|
| AARP Financial Services Corporation<br>601 E Street NW<br>Washington, DC20049<br>52-1367607 | 10000 00 % | Real estate holding company | 1,257,340 | 11,712,439 |
| AARP Services Inc (Consolidated)<br>650 F Street NW<br>Washington, DC20004<br>52-2141065 | 10000 00 % | Marketing and research | 138,560,179 | 61,744,399 |
| AARP Properties LLC (disregarded entity included in AARP)<br>601 E Street NW<br>Washington, DC20049<br>95-1985500 | 10000 00 % | Real estate holding company | 399,255 | 146,220,508 |
| AARP 650 F 2-3 LLC (disregarded entity included in AARP)<br>601 E Street NW<br>Washington, DC20049<br>95-1985500 | 10000 00 % | Real estate holding company | 120,461 | 16,401,897 |
| AARP 650 F 4-5 LLC (disregarded entity included in AARP)<br>601 E Street NW<br>Washington, DC20049<br>95-1985500 | 10000 00 % | Real estate holding company | 122,159 | 20,450,659 |
| AARP Carson Place LLC (disregarded entity included in AARP)<br>601 E Street NW<br>Washington, DC20049<br>95-1985500 | 10000 00 % | Real estate holding company | 0 | 22,125,930 |

**Form 990, Part IX - Information Regarding Taxable Subsidiaries and Disregarded Entities:**

| (A) Name, address, and EIN of corporation, partnership, or disregarded entity | (B) Percentage of ownership interest | (C) Nature of activities | (D) Total income | (E) End-of-year assets |
|---|---|---|---|---|
| AARP Watson Plaza LLC (dısregarded entıty ıncluded ın AARP)<br>601 E Street NW<br>Washıngton, DC20049<br>95-1985500 | 10000 00 % | Real estate holdıng company | 0 | 10,412,202 |
| AARP Global Network LLC (dısregarded entıty ıncluded ın AARP)<br>601 E Street NW<br>Washıngton, DC20049<br>20-4499090 | 10000 00 % | Cooperates wıth organızatıons representıng people 50 ın other countrıes | 583,205 | 2,220,271 |

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93490180006057

Form **4562**

Department of the Treasury Internal Revenue Service

# Depreciation and Amortization

**(Including Information on Listed Property)**

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

**2006**

Attachment Sequence No **67**

| Name(s) shown on return | Business or activity to which this form relates | Identifying number |
|---|---|---|
| AARP | Form 990 Page 2 | 95-1985500 |

**Part I** **Election To Expense Certain Property Under Section 179**
***Note:*** *If you have any listed property, complete Part V before you complete Part I.*

| | | |
|---|---|---|
| 1 Maximum amount See the instructions for a higher limit for certain businesses | 1 | $ 108,000 |
| 2 Total cost of section 179 property placed in service (see instructions) | 2 | |
| 3 Threshold cost of section 179 property before reduction in limitation | 3 | $ 430,000 |
| 4 Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0- | 4 | |
| 5 Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions | 5 | |

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

| | | |
|---|---|---|
| 7 Listed property Enter the amount from line 29 | 7 | |
| 8 Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7 | 8 | |
| 9 Tentative deduction Enter the **smaller** of line 5 or line 8 | 9 | |
| 10 Carryover of disallowed deduction from line 13 of your 2005 Form 4562 | 10 | |
| 11 Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions) | 11 | |
| 12 Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11 | 12 | |
| 13 Carryover of disallowed deduction to 2007 Add lines 9 and 10, less line 12 ▶ | 13 | |

**Note:** *Do not use Part II or Part III below for listed property. Instead, use Part V.*

**Part II** **Special Depreciation Allowance and Other Depreciation (Do not** include listed property **)** (See instructions )

| | | |
|---|---|---|
| 14 Special allowance for qualified New York Liberty or Gulf Opportunity Zone property (other than listed property) placed in service during the tax year (see instructions) | 14 | |
| 15 Property subject to section 168(f)(1) election | 15 | |
| 16 Other depreciation (including ACRS) | 16 | 19,668,625 |

**Part III** **MACRS Depreciation (Do not** include listed property.) (See instructions.)

**Section A**

| | | |
|---|---|---|
| 17 MACRS deductions for assets placed in service in tax years beginning before 2006 | 17 | |
| 18 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐ | | |

| (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investment use only—see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
|---|---|---|---|---|---|---|
| 19a 3-year property | | | | | | |
| b 5-year property | | | | | | |
| c 7-year property | | | | | | |
| d 10-year property | | | | | | |
| e 15-year property | | | | | | |
| f 20-year property | | | | | | |
| g 25-year property | | | 25 yrs | | S/L | |
| h Residential rental property | | | 27 5 yrs | MM | S/L | |
| | | | 27 5 yrs | MM | S/L | |
| i Nonresidential real property | | | 39 yrs | MM | S/L | |
| | | | | MM | S/L | |

**Section C—Assets Placed in Service During 2006 Tax Year Using the Alternative Depreciation System**

| | | | | | | |
|---|---|---|---|---|---|---|
| 20a Class life | | | | | S/L | |
| b 12-year | | | 12 yrs | | S/L | |
| c 40-year | | | 40 yrs | MM | S/L | |

**Part IV** **Summary** (see instructions)

| | | |
|---|---|---|
| 21 Listed property Enter amount from line 28 | 21 | |
| 22 **Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations—see instr | 22 | 19,668,625 |
| 23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs | 23 | |

**Part V** **Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)

***Note:*** *For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.*

**Section A—Depreciation and Other Information (Caution:** *See the instructions for limits for passenger automobiles.* **)**

**24a** Do you have evidence to support the business/investment use claimed? Yes No **24b** If "Yes," is the evidence written? Yes No

| (a) Type of property (list vehicles first) | (b) Date placed in service | (c) Business/ investment use percentage | (d) Cost or other basis | (e) Basis for depreciation (business/investment use only) | (f) Recovery period | (g) Method/ Convention | (h) Depreciation/ deduction | (i) Elected section 179 cost |
|---|---|---|---|---|---|---|---|---|
| **25** Special allowance for qualified New York Liberty or Gulf Opportunity Zone property placed in service during the tax year and used more than 50% in a qualified business use (see instructions) | | | | | | 25 | | |
| **26** Property used more than 50% in a qualified business use | | | | | | | | |
| | | % | | | | | | |
| | | % | | | | | | |
| | | % | | | | | | |
| **27** Property used 50% or less in a qualified business use | | | | | | | | |
| | | % | | | | S/L - | | |
| | | % | | | | S/L - | | |
| | | % | | | | S/L - | | |
| **28** Add amounts in column (h), lines 25 through 27 Enter here and on line 21, page 1 | | | | | | 28 | | |
| **29** Add amounts in column (i), line 26 Enter here and on line 7, page 1 | | | | | | | 29 | |

**Section B—Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles

| | (a) Vehicle 1 | | (b) Vehicle 2 | | (c) Vehicle 3 | | (d) Vehicle 4 | | (e) Vehicle 5 | | (f) Vehicle 6 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **30** Total business/investment miles driven during the year (**do not** include commuting miles) | | | | | | | | | | | | |
| **31** Total commuting miles driven during the year | | | | | | | | | | | | |
| **32** Total other personal(noncommuting) miles driven | | | | | | | | | | | | |
| **33** Total miles driven during the year Add lines 30 through 32 | | | | | | | | | | | | |
| **34** Was the vehicle available for personal use | **Yes** | **No** | **Yes** | **No** | **Yes** | **No** | **Yes** | **No** | **Yes** | **No** | **Yes** | **No** |
| during off-duty hours? | | | | | | | | | | | | |
| **35** Was the vehicle used primarily by a more than 5% owner or related person? | | | | | | | | | | | | |
| **36** Is another vehicle available for personal use? | | | | | | | | | | | | |

**Section C—Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **are not** more than 5% owners or related persons (see instructions)

| | **Yes** | **No** |
|---|---|---|
| **37** Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees? | | |
| **38** Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners | | |
| **39** Do you treat all use of vehicles by employees as personal use? | | |
| **40** Do you provide more than five vechicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received? | | |
| **41** Do you meet the requirements concerning qualified automobile demonstration use? (See instructions ) | | |
| **Note:** If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles | | |

**Part VI** **Amortization**

| (a) Description of costs | (b) Date amortization begins | (c) Amortizable amount | (d) Code section | (e) Amortization period or percentage | (f) Amortization for this year |
|---|---|---|---|---|---|
| **42** Amortization of costs that begins during your 2006 tax year (see instructions) | | | | | |
| | | | | | |
| | | | | | |
| **43** Amortization of costs that began before your 2006 tax year | | | | 43 | 52,846 |
| **44 Total.** Add amounts in column (f) See the instructions for where to report | | | | 44 | 52,846 |

# TY 2006 Gain/Loss from Sale of Other Assets Schedule

**Name:** AARP

**EIN:** 95-1985500

| Name | Date Acquired | How Acquired | Date Sold | Purchaser Name | Gross Sales Price | Basis | Sales Expenses | Total (net) | Accumulated Depreciation |
|---|---|---|---|---|---|---|---|---|---|
| Leashold Improvements | 2001-01 | PURCHASED | 2006-12 | AARP Services Inc | 615,604 | 3,397,438 | 0 | 0 | 2,781,834 |
| Furniture and Equipment | 2001-01 | PURCHASED | 2006-12 | AARP Services Inc | 393,007 | 4,065,354 | 0 | 16,000 | 3,688,347 |
| Computer Software | 2001-01 | PURCHASED | 2006-12 | | | 46,477 | 0 | 0 | 46,477 |
| Various Office Equipment | 2001-01 | PURCHASED | 2006-12 | | | 1,000,147 | 0 | -118,459 | 881,688 |

# TY 2006 Gain/Loss from Sale of Public Securities Schedule

| | |
|---|---|
| **Name:** | AARP |
| **EIN:** | 95-1985500 |
| **Gross Sales Price:** | 1,134,479,517 |
| **Basis:** | 1,086,497,256 |
| **Sales Expenses:** | 0 |
| **Total (net):** | 47,982,261 |

# TY 2006 General Explanation Attachment

**Name:** AARP

**EIN:** 95-1985500

| Identifier | Return Reference | Explanation |
|---|---|---|
| Explanation of Compensation Package | Form 990,Page 5,Part V-A Current Officer Information | In 2006, Mr Novelli received a one-time lump-sum cash payment in the amount of $1,205,835 67 for the completion of 5 years of service under his non-vested deferred compensation plan For years 2001-2005, Column D included $176,676 for the amounts allocable to the non-vested deferred compensation plan Mr Novelli has signed an additional 3 year extension of his contract which provides him another non-vested deferred compensation plan For 2006, the amount allocable to the non-vested deferred compensation plan reported in Column D is $173,351 |

# TY 2006 Investments - Other Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Book Value | Cost/FMV |
|---|---|---|
| Investment in subsidiary - AARP Service Inc | 24,945,965 | C |
| Investment in subsidiary - AARP Financial Services Corp | 11,852,432 | C |

# TY 2006 Land etc. Schedule

**Name:** AARP

**EIN:** 95-1985500

| Category/Item | Cost/Other Basis | Accumulated Depreciation | Book Value |
|---|---|---|---|
| Other | 390,529,400 | 121,272,349 | 269,257,051 |

# TY 2006 Mortgages and Notes Payable Schedule

**Name:** AARP
**EIN:** 95-1985500
**Total Mortgage Amount:** 0

| | |
|---|---|
| **Item No.** | 1 |
| **Lender's Name** | AARP headquarters unsecured fixed r |
| **Lender's Title** | |
| **Relationship to Insider** | None |
| **Original Amount of Loan** | 125000000 |
| **Balance Due** | 124037670 |
| **Date of Note** | 2001-05 |
| **Maturity Date** | 2031-05 |
| **Repayment Terms** | maturity date |
| **Interest Rate** | 7.5000 |
| **Security Provided by Borrower** | NA |
| **Purpose of Loan** | Building purchase |
| **Description of Lender Consideration** | None |
| **Consideration FMV** | |

| | |
|---|---|
| **Item No.** | 2 |
| **Lender's Name** | Commerical bank loan |
| **Lender's Title** | |
| **Relationship to Insider** | None |
| **Original Amount of Loan** | 50000000 |
| **Balance Due** | |
| **Date of Note** | 2003-09 |
| **Maturity Date** | 2006-09 |
| **Repayment Terms** | monthly |
| **Interest Rate** | 4.5600 |
| **Security Provided by Borrower** | NA |
| **Purpose of Loan** | Pension plan funding |
| **Description of Lender Consideration** | None |
| **Consideration FMV** | |

| | |
|---|---|
| **Item No.** | 3 |
| **Lender's Name** | AARP Terrell Place unsecured fixed |
| **Lender's Title** | |
| **Relationship to Insider** | None |
| **Original Amount of Loan** | 15000000 |
| **Balance Due** | 15000000 |
| **Date of Note** | 2005-01 |
| **Maturity Date** | 2008-01 |
| **Repayment Terms** | maturity date |
| **Interest Rate** | 5.5100 |
| **Security Provided by Borrower** | NA |
| **Purpose of Loan** | Building purchase |
| **Description of Lender Consideration** | None |
| **Consideration FMV** | |

| | |
|---|---|
| **Item No.** | 4 |
| **Lender's Name** | AARP headquarters building unsecure |
| **Lender's Title** | |
| **Relationship to Insider** | None |
| **Original Amount of Loan** | 75000000 |
| **Balance Due** | 50000000 |
| **Date of Note** | 2001-05 |
| **Maturity Date** | 2031-05 |
| **Repayment Terms** | maturity date |
| **Interest Rate** | 5.4000 |
| **Security Provided by Borrower** | NA |
| **Purpose of Loan** | Building purchase |
| **Description of Lender Consideration** | None |
| **Consideration FMV** | |

| | |
|---|---|
| **Item No.** | 5 |
| **Lender's Name** | AARP Lakewood unsecured fixed rate |
| **Lender's Title** | |
| **Relationship to Insider** | None |
| **Original Amount of Loan** | 16000000 |
| **Balance Due** | 16000000 |
| **Date of Note** | 2006-12 |
| **Maturity Date** | 2007-11 |
| **Repayment Terms** | maturity date |
| **Interest Rate** | 5.5100 |
| **Security Provided by Borrower** | NA |
| **Purpose of Loan** | Building purchase |
| **Description of Lender Consideration** | None |
| **Consideration FMV** | |

# TY 2006 Officer Compensation Schedule

**Name:** AARP

**EIN:** 95-1985500

**Mr Erik D Olsen**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| Program Services | | | |
| Mgmt & General | | | 35,324 |
| Fundraising | | | |

**MS Jennie Chin Hansen RN MS FAA**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 9,287 |
| **Fundraising** | | | |

**Ms Joanne Disch PhD RN FAAN**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 6,181 |
| **Fundraising** | | | |

**Mr W Lee Hammond**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 10,774 |
| **Fundraising** | | | |

**Ms Bonnie M Cramer MSW**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 4,290 |
| **Fundraising** | | | |

**Mr Yash Aggarwal PhD JD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 11,660 |
| **Fundraising** | | | |

**Ms Nelda Barnett**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 15,795 |
| **Fundraising** | | | |

**Ms Cora L Christian**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 3,095 |
| **Fundraising** | | | |

**Mr Leobardo Estrada PhD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 16,149 |
| **Fundraising** | | | |

**Mr William Hall**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 95 |
| **Fundraising** | | | |

**Ms Joanne Handy RN MS**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 7,993 |
| **Fundraising** | | | |

**Mr Richard Johnson**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 10,912 |
| **Fundraising** | | | |

**Ms Mara Mayor PhD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 5,253 |
| **Fundraising** | | | |

**Ms Maeona Mendelson PhD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 3,904 |
| **Fundraising** | | | |

Ms N Joyce Payne EdD

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 4,175 |
| **Fundraising** | | | |

**Mr Clarence Pearson**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 7,885 |
| **Fundraising** | | | |

**Mr Robert Romasco MBA**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 9,698 |
| **Fundraising** | | | |

**Mr George T Rowan PhD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 1,568 |
| **Fundraising** | | | |

**Ms Mary C Scott**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 8,740 |
| **Fundraising** | | | |

**Mr Thomas Byron Thames MD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 3,942 |
| **Fundraising** | | | |

**Mr F John Zarlengo PhD**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 11,981 |
| **Fundraising** | | | |

**Mr William Novelli**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | 1,797,751 | 224,978 | 19,430 |
| **Fundraising** | | | |

**Mr Thomas Nelson**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | 596,057 | 56,058 | 1,602 |
| **Fundraising** | | | |

**Mr Robert R Hagans Jr**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | 317,644 | 45,020 | 374 |
| **Fundraising** | | | |

**Ms Marie Smith**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 3,205 |
| **Fundraising** | | | |

**Ms Lavada DeSalles**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 2,434 |
| **Fundraising** | | | |

**Mr Charles Leven**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 33 |
| **Fundraising** | | | |

**Mr Culberto Maldonado**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 5,450 |
| **Fundraising** | | | |

**Ms Mary Jane OGara**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | | | 2,012 |
| **Fundraising** | | | |

**Ms Ladan Manteghi**

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | 88,726 | 21,009 | |
| **Mgmt & General** | | | |
| **Fundraising** | | | |

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|---|---|---|

# TY 2006 Officer Compensation Schedule

**Name:** AARP

**EIN:** 95-1985500

## Ms Christine Donohoo

| | Compensation | EE Benefit Plans | Expense Acct |
|---|---|---|---|
| **Program Services** | | | |
| **Mgmt & General** | 335,000 | | |
| **Fundraising** | | | |

# TY 2006 Other Assets Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Beginning of Year Amount | End of Year Amount |
|---|---|---|
| Prepaid pension asset | 39,058,193 | 26,305,487 |

# TY 2006 Other Changes in Net Assets Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Amount |
| --- | --- |
| AARP Financial Services Corporation | 280,569 |
| Unrealized market loss on investments held by AARP | -20,685,030 |
| Unrealized market loss on investments held by AARP Insurance Grantor Trust | -909,751 |

# TY 2006 Other Expenses Included Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Amount |
|---|---|
| AARP Financial Services Corporation EIN 52-1367607 | 1,649,021 |
| AARP Services Inc consolidated EIN 52-2141065 | 137,887,927 |
| AARP Foundation EIN 52-0794300 | 133,844,545 |
| AARP Institute EIN 52-0788950 | 14,561 |
| Legal Counsel for the Elderly EIN 52-1194741 | 3,656,108 |
| Consolidation elimination entries | -132,747,317 |

# TY 2006 Other Expenses Not Included Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Amount |
|---|---|
| Investment income treated as expense for financial statement reporting | 7,195,182 |

# TY 2006 Other Liabilities Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Beginning of Year Amount | End of Year Amount |
|---|---|---|
| Post retirement benefits | 70,381,645 | 74,925,029 |
| Deferred membership dues | 138,920,440 | 155,199,537 |
| Book value wrapper contract | 11,200,612 | 18,364,888 |
| Long term deferred income | 76,528 | 1,425 |

# TY 2006 Other Revenues Included Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Amount |
|---|---|
| AARP Financial Services Corporation EIN 52-1367607 | 1,257,340 |
| AARP Services Inc consolidated EIN 52-2141065 | 138,560,179 |
| AARP Foundation EIN 52-0794300 | 148,954,907 |
| AARP Institute EIN 52-0788950 | 143,041 |
| Legal Counsel for the Elderly EIN 52-1194741 | 4,220,391 |
| Consolidation elimination entries | -129,270,917 |

# TY 2006 Other Revenues Not Included Schedule

**Name:** AARP

**EIN:** 95-1985500

| Description | Amount |
|---|---|
| LLC and AARP 650 F 2-3 LLC and AARP 650 F 4-5 LLC | 3,428,121 |
| Total subsidiary income from AARP Services and AARP Financial Services Corp | -280,569 |
| Investment income treated as expense for financial statement reporting | 7,195,182 |