Well Spouse Association

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EIN: 36-3651073
Report Generated on: 09/23/2023

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Well Spouse Association

MISSION

Well Spouse Association, a nonprofit 501(c)(3) membership organization, provides peer support and advocates for people caring for a chronically ill and/or disabled spouse or partner. We offer peer support and educate health care professionals and the general public about the special challenges and unique issues "well" spouses face every day.

EIN
36-3651073

RULING YEAR
1993

IRS SUBSECTION
501(c)(3) Public Charity

FOUNDING YEAR
1998

MAIN ADDRESS
63 W Main St Suite H
Freehold, NJ
07728

AFFILIATION TYPE
Independent Organization

CONTACT
Laurel Wittman, President and Board Member
(703) 861-1282
president@wellspouse.org

PRESIDENT AND BOARD MEMBER
Laurel Wittman

BOARD CHAIR
Bob Mastrogiovanni

SUBJECT AREA
Medical support services
Mental health counseling
Support groups
Human services
Family disability resources

NTEE Code
Nonmonetary Support N.E.C. (P19)
Counseling Support Groups (F60)
Health Support Services (E60)
PROGRAMS

1. WSA Programs and Services
   Population(s) served: Adults, Caregivers, Widows and widowers, People with diseases and illnesses, People with disabilities

POPULATIONS SERVED

1. People with disabilities
2. People with diseases and illnesses

COMPLIANCE

✔ IRS Pub 78 Verified as of September 2023
✔ IRS BMF 509(a)(1) as of September 18, 2023
   Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

✔ Board Practices Reported?
✔ Diversity Data Reported?
Programs & Results

PROGRAMS
Source: Self-Reported by Organization, March 2023

WSA Programs and Services

Population(s) Served: n/a

WSA coordinates a network of peer support groups throughout the US and Canada attended by members who are all spousal caregivers or well spouses.

WSA publishes "Mainstay", a quarterly newsletter circulated to 1,600 people. Mainstay is written by and for our members and is dedicated to the issues faced by well spouses.

We produce and host webinars and symposia on topics of interest to well spouses.

WSA produces an annual National Conference and several regional respite weekends each year.

WSA maintains an active social media presence for 24x7 support and for people who cannot attend our events. This includes our website, which hosts an online forum for members, an active Facebook group, a Reddit subreddit, and a Twitter feed.

WSA also provides continuing support for members whose spouses have died.
CHARTING IMPACT

What is the organization aiming to accomplish?

Well Spouse Association provides support and resources to people of all ages who care for partners with chronic illness or disability. We provide support whether you identify as a caregiver or not. The diagnosis doesn't matter to us, and you don't even need to know the diagnosis at all. What matters is that you feel you need support from a community of people who understand. We are an inclusive and welcoming community – no matter your age, partnership arrangement, sexuality, orientation, gender, or religious beliefs.
Financials

**FISCAL YEAR START:** 01/01  **FISCAL YEAR END:** 12/31

### Revenue & Expenses

#### Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$142,416</td>
</tr>
<tr>
<td>Program Services</td>
<td>$7,220</td>
</tr>
<tr>
<td>Investments</td>
<td>$1,731</td>
</tr>
<tr>
<td>Special Events</td>
<td>$0</td>
</tr>
<tr>
<td>Sales</td>
<td>$0</td>
</tr>
<tr>
<td>Other</td>
<td>$11,992</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>$163,359</td>
</tr>
</tbody>
</table>

#### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$0</td>
</tr>
<tr>
<td>Salaries &amp; Employee Benefits</td>
<td>$29,313</td>
</tr>
<tr>
<td>Professional Fees</td>
<td>$100</td>
</tr>
<tr>
<td>Occupancy</td>
<td>$5,797</td>
</tr>
<tr>
<td>Printing, Publications, Postage, etc.</td>
<td>$2,246</td>
</tr>
<tr>
<td>Other Expenses</td>
<td>$26,839</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$64,295</td>
</tr>
</tbody>
</table>

#### Net Gain/Loss

Net Gain/Loss: $99,064

### Balance Sheet

#### Assets

<table>
<thead>
<tr>
<th>Category</th>
<th>1/1/2022</th>
<th>12/31/2022</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Equivalent</td>
<td>$109,716</td>
<td>$208,869</td>
<td>$99,153</td>
</tr>
<tr>
<td>Fixed Assets (LBE - Depreciation)</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Other</td>
<td>$850</td>
<td>$850</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$110,566</td>
<td>$209,719</td>
<td>$99,153</td>
</tr>
</tbody>
</table>

#### Liabilities

<table>
<thead>
<tr>
<th>Category</th>
<th>1/1/2022</th>
<th>12/31/2022</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Liabilities</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>

#### Fund Balance

<table>
<thead>
<tr>
<th>Category</th>
<th>1/1/2022</th>
<th>12/31/2022</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Assets:</td>
<td>$110,566</td>
<td>$209,719</td>
<td>$99,153</td>
</tr>
</tbody>
</table>

[Key Revenue & Expense Data from Form 990](#)
[Key Balance Sheet Data from Form 990](#)
Operations

Source: Self-Reported by Organization, March 2023

PRESIDENT AND BOARD MEMBER

Laurel Wittman

Laurel joined WSA as a member in 2014 and joined the Board in 2020 to focus on outreach for younger well spouses. She was elected President in 2021. She and her husband Eduardo have been married for 16 years. Eddie was diagnosed with MS in 1998 at the age of 24, and his disease course has been aggressive. Laurel has been a venture lender with Oxford Finance LLC since 2004, providing loan facilities to biotech, pharmaceutical, and medical device companies in the US, Canada, and Europe. Prior nonprofit Board experience includes serving as Treasurer for CLAW USA, a non-profit alliance of theatrical lady arm wrestlers focused on social justice, for two years. She has a BS in Commerce with a concentration in Finance from the University of Virginia and was a member of Beta Gamma Sigma, the academic honor society for business students.

BOARD CHAIR

Bob Mastrogiovanni
No affiliation
Term: 2021 - 2023

BOARD MEMBERS

Terri Corcoran
No Affiliation
Donna Amato
No Affiliation
Gerald Bishop
No Affiliation
Lawrence Bocchieri III
No Affiliation
Robert Mastrogiovanni
No Affiliation
Al Kozin
Barry Appelbaum
Jane Lupo
Laurel Wittman
Rona Auster
Sheldon Friedman
Carol Christofero-Snider
John Camp
Tatiana Durbak
### Officers Directors, Trustees, Key Employees

**FISCAL YEAR 2022**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Benefits/Deferred Compensation</th>
<th>Expense Account, Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Mastrogiovanni</td>
<td>Board Chair and Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Al Kozin</td>
<td>Assistant Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Terri Corcoran</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Laurel Wittman</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
### Officers Directors, Trustees, Key Employees

**FISCAL YEAR 2021**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Benefits/Deferred Compensation</th>
<th>Expense Account, Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Mastrogiovanni</td>
<td>Board Chair and Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Al Kozin</td>
<td>Assistant Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Terri Corcoran</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Laurel Wittman</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
### Officers, Directors, Trustees, Key Employees

**FISCAL YEAR 2020**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Benefits/Deferred Compensation</th>
<th>Expense Account, Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Mastrogiovanni</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Al Kozin</td>
<td>Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Terri Corcoran</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Larry Bocchierre</td>
<td>Board Chair</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
### Officers, Directors, Trustees, Key Employees

#### FISCAL YEAR 2019

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Benefits/Deferred Compensation</th>
<th>Expense Account, Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Mastrogiavanni</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Al Kozin</td>
<td>Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Terri Corcoran</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Larry Bocchierre</td>
<td>Board Chair</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>
### Officers Directors, Trustees, Key Employees

**FISCAL YEAR 2018**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Benefits/Deferred Compensation</th>
<th>Expense Account, Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Mastrogiovanni</td>
<td>President</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Al Kozin</td>
<td>Treasurer</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Terri Corcoran</td>
<td>Secretary</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Larry Bocchierre</td>
<td>Board Chair</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Dorothy Saunders</td>
<td>Past president</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
BOARD LEADERSHIP PRACTICES

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

BOARD ORIENTATION & EDUCATION
Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?  
No

CEO OVERSIGHT
Has the board conducted a formal, written assessment of the chief executive within the past year?  
No

ETHICS & TRANSPARENCY
Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?  
No

BOARD COMPOSITION
Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?  
Yes

BOARD PERFORMANCE
Has the board conducted a formal, written self-assessment of its performance within the past three years?  
No
Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

The organization’s leader identifies as:

- **Race & Ethnicity**: White/Caucasian/European
- **Gender Identity**: Female, Not transgender (cisgender)
- **Sexual Orientation**: Heterosexual or Straight
- **Disability Status**: Person without a disability

### Race & Ethnicity

*No data*

### Gender Identity

<table>
<thead>
<tr>
<th>Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Female**: 100%
- **Male**: 0%
- **Non-binary**: 0%
- **Unknown or decline to state**: 0%

### Sexual Orientation

<table>
<thead>
<tr>
<th>Board Members</th>
<th>Senior Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Gay, Lesbian, Bisexual**: 100%
- **Heterosexual or Straight**: 0%
- **Unknown or decline to state**: 0%

### Disability

*No data.*

*We do not display staff or senior staff disability information for organizations with fewer than 15 staff.*
# Appendix

**Key Documents**

<table>
<thead>
<tr>
<th>IRS Forms 990</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2020 990</td>
<td></td>
</tr>
<tr>
<td>2019 990</td>
<td></td>
</tr>
<tr>
<td>2018 990</td>
<td></td>
</tr>
<tr>
<td>2017 990</td>
<td></td>
</tr>
<tr>
<td>2016 990</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IRS Forms 990T</th>
<th>Not Available</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Audited Financial Statements</th>
<th>Not Available</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Key Organization Documents</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter of Determination</td>
<td></td>
</tr>
<tr>
<td>2008 Annual Report</td>
<td></td>
</tr>
<tr>
<td>2007 Annual Report</td>
<td></td>
</tr>
<tr>
<td>Key Revenue &amp; Expense Data from Form 990</td>
<td></td>
</tr>
<tr>
<td>Key Balance Sheet Data from Form 990</td>
<td></td>
</tr>
</tbody>
</table>
Well Spouse Association
63 W Main St Suite H
Freehold, NJ 07728

✔ Foundation Status Code: PC*
✔ Public charity described in section 509(a)(1) or (2)

IRS Publication 78 Details

Organization name
Well Spouse Association

Location
Freehold, NJ

Most recent IRS Publication 78
September 2023

Verified with most recent Internal Revenue Bulletin
September 18, 2023

IRS Business Master File Details

Organization name
WELL SPOUSE ASSOCIATION

Most recent IRS BMF
September 18 2023

Reason for Non-Private Foundation Status
Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

EIN
36-3651073

IRS subsection
This organization is a 501(c)(3) Public Charity

Ruling date
04/1993

This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization. Learn more

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which ‘type’ can’t be determined).

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee’s public charity classification under section 509(a)(1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.
- IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.
- IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.
- IRS Business Master File lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- IRS Automatic Revocation of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked due to failure to file an annual return or notice with the IRS for three consecutive years.
- The Foundation Status Code is a value derived by mapping the codes found on the 990PF filing instructions to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.
- The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list contains organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.

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