Form **8868** 

(Rev. January 2022)

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

OMB No. 1545-0047

File a separate application for each return. Department of the Treasury ► Go to www.irs.gov/Form8868 for the latest information. Internal Revenue Service 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/e-file-providers/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. Type or Name of exempt organization or other filer, see instructions. Taxpayer identification number (TIN) print THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 File by the Number, street, and room or suite no. If a P.O. box, see instructions. filing your 510 WALNUT STREET, 1700 return. See City, town or post office, state, and ZIP code. For a foreign address, see instructions. instructions PHILADELPHIA, PA 19106 Enter the Return Code for the return that this application is for (file a separate application for each return) **Application** Return **Application** Return Is For Is For Code Code Form 990 or Form 990-EZ Form 1041-A 01 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 12 Form 990-T (trust other than above) 06 Form 8870 Form 990-T (corporation) VINCENT MANDES -510 WALNUT STREET, SUITE 1700 - The books are in the care of ➤ PHILADELPHIA, PA 19106-3699 Telephone No. ▶ (215) 446-3500 Fax No. 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 . If it is for part of the group, check this box 🕨 🔙 and attach a list with the names and TINs of all members the extension is for. MAY 15, 2024 \_\_\_\_, to file the exempt organization return for I request an automatic 6-month extension of time until the organization named above. The extension is for the organization's return for: calendar year or , and ending JUN 30, 2023 Initial return Final return If the tax year entered in line 1 is for less than 12 months, check reason: Change in accounting period If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less 0. any nonrefundable credits. See instructions. 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 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. Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment

For Privacy Act and Paperwork Reduction Act Notice, see instructions. LHA

Form 8868 (Rev. 1-2022)

instructions

## **Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) Do not enter social security numbers on this form as it may be made public.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Go to www.irs.gov/Form990 for instructions and the latest information.

| A F                     | or the                   | $^\circ$ 2022 calendar year, or tax year beginning $$ JUL $1,$ $2022$ and $6$  | ending J    | UN 30, 2023                         |                               |
|-------------------------|--------------------------|--|-------------|-------------------------------------|-------------------------------|
| <b>B</b> c              | heck if<br>pplicable     | C Name of organization   |             | D Employer identifi                 | cation number                 |
|                         | Addres                   | THE AMERICAN BOARD OF INTERNAL MEDICINI  | E           |                                     |                               |
|                         | Name                     |  |             | 39-08662                            | 28                            |
|                         | Initial<br>return        | T  | Room/suite  | E Telephone numbe                   |                               |
|                         | Final return/            | 510 WALNUT STREET  | L700        | (215) 44                            |                               |
|                         | termin<br>ated           | ,  |             | G Gross receipts \$                 | 90,037,895.                   |
|                         | Ameno<br>return          | PHILADELPHIA, PA 19100   |             | H(a) Is this a group re             |                               |
|                         | Applic<br>tion<br>pendir | F Name and address of principal officer: KICHARD 0. BARON  |             | for subordinates                    | =                             |
|                         |                          | SAME AS C ABOVE  |             | <b>H(b)</b> Are all subordinates in |                               |
|                         |                          | empt status: X 501(c)(3) 501(c) ( ) (insert no.) 4947(a)(1) o  | r 527       | 1                                   | list. See instructions        |
|                         | Vebsit                   |  | 1. 1/       | H(c) Group exemption                |                               |
|                         | orm of<br>I <b>rt I</b>  | organization: X Corporation Trust Association Other  Summary   | L Year      | of formation: 1930                  | M State of legal domicile: IA |
|                         |                          | Briefly describe the organization's mission or most significant activities: SEE S  | CHEDII      | T.E. O                              |                               |
| çe                      | 1                        | Briefly describe the organization's mission or most significant activities.  | CHEDO       | пв О.                               |                               |
| nan                     | 2                        | Check this box if the organization discontinued its operations or dispose  | ed of more  | than 25% of its net ass             | sets                          |
| Ver                     |                          |  |             | 3                                   | 14                            |
| ဗိ                      |                          | Number of independent voting members of the governing body (Part VI, line 1b)  |             |                                     | 0                             |
| Activities & Governance |                          | Total number of individuals employed in calendar year 2022 (Part V, line 2a)   |             |                                     | 283                           |
|                         |                          | Total number of volunteers (estimate if necessary)   |             |                                     | 0                             |
|                         |                          | Total unrelated business revenue from Part VIII, column (C), line 12   |             |                                     | 0.                            |
| <u> </u>                | b                        | Net unrelated business taxable income from Form 990-T, Part I, line 11   |             | 7b                                  | 0.                            |
|                         |                          |  |             | Prior Year                          | Current Year                  |
| ē                       |                          | Contributions and grants (Part VIII, line 1h)  |             | 0.                                  | 0.                            |
| Revenue                 |                          | Program service revenue (Part VIII, line 2g)   |             | 71,420,510.                         |                               |
| Rev                     |                          | Investment income (Part VIII, column (A), lines 3, 4, and 7d)  |             | 94,242.                             | 2,337,763.                    |
|                         |                          | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)   |             | 582,301.<br>72,097,053.             | 538,439.                      |
|                         |                          | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)   |             | 0.                                  | 90,037,895.                   |
|                         |                          | Grants and similar amounts paid (Part IX, column (A), lines 1-3)   |             | 0.                                  | 0.                            |
| <u>"</u>                | 45                       | Benefits paid to or for members (Part IX, column (A), line 4)  Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) |             | 30,136,126.                         |                               |
| Expenses                | 162                      | Professional fundraising fees (Part IX, column (A), line 11e)  |             | 0.                                  | 0.                            |
| en                      | h                        | Total fundraising expenses (Part IX, column (D), line 25)  | 0.          | <u> </u>                            | J.                            |
| $\overline{\mathbf{x}}$ | 17                       | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)   |             | 27,861,963.                         | 28,527,678.                   |
|                         |                          | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)  |             | 57,998,089.                         |                               |
|                         | 19                       | Revenue less expenses. Subtract line 18 from line 12   |             | 14,098,964.                         | 27,073,294.                   |
| 200                     | 20<br>21<br>22           |  | Ве          | ginning of Current Year             | End of Year                   |
| sets                    | 20                       | Total assets (Part X, line 16)   |             | .00,798,312.                        | 180,024,456.                  |
| t As                    | 21                       | Total liabilities (Part X, line 26)  |             | 06,968,739.                         |                               |
| 캺                       | 22                       | Net assets or fund balances. Subtract line 21 from line 20   |             | -6,170,427.                         | 20,890,140.                   |
|                         | rt II                    | Signature Block  |             |                                     |                               |
|                         |                          | Ities of perjury, I declare that I have examined this return, including accompanying schedules   |             | •                                   | / knowledge and belief, it is |
| true,                   | correc                   | r, amcPosHहोभणस्य Declaration of preparer (other than officer) is based on all information of whi  | cn preparer | 4/17/2024                           | 1                             |
| Cia.                    | _                        | Vincent Mandes Signature of officer —BA31CF2411224F1   |             | Date                                | 1                             |
| Sign<br>Her             |                          | VINCENT MANDES, SENIOR VICE PRESIDENT/CFO  |             |                                     |                               |
| Her                     | •                        | Type or print name and title   |             |                                     |                               |
|                         |                          | Print/Type preparer's name Preparer's signature  | 1           | Date Check                          | PTIN                          |
| Paid                    |                          | CONNIE M. LIRA CONNIE M. LIRA  | lo          | 4/16/24 if self-employ              | P00481097                     |
|                         | arer                     | Firm's name CLIFTONLARSONALLEN LLP   |             |                                     | 1-0746749                     |
|                         | Only                     | Firm's address 150 S WARNER ROAD, SUITE 310  |             |                                     |                               |
|                         |                          | KING OF PRUSSIA, PA 19406  |             | Phone no. ( 2                       | 15) 643-3900                  |
|                         |                          | RS discuss this return with the preparer shown above? See instructions   |             |                                     | X Yes No                      |

|     | 1990 (2022) THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 Page 2 Till Statement of Program Service Accomplishments                      |
|-----|--|
| Pai |  |
| _   | <del></del>  |
| 1   | Briefly describe the organization's mission:  SEE SCHEDULE O.  |
|     | DEE DEMEDULE O.  |
|     |  |
|     |  |
| 2   | Did the organization undertake any significant program services during the year which were not listed on the                                 |
| _   | prior Form 990 or 990-EZ?  |
|     | If "Yes," describe these new services on Schedule O.   |
| 3   | Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes X No                       |
|     | If "Yes," describe these changes on Schedule O.  |
| 4   | Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.         |
|     | Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and |
|     | revenue, if any, for each program service reported.  |
| 4a  | (Code:) (Expenses \$19,852,696 • including grants of \$0 • (Revenue \$37,237,983 • )   |
|     | ABIM BOARD CERTIFICATION DEMONSTRATES THAT PHYSICIANS HAVE COMPLETED   |
|     | INTERNAL MEDICINE AND SUBSPECIALTY TRAINING AND HAVE MET RIGOROUS  |
|     | STANDARDS THROUGH INTENSIVE STUDY, SELF-ASSESSMENT AND EVALUATION.   |
|     | ADDITIONALLY, CERTIFICATION ENCOMPASSES THE SIX GENERAL COMPETENCIES   |
|     | ESTABLISHED BY THE ACCREDITATION COUNCIL FOR GRADUATE MEDICAL EDUCATION  |
|     | (ACGME) AND SETS THE STAGE FOR CONTINUAL PROFESSIONAL DEVELOPMENT  |
|     | THROUGH VALUES CENTERED ON LIFELONG LEARNING.  |
|     |  |
|     | CONTINUED ON SCHEDULE O.   |
|     |  |
|     |  |
|     | 21 074 405   |
| 4b  | (Code:) (Expenses \$ 31,074,405. including grants of \$ 0. (Revenue \$ 50,434,453.)  |
|     | ABIM'S MAINTENANCE OF CERTIFICATION (MOC) CREDENTIAL MEANS SOMETHING   |
|     | DIFFERENT FROM INITIAL CERTIFICATION. IT SPEAKS TO THE QUESTION OF WHETHER OR NOT AN INTERNIST IS STAYING CURRENT WITH KNOWLEDGE AND         |
|     | PRACTICE IN HIS/HER DISCIPLINE. ABIM ISSUES A BINARY CONSEQUENTIAL MOC   |
|     | CREDENTIAL THAT IS ANCHORED IN WHETHER A PHYSICIAN IS MEETING A  |
|     | PERFORMANCE STANDARD. ABIM ISSUES THAT CREDENTIAL BASED UPON OBJECTIVE,  |
|     | FAIR, DEFENSIBLE PSYCHOMETRICALLY RIGOROUS STANDARDS. PARTICIPATION IN   |
|     | MOC MEANS THAT A PHYSICIAN IS DEMONSTRATING THAT S/HE IS ENGAGED IN  |
|     | CERTAIN CONTINUOUS LEARNING AND EDUCATION ACTIVITIES.  |
|     | CHAININ CONTINUOUS EMMAINO IND EDUCATION HOTEVILLES.   |
|     | CONTINUED ON SCHEDULE O.   |
|     |  |
| 4c  | (Code:) (Expenses \$   |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
| 4d  | Other program services (Describe on Schedule O.)   |
|     | (Expenses \$ including grants of \$ ) (Revenue \$ )  |
| 4e  | Total program service expenses 50,927,101.   |

## Part IV | Checklist of Required Schedules

|            |   |     | Yes | No          |
|------------|---|-----|-----|-------------|
| 1          | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?   |     |     |             |
|            | If "Yes," complete Schedule A   | 1   | Х   |             |
| 2          | Is the organization required to complete Schedule B, Schedule of Contributors? See instructions   | 2   |     | Х           |
| 3          | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for   |     |     |             |
|            | public office? If "Yes," complete Schedule C, Part I  | 3   |     | Х           |
| 4          | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect  |     |     |             |
|            | during the tax year? If "Yes," complete Schedule C, Part II   | 4   |     | Х           |
| 5          | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or  |     |     |             |
| _          | similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III   | 5   |     | х           |
| 6          | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to   |     |     |             |
| •          | provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I  | 6   |     | x           |
| 7          | Did the organization receive or hold a conservation easement, including easements to preserve open space,   | _   |     |             |
| •          | the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II  | 7   |     | x           |
| 8          | Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If</i> "Yes," <i>complete</i>  |     |     | <del></del> |
| 0          | , ,   | 8   |     | x           |
| •          | Schedule D, Part III  | -   |     |             |
| 9          | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for   |     |     |             |
|            | amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?   |     |     | x           |
|            | If "Yes," complete Schedule D, Part IV  | 9   |     | <u> </u>    |
| 10         | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments  |     |     | <b>.</b>    |
|            | or in quasi endowments? If "Yes," complete Schedule D, Part V   | 10  |     | X           |
| 11         | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X,   |     |     |             |
|            | as applicable.  |     |     |             |
| а          | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,   |     |     |             |
|            | Part VI   | 11a | X   |             |
| b          | Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total  |     |     |             |
|            | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII   | 11b |     | X           |
| С          | Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total   |     |     |             |
|            | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII  | 11c |     | <u> </u>    |
| d          | Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in   |     |     |             |
|            | Part X, line 16? If "Yes," complete Schedule D, Part IX   | 11d | X   |             |
| е          | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X   | 11e | X   |             |
| f          | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses   |     |     |             |
|            | the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X  | 11f | Х   |             |
| 12a        | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete   |     |     |             |
|            | Schedule D, Parts XI and XII  | 12a |     | X           |
| b          | Was the organization included in consolidated, independent audited financial statements for the tax year?   |     |     |             |
|            | If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional   | 12b | X   |             |
| 13         | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E   | 13  |     | X           |
| 14a        | Did the organization maintain an office, employees, or agents outside of the United States?   | 14a | X   |             |
| b          | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,   |     |     |             |
|            | investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000  |     |     |             |
|            | or more? If "Yes," complete Schedule F, Parts I and IV  | 14b | X   |             |
| 15         | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any   |     |     |             |
|            | foreign organization? If "Yes," complete Schedule F, Parts II and IV  | 15  |     | Х           |
| 16         | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to  |     |     |             |
|            | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV   | 16  |     | Х           |
| 17         | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,   |     |     |             |
|            | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions  | 17  |     | x           |
| 18         | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines  |     |     |             |
|            | 1c and 8a? If "Yes," complete Schedule G, Part II   | 18  |     | x           |
| 19         | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"  |     |     |             |
|            | complete Schedule G, Part III   | 19  |     | x           |
| 20a        | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H   | 20a |     | X           |
|            | TOWN THE PLANT OF | 20a |     | <del></del> |
| 21         | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or   | 200 |     |             |
| <b>4</b> 1 | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II   | 21  |     | x           |
|            | domocio government orti artix, comunin (-), inte 1: II Tes. Complete Schedule I, Parts I and II   | 41  |     |             |

## Form 990 (2022) THE AMERICAN BOARD OF INTERNAL MEDICINE

39-0866228

Page **4** 

| Pai               | Crecklist of Required Schedules (continued)   |     |      |  |
|-------------------|---|-----|------|--|
|                   |   |     | Yes  | No   |
| 22                | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on                   |     |      |  |
|                   | Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III   | 22  |      | X  |
| 23                | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current     |     |      |  |
|                   | and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete                  |     |      |  |
|                   | Schedule J  | 23  | Х    |  |
| 24 2              | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the         |     |      |  |
| 2 <del>-1</del> a |   |     |      |  |
|                   | last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete              | 04- |      | x  |
|                   | Schedule K. If "No," go to line 25a   | 24a |      |  |
|                   | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?                               | 24b |      | ├  |
| С                 | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease            |     |      |  |
|                   | any tax-exempt bonds?   | 24c |      |  |
| d                 | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?                         | 24d |      | <u> </u>   |
| 25 a              | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit                    |     |      |  |
|                   | transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I                                   | 25a |      | X  |
| b                 | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and      |     |      |  |
|                   | that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete           |     |      |  |
|                   | Schedule L. Part I  | 25b |      | Х  |
| 26                | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current                 |     |      |  |
| 2.5               | or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%                         |     |      |  |
|                   | controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II                              | 26  |      | x  |
| 27                | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,     |     |      |  |
|                   | creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled     |     |      |  |
|                   |   | 07  |      | X  |
| 00                | entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III        | 27  |      |  |
| 28                | Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV,          |     |      |  |
|                   | instructions for applicable filing thresholds, conditions, and exceptions):   |     |      |  |
| а                 | A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If                |     |      | ٠,,  |
|                   | "Yes," complete Schedule L, Part IV   | 28a |      | X  |
|                   | A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV                                 | 28b |      | X  |
| С                 | A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If                        |     |      |  |
|                   | "Yes," complete Schedule L, Part IV   | 28c |      | X  |
| 29                | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M                        | 29  |      | X  |
| 30                | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation     |     |      |  |
|                   | contributions? If "Yes," complete Schedule M  | 30  |      | Х  |
| 31                | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I              | 31  |      | Х  |
| 32                | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete                |     |      |  |
|                   | ,   | 32  |      | X  |
| 33                | Schedule N, Part II  Did the organization own 100% of an entity disregarded as separate from the organization under Regulations |     |      |  |
|                   | sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I   | 33  |      | x  |
| 34                | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and       |     |      | <del></del>                                      |
| J-4               |   | 24  | Х    |  |
| 2F ~              | Part V, line 1  | 34  | X    | $\vdash$   |
|                   | Did the organization have a controlled entity within the meaning of section 512(b)(13)?   | 35a | - 71 | <del>                                     </del> |
| a                 | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity       | ٠   | Х    |  |
| 00                | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2   | 35b |      | <del>                                     </del> |
| 36                | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?      |     |      |  |
|                   | If "Yes," complete Schedule R, Part V, line 2   | 36  |      | X  |
| 37                | Did the organization conduct more than 5% of its activities through an entity that is not a related organization                |     |      |  |
|                   | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI                    | 37  |      | X  |
| 38                | Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?                  |     |      |  |
|                   | Note: All Form 990 filers are required to complete Schedule O   | 38  | X    |  |
| Pai               |   |     |      | _  |
|                   | Check if Schedule O contains a response or note to any line in this Part V  |     |      | $\Box$   |
|                   |   |     | Yes  | No   |
|                   | Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable  |     |      |  |
| b                 | Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable   |     |      |  |
| С                 | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming              |     |      |  |
|                   | (gambling) winnings to prize winners?   | 1c  |      |  |
|                   |   |     | aan  | (0000)   |

Form 990 (2022)

#### THE AMERICAN BOARD OF INTERNAL MEDICINE

39-0866228

Page 5

Statements Regarding Other IRS Filings and Tax Compliance Part V Yes No 2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, 283 filed for the calendar year ending with or within the year covered by this return Х b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? 2h X Did the organization have unrelated business gross income of \$1,000 or more during the year? If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O 3b At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a Х financial account in a foreign country (such as a bank account, securities account, or other financial account)? 4a **b** If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). 5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? 5a X Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? If "Yes" to line 5a or 5b, did the organization file Form 8886-T? 5c 6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? Х 6a b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 6b 7 Organizations that may receive deductible contributions under section 170(c). Х Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? 7a If "Yes," did the organization notify the donor of the value of the goods or services provided? 7b Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required Х to file Form 8282? 7c If "Yes," indicate the number of Forms 8282 filed during the year Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 7e Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? 7g If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? 8 9 Sponsoring organizations maintaining donor advised funds. Did the sponsoring organization make any taxable distributions under section 4966? 9a Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? 9b 10 Section 501(c)(7) organizations. Enter: Initiation fees and capital contributions included on Part VIII, line 12 Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities Section 501(c)(12) organizations. Enter: Gross income from members or shareholders 11a Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) 12a 12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? **b** If "Yes," enter the amount of tax-exempt interest received or accrued during the year Section 501(c)(29) qualified nonprofit health insurance issuers. Is the organization licensed to issue qualified health plans in more than one state? 13a Note: See the instructions for additional information the organization must report on Schedule O. Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans c Enter the amount of reserves on hand Х Did the organization receive any payments for indoor tanning services during the tax year? If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? Х 15 If "Yes," see the instructions and file Form 4720, Schedule N. Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O. Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? 17 If "Yes," complete Form 6069.

THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 Form 990 (2022) Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions. X Check if Schedule O contains a response or note to any line in this Part VI Section A. Governing Body and Management Yes No **1a** Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O. 0 **b** Enter the number of voting members included on line 1a, above, who are independent Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other X officer, director, trustee, or key employee? 2 Did the organization delegate control over management duties customarily performed by or under the direct supervision 3 of officers, directors, trustees, or key employees to a management company or other person? 3 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? 4 Did the organization become aware during the year of a significant diversion of the organization's assets? Did the organization have members or stockholders? 6 Х 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? Х 7a **b** Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? 7b Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body? 8a **b** Each committee with authority to act on behalf of the governing body? 8b Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes." provide the names and addresses on Schedule O Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

| 10a | Did the organization have local chapters, branches, or affiliates?   | 10a |   | Х |
|-----|--|-----|---|---|
| b   | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,   |     |   |   |
|     | and branches to ensure their operations are consistent with the organization's exempt purposes?                              | 10b |   |   |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?  | 11a | Х |   |
| b   | Describe on Schedule O the process, if any, used by the organization to review this Form 990.                                |     |   |   |
| 12a | Did the organization have a written conflict of interest policy? If "No," go to line 13                                      | 12a | Х |   |
| b   |  | 12b | X |   |
| С   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe           |     |   |   |
|     | on Schedule O how this was done  | 12c | Х |   |
| 13  | Did the organization have a written whistleblower policy?  | 13  | Х |   |
| 14  | Did the organization have a written document retention and destruction policy?   | 14  | Х |   |
| 15  | Did the process for determining compensation of the following persons include a review and approval by independent           |     |   |   |
|     | persons, comparability data, and contemporaneous substantiation of the deliberation and decision?                            |     |   |   |
| а   | The organization's CEO, Executive Director, or top management official   | 15a | Х |   |
| b   | Other officers or key employees of the organization  | 15b | Х |   |
|     | If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.   |     |   |   |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a        |     |   |   |
|     | taxable entity during the year?  | 16a |   | X |
| b   | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation |     |   |   |
|     | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's               |     |   |   |
|     | exempt status with respect to such arrangements?   | 16b |   |   |

#### Section C. Disclosure

|    | don o. Disolosare  |
|----|--|
| 17 | List the states with which a copy of this Form 990 is required to be filed NONE  |
| 18 | Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available |
|    | for public inspection. Indicate how you made these available. Check all that apply.  |
|    | X Own website Another's website X Upon request Other (explain on Schedule O)   |
| 19 | Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial        |
|    | statements available to the public during the tax year.  |

State the name, address, and telephone number of the person who possesses the organization's books and records VINCENT MANDES - (215) 446-3500

510 WALNUT STREET, SUITE 1700, PHILADELPHIA

990 (2022) THE AMERICAN BOARD OF INTERNAL MEDICINE

39-0866228

<u> Page</u> **7** 

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

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

X

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

   List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation.
- Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See the instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations. See the instructions for the order in which to list the persons above.

| Check this box if neither the organization | nor any related     | orga                           | niza                  | tion    | con          | nper                            | sate   | ed any current officer, di | rector, or trustee.              |                        |
|--|---------------------|--------------------------------|-----------------------|---------|--------------|---------------------------------|--------|----------------------------|----------------------------------|------------------------|
| (A)  | (B)                 |                                |                       |         | <b>C</b> )   |                                 |        | (D)                        | (E)                              | (F)                    |
| Name and title                             | Average             | (do                            | not c                 | Posi    |              |                                 | one    | Reportable                 | Reportable                       | Estimated              |
|  | hours per           | box                            | , unle:<br>cer ar     | ss per  | rson i       | s both                          | n an   | compensation               | compensation                     | amount of              |
|  | week                |                                | Cer ai                | iu a u  | recto        | i / ii us                       | iee)   | from                       | from related                     | other                  |
|  | (list any hours for | irecto                         |                       |         |              |                                 |        | the organization           | organizations<br>(W-2/1099-MISC/ | compensation from the  |
|  | related             | e or c                         | stee                  |         |              | sated                           |        | (W-2/1099-MISC/            | 1099-NEC)                        | organization           |
|  | organizations       | Individual trustee or director | Institutional trustee |         | yee          | Highest compensated<br>employee |        | 1099-NEC)                  | 1000 (120)                       | and related            |
|  | below               | idual                          | ution                 | e       | Key employee | est co<br>oyee                  | er     | <b>'</b>                   |                                  | organizations          |
|  | line)               | Indiv                          | Instit                | Officer | Key 6        | High<br>empl                    | Former |                            |                                  |                        |
| (1) RICHARD J. BARON                       | 32.00               |                                |                       |         |              |                                 |        |                            |                                  |                        |
| PRESIDENT/CEO                              | 8.00                | Х                              |                       | Х       |              |                                 |        | 895,350.                   | 223,838.                         | 266,375.               |
| (2) RICHARD BATTAGLIA                      | 40.00               |                                |                       |         |              |                                 |        |                            |                                  |                        |
| CHIEF MEDICAL OFFICER                      | 0.00                |                                |                       |         | Х            |                                 |        | 458,872.                   | 0.                               | 100,036.               |
| (3) JUDITH CASSEL                          | 40.00               |                                |                       |         |              |                                 |        |                            |                                  |                        |
| CHIEF OF STAFF                             | 0.00                |                                |                       |         | Х            |                                 |        | 428,454.                   | 0.                               | 88,360.                |
| (4) FURMAN MCDONALD                        | 40.00               |                                |                       |         |              |                                 |        |                            |                                  |                        |
| SVP, ACADEMIC & MEDICAL AFFAIRS            | 0.00                |                                |                       |         | Х            |                                 |        | 456,077.                   | 0.                               | 54,790.                |
| (5) REBECCA LIPNER                         | 40.00               |                                |                       |         |              |                                 |        |                            |                                  |                        |
| SVP, ASSESSMENT & RESEARCH                 | 0.00                |                                |                       |         | Х            |                                 |        | 422,869.                   | 0.                               | 60,332.                |
| (6) VINCENT MANDES                         | 36.00               |                                |                       |         |              |                                 |        |                            |                                  |                        |
| SENIOR VICE PRESIDENT/CFO                  | 4.00                |                                |                       | Х       |              |                                 |        | 390,744.                   | 43,417.                          | 48,656.                |
| (7) PAMELA BROWNER-WHITE                   | 35.00               |                                |                       |         | l            |                                 |        | 200 000                    | 40 450                           |                        |
| SVP, COMMUNICATIONS                        | 5.00                |                                |                       |         | Х            | _                               |        | 329,075.                   | 49,172.                          | 80,392.                |
| (8) JEFFREY MILLER                         | 40.00               |                                |                       |         | ,,           |                                 |        | 240 510                    |                                  | 05 007                 |
| VP, INFORMATION TECHNOLOGY                 | 0.00                |                                |                       |         | Х            |                                 |        | 349,518.                   | 0.                               | 85,007.                |
| (9) LORNA LYNN                             | 39.00               |                                |                       |         |              | ,,                              |        | 214 000                    | C 405                            | 46 260                 |
| VP, MEDICAL EDUCATION RESEARCH             | 1.00                |                                |                       |         |              | X                               |        | 314,820.                   | 6,425.                           | 46,368.                |
| (10) BRADLEY BROSSMAN                      | 40.00               |                                |                       |         |              |                                 |        | 0.45 435                   | •                                | 60 005                 |
| VP, PSYCHOMETRICS                          | 0.00                |                                |                       |         |              | X                               |        | 247,435.                   | 0.                               | 60,235.                |
| (11) ROBERT KENDRICK                       | 40.00               |                                |                       |         |              | ,,                              |        | 010 100                    |                                  | 65 060                 |
| VP, FINANCE OPERATIONS                     | 0.00                |                                | _                     |         |              | X                               |        | 212,109.                   | 0.                               | 65,069.                |
| (12) MICHAEL YAGLEY                        | 40.00               |                                |                       |         |              |                                 |        | 000 501                    | •                                | 62.640                 |
| SR DIR, APPLICATION DEVELOPMENT            | 0.00                |                                | _                     |         |              | X                               |        | 208,591.                   | 0.                               | 63,640.                |
| (13) BERNADETTE HORVAT                     | 40.00               |                                |                       |         |              | ,,                              |        | 007 410                    |                                  | 24 456                 |
| VP, TALENT AND CULTURE                     | 0.00                |                                |                       |         |              | X                               |        | 237,413.                   | 0.                               | 34,456.                |
| (14) JEREMY DUGOSH                         | 40.00               |                                |                       |         |              |                                 |        | 000 600                    |                                  | 00 000                 |
| VP, TEST DEVELOPMENT                       | 0.00                |                                | _                     |         | Х            | _                               |        | 222,688.                   | 0.                               | 28,998.                |
| (15) YUL D. EJNES, MD                      | 7.00                | ,,                             |                       | , ,     |              |                                 |        | F0 000                     | 10 000                           | _                      |
| CHAIR (46) POPERT P. STEERY                | 5.00                | Х                              | _                     | Х       | _            | _                               |        | 50,000.                    | 10,000.                          | 0.                     |
| (16) ROBERT D. SIEGEL                      | 5.00                |                                |                       |         |              |                                 |        | 00.750                     |                                  | _                      |
| BOD  | 0.00                | Х                              |                       |         | _            | _                               |        | 20,750.                    | 0.                               | 0.                     |
| (17) ERICA JOHNSON, MD                     | 5.00                | ,,                             |                       |         |              |                                 |        | 20 500                     | _                                | _                      |
| BOD  | 0.00                | X                              |                       |         | <u> </u>     |                                 |        | 20,500.                    | 0.                               | 0.                     |
| 232007 12-13-22                            |                     |                                |                       |         |              |                                 |        |                            |                                  | Form <b>990</b> (2022) |

232007 12-13-22

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Form 990 (2022)

39-0866228 Page 8

THE AMERICAN BOARD OF INTERNAL MEDICINE

|   |                   |                                |                       |         |              |                              |        | AL MEDICINE         | 39-0866                          | <b>∠∠8</b> Page <b>o</b> |
|---|-------------------|--------------------------------|-----------------------|---------|--------------|------------------------------|--------|---------------------|----------------------------------|--------------------------|
| Part VII Section A. Officers, Directors, Trus | tees, Key Emp     | oloy                           | ees,                  | and     | l Hig        | ghes                         | t Co   | mpensated Employee  | s (continued)                    |                          |
| (A)   | (B)               |                                |                       |         | C)           |                              |        | (D)                 | (E)                              | (F)                      |
| Name and title                                | Average           | (do                            |                       | Pos     |              | l<br>than c                  | one    | Reportable          | Reportable                       | Estimated                |
|   | hours per         | box                            | , unles               | ss per  | son i        | s both                       | n an   | compensation        | compensation                     | amount of                |
|   | week<br>(list any |                                | l an                  |         | recto        | i/ii us                      | (66)   | from                | from related                     | other                    |
|   | hours for         | lirecto                        |                       |         |              |                              |        | the<br>organization | organizations<br>(W-2/1099-MISC/ | compensation from the    |
|   | related           | e or c                         | stee                  |         |              | sated                        |        | (W-2/1099-MISC/     | 1099-NEC)                        | organization             |
|   | organizations     | Individual trustee or director | Institutional trustee |         | yee          | mper                         |        | 1099-NEC)           | 1000 (120)                       | and related              |
|   | below             | idual                          | ution                 | <br>    | Key employee | est co<br>oyee               | er     | ,                   |                                  | organizations            |
|   | line)             | Indiv                          | Instit                | Officer | Key e        | Highest compensated employee | Former |                     |                                  |                          |
| (18) MARIANNE M. GREEN                        | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD   | 5.00              | Х                              |                       |         |              |                              |        | 14,000.             | 10,000.                          | 0.                       |
| (19) RAJEEV JAIN, MD                          | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| CHAIR-ELECT                                   | 0.00              | Х                              |                       | Х       |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (20) CHARLES SETH LANDEFELD                   | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD TREASURER                                 | 0.00              | Х                              |                       | Х       |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (21) ROBERT ROSWELL, MD                       | 2.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD SECRETARY                                 | 0.00              | Х                              |                       | Х       |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (22) VINEET ARORA                             | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD   | 0.00              | Х                              |                       |         |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (23) SAFWAN BADR                              | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD   | 0.00              | Х                              |                       |         |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (24) ROGER W. BUSH                            | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD   | 0.00              | Х                              |                       |         |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (25) CARLADENISE EDWARDS                      | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD   | 0.00              | Х                              |                       |         |              |                              |        | 14,000.             | 0.                               | 0.                       |
| (26) ALICIA FERNANDEZ                         | 5.00              |                                |                       |         |              |                              |        |                     |                                  |                          |
| BOD   | 0.00              | Х                              |                       |         |              |                              |        | 14,000.             | 0.                               | 0.                       |
| 1b Subtotal                                   |                   |                                |                       |         |              |                              |        | 5,391,265.          | 342,852.                         | 1082714.                 |
| c Total from continuation sheets to Part VI   | I, Section A      |                                |                       |         |              |                              |        | 7,000.              | 0.                               | 0.                       |
| d Total (add lines 1b and 1c)                 |                   |                                |                       |         |              |                              |        | 5,398,265.          | 342,852.                         | 1082714.                 |

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

87 Yes No Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on 3 line 1a? If "Yes," complete Schedule J for such individual For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual Х 4 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services X rendered to the organization? If "Yes." complete Schedule J for such person

### Section B. Independent Contractors

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

| (A) Name and business address  | (B) Description of services     | (C)<br>Compensation |
|--|---------------------------------|---------------------|
| INSIGHT GLOBAL, 4170 ASHFORD DUNWOODY  |                                 |                     |
|  | EMPLOYMENT AGENCY               | 1,003,770.          |
| BALLARD SPAHR LLP  |                                 | ,                   |
| 1735 MARKET STREET, PHILADELPHIA, PA 19103   | LEGAL SERVICES                  | 939,608.            |
| EVOLTA LLC   |                                 |                     |
| 609 MAPLEWOOD AVENUE, SPRINGFIELD, PA 19064  | IT RECRUITING                   | 935,653.            |
| EAST WEST SYSTEMS, INC.  |                                 |                     |
| 417 SOUTH STREET, PHILADELPHIA, PA 19147   | SOFTWARE SERVICES               | 425,861.            |
| ZOOMORPHIX SYSTEMS, 269 CENTRE RD,   |                                 |                     |
| BENTLEIGH, VICTORIA, AUSTRALIA   | SOFTWARE SERVICES               | 401,780.            |
| 2 Total number of independent contractors (including but not limited to those listed | d above) who received more than |                     |
| \$100,000 of compensation from the organization 20                                   |                                 |                     |

SEE PART VII, SECTION A CONTINUATION SHEETS

39-0866228 THE AMERICAN BOARD OF INTERNAL MEDICINE Form 990 Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) (F) (A) (B) (C) (D) (E) Name and title Position Reportable Reportable Estimated Average (check all that apply) compensation compensation amount of hours per from from related other week the organizations compensation Highest compensated employee organization (W-2/1099-MISC) (list any Individual trustee or director from the (W-2/1099-MISC) hours for organization Institutional trustee related and related Key employee organizations organizations below Officer ( line) (27) MEGAN KOEPKE 5.00 7,000. BOD 0.00 X 0. 0.

Total to Part VII, Section A, line 1c

7,000.

|   |    |        | Check if Schedule O contains a response       | or note to any line     | e in this Part VIII |  |                                |  |
|---|----|--------|---|-------------------------|---------------------|--|--------------------------------|--|
|   |    |        | Chicago Containe a respense                   |                         | (A) Total revenue   | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512 - 514 |
| s s   | 1  | а      | Federated campaigns 1a                        |                         |                     |  |                                |  |
| an  |    |        | Membership dues 1b                            |                         |                     |  |                                |  |
| Ž,č   |    | С      | Fundraising events 1c                         |                         |                     |  |                                |  |
| ar /  |    |        | Related organizations 1d                      |                         |                     |  |                                |  |
| imi   |    |        | Government grants (contributions) 1e          |                         |                     |  |                                |  |
| Contributions, Gifts, Grants<br>and Other Similar Amounts |    | f      | All other contributions, gifts, grants, and   |                         |                     |  |                                |  |
| O Th  |    |        | similar amounts not included above 1f         |                         |                     |  |                                |  |
| ndi   |    | g      | Noncash contributions included in lines 1a-1f |                         |                     |  |                                |  |
| ס כ   |    | h      | Total. Add lines 1a-1f                        | Business Code           |                     |  |                                |  |
|   | _  | _      | MAINTENANCE OF CERTIFICATION                  | 900099                  | 50,179,082.         | 50179082.                              |                                |  |
| Revenue   | 2  | a<br>b | CERTIFICATION EXAM FEES                       | 900099                  | 36,982,611.         | 36982611.                              |                                |  |
| ine ,   |    | C      | -   | 300033                  | 30,302,011.         | 30302011.                              |                                |  |
| ver   |    | d      |   |                         |                     |  |                                |  |
| Re  |    | e      |   |                         |                     |  |                                |  |
| [ ]   |    |        | All other program service revenue             |                         |                     |  |                                |  |
|   |    |        | Total. Add lines 2a-2f                        |                         | 87,161,693.         |  |                                |  |
|   | 3  |        | Investment income (including dividends, inter |                         |                     |  |                                |  |
|   |    |        | other similar amounts)                        |                         | 2,337,763.          |  |                                | 2337763  |
|   | 4  |        | Income from investment of tax-exempt bond     |                         |                     |  |                                |  |
|   | 5  |        | Royalties                                     |                         |                     |  |                                |  |
|   |    |        | (i) Real                                      | (ii) Personal           |                     |  |                                |  |
|   | 6  | а      | Gross rents 6a                                |                         |                     |  |                                |  |
|   |    |        | Less: rental expenses 6b                      |                         |                     |  |                                |  |
|   |    |        | Rental income or (loss) 6c                    |                         |                     |  |                                |  |
|   |    |        |   | (") OH                  |                     |  |                                |  |
|   | 7  | а      | Gross amount from sales of (i) Securities     | (ii) Other              |                     |  |                                |  |
|   |    |        | assets other than inventory 7a                |                         |                     |  |                                |  |
| o o   |    | b      | Less: cost or other basis                     |                         |                     |  |                                |  |
| Revenue   |    | _      | and sales expenses 7b Gain or (loss) 7c       | +                       |                     |  |                                |  |
| eve   |    |        | Net gain or (loss)                            |                         |                     |  |                                |  |
| er B  |    |        | Gross income from fundraising events (not     |                         |                     |  |                                |  |
| Ğ.  | Ü  | u      | including \$ of                               |                         |                     |  |                                |  |
|   |    |        | contributions reported on line 1c). See       |                         |                     |  |                                |  |
|   |    |        | Part IV, line 18                              | a                       |                     |  |                                |  |
|   |    | b      | Less: direct expenses 8                       | 0                       |                     |  |                                |  |
|   |    | С      | Net income or (loss) from fundraising events  |                         |                     |  |                                |  |
|   | 9  | а      | Gross income from gaming activities. See      |                         |                     |  |                                |  |
|   |    |        | Part IV, line 19                              | а                       |                     |  |                                |  |
|   |    | b      | Less: direct expenses 9                       | o                       |                     |  |                                |  |
|   |    | С      | Net income or (loss) from gaming activities   |                         |                     |  |                                |  |
|   | 10 | а      | Gross sales of inventory, less returns        |                         |                     |  |                                |  |
|   |    |        | and allowances10                              |                         |                     |  |                                |  |
|   |    |        | Less: cost of goods sold 10                   | b                       |                     |  |                                |  |
|   |    | С      | Net income or (loss) from sales of inventory  | Pusings Ond             |                     |  |                                |  |
| s l   | 44 | _      | OTHER BOARD EXAM REVENUE                      | Business Code<br>900099 | 108,478.            | 100 470                                |                                |  |
| eo<br>ne  | 11 |        | RESCORE                                       | 900099                  | 57,250.             | 108,478.<br>57,250.                    |                                |  |
| ilar<br>Ven   |    |        | CREDENTIALING FEES                            | 900099                  | 48,900.             | 48,900.                                |                                |  |
| Miscellaneous<br>Revenue                                  |    | _      | All other revenue                             | 900099                  | 323,811.            | 296,115.                               |                                | 27,696   |
| Σ   |    |        | Total. Add lines 11a-11d                      |                         | 538,439.            | 250,115.                               |                                | 27,000   |
|   | 12 |        | Total revenue. See instructions               |                         | 90,037,895.         | 87672436.                              | 0.                             | 2365459  |

232009 12-13-22

Form 990 (2022) THE AMERICAN BOARD OF INTERNAL MEDICINE

39-0866228

Page 10

Part IX Statement of Functional Expenses

| Secti     | on 501(c)(3) and 501(c)(4) organizations must comp  | olete all columns. All othe | er organizations must cor    | mplete column (A).                  |                                       |
|-----------|---|-----------------------------|------------------------------|-------------------------------------|---------------------------------------|
|           | Check if Schedule O contains a respor   | nse or note to any line in  |                              |                                     | X                                     |
|           | not include amounts reported on lines 6b,<br>8b, 9b, and 10b of Part VIII.                              | (A)<br>Total expenses       | (B) Program service expenses | (C) Management and general expenses | <b>(D)</b><br>Fundraising<br>expenses |
| 1         | Grants and other assistance to domestic organizations   |                             | •                            |                                     |                                       |
|           | and domestic governments. See Part IV, line 21  |                             |                              |                                     |                                       |
| 2         | Grants and other assistance to domestic   |                             |                              |                                     |                                       |
|           | individuals. See Part IV, line 22   |                             |                              |                                     |                                       |
| 3         | Grants and other assistance to foreign  |                             |                              |                                     |                                       |
|           | organizations, foreign governments, and foreign   |                             |                              |                                     |                                       |
|           | individuals. See Part IV, lines 15 and 16   |                             |                              |                                     |                                       |
| 4         | Benefits paid to or for members   |                             |                              |                                     |                                       |
| 5         | Compensation of current officers, directors,  |                             |                              |                                     |                                       |
|           | trustees, and key employees   | 4,942,251.                  | 3,793,177.                   | 1,149,074.                          |                                       |
| 6         | Compensation not included above to disqualified   |                             |                              |                                     |                                       |
|           | persons (as defined under section 4958(f)(1)) and   |                             |                              |                                     |                                       |
|           | persons described in section 4958(c)(3)(B)  |                             |                              |                                     |                                       |
| 7         | Other salaries and wages  | 22,850,263.                 | 17,406,940.                  | 5,443,323.                          |                                       |
| 8         | Pension plan accruals and contributions (include  |                             |                              |                                     |                                       |
|           | section 401(k) and 403(b) employer contributions)   | 2,163,452.                  | 1,660,450.                   | 503,002.                            |                                       |
| 9         | Other employee benefits   | 2,582,551.                  | 1,660,450.<br>1,946,421.     | 636,130.                            |                                       |
| 10        | Payroll taxes   | 1,898,406.                  | 1,457,027.                   | 441,379.                            |                                       |
| 11        | Fees for services (nonemployees):   |                             |                              |                                     |                                       |
| а         | Management  |                             |                              |                                     |                                       |
| b         | Legal   | 1,049,691.                  | 800,568.                     | 249,123.                            |                                       |
| С         | Accounting  | 59,404.                     | 45,306.                      | 14,098.                             |                                       |
|           | Lobbying  |                             |                              |                                     |                                       |
| е         | Professional fundraising services. See Part IV, line 17   |                             |                              |                                     |                                       |
| f         | Investment management fees  |                             |                              |                                     |                                       |
| g         | Other. (If line 11g amount exceeds 10% of line 25,  |                             |                              |                                     |                                       |
|           | column (A), amount, list line 11g expenses on Sch O.)   | 6,509,179.                  | 4,964,357.                   | 1,544,822.                          |                                       |
| 12        | Advertising and promotion   |                             |                              |                                     |                                       |
| 13        | Office expenses   | 1,275,840.                  | 973,045.                     | 302,795.                            |                                       |
| 14        | Information technology  |                             |                              |                                     |                                       |
| 15        | Royalties   |                             |                              |                                     |                                       |
| 16        | Occupancy   | 3,278,394.                  | 2,500,333.                   | 778,061.                            |                                       |
| 17        | Travel  | 74,993.                     | 57,195.                      | 17,798.                             |                                       |
| 18        | Payments of travel or entertainment expenses  |                             |                              |                                     |                                       |
|           | for any federal, state, or local public officials $\dots$   |                             |                              |                                     |                                       |
| 19        | Conferences, conventions, and meetings  | 749,714.                    | 571,785.                     | 177,929.                            |                                       |
| 20        | Interest  |                             |                              |                                     |                                       |
| 21        | Payments to affiliates  |                             |                              |                                     |                                       |
| 22        | Depreciation, depletion, and amortization   | 1,265,647.                  | 965,271.                     | 300,376.                            |                                       |
| 23        | Insurance   | 937,757.                    | 715,199.                     | 222,558.                            |                                       |
| 24        | Other expenses. Itemize expenses not covered  |                             |                              |                                     |                                       |
|           | above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), |                             |                              |                                     |                                       |
|           | amount, list line 24e expenses on Schedule 0.)  | 0.054 505                   | 0.054 505                    |                                     |                                       |
| а         | CERTIFYING EXAM   | 8,871,586.                  | 8,871,586.                   |                                     |                                       |
| b         | MOC EXAM  | 3,372,460.                  | 3,372,460.                   | 100 510                             |                                       |
| С         | STAFF EXPENSES  | 437,024.                    | 333,305.                     | 103,719.                            |                                       |
| d         | PROGRAM/PROJECT EXPENSE   | 266,797.                    | 203,478.                     | 63,319.                             |                                       |
|           | All other expenses  | 379,192.                    | 289,198.                     | 89,994.                             | ^                                     |
| <u>25</u> | Total functional expenses. Add lines 1 through 24e  | 62,964,601.                 | 50,927,101.                  | 12,037,500.                         | 0                                     |
| 26        | <b>Joint costs.</b> Complete this line only if the organization   |                             |                              |                                     |                                       |
|           | reported in column (B) joint costs from a combined  |                             |                              |                                     |                                       |
|           | educational campaign and fundraising solicitation.  Check here if following SOP 98-2 (ASC 958-720)      |                             |                              |                                     |                                       |
|           | Check here if following SOP 98-2 (ASC 958-720)  |                             |                              |                                     |                                       |

Form 990 (2022)

Part X | Balance Sheet

| Pai                         | rt X | Balance Sheet   |            |                       |                                 |              |                             |
|-----------------------------|------|---|------------|-----------------------|---------------------------------|--------------|-----------------------------|
|                             |      | Check if Schedule O contains a response or note                                     | to an      | y line in this Part X |                                 |              |                             |
|                             |      |   |            |                       | <b>(A)</b><br>Beginning of year |              | <b>(B)</b><br>End of year   |
|                             | 1    | Cash - non-interest-bearing   |            |                       | 71,140,298.                     | 1            | 14,770,912.                 |
|                             | 2    | Savings and temporary cash investments  |            |                       | 21,354,973.                     |              | 109,996,330.                |
|                             | 3    | Pledges and grants receivable, net  |            |                       |                                 |              | 66,897.                     |
|                             | 4    | Accounts receivable, net  |            |                       | 69,697.<br>71,313.              | 4            | 88,660.                     |
|                             | 5    | Loans and other receivables from any current or f                                   |            |                       |                                 |              |                             |
|                             |      | trustee, key employee, creator or founder, substa                                   | ntial c    | contributor, or 35%   |                                 |              |                             |
|                             |      | controlled entity or family member of any of these                                  | pers       | ons[                  |                                 | 5            |                             |
|                             | 6    | Loans and other receivables from other disqualified                                 | ed per     | sons (as defined      |                                 |              |                             |
|                             |      | under section 4958(f)(1)), and persons described i                                  | in sec     | tion 4958(c)(3)(B)    |                                 | 6            |                             |
| s,                          | 7    | Notes and loans receivable, net   |            |                       |                                 | 7            |                             |
| Assets                      | 8    | Inventories for sale or use   |            |                       |                                 | 8            |                             |
| As                          | 9    |   |            |                       | 2,060,234.                      | 9            | 2,209,591.                  |
|                             | 10a  | Land, buildings, and equipment: cost or other                                       |            |                       |                                 |              |                             |
|                             |      | basis. Complete Part VI of Schedule D   | 10a        | 18,990,783.           |                                 |              |                             |
|                             | b    | Less: accumulated depreciation  | 10b        | 16,986,025.           | 2,439,064.                      | 10c          | 2,004,758.<br>3,963,343.    |
|                             | 11   | Investments - publicly traded securities  |            | 3,604,195.            | 11                              | 3,963,343.   |                             |
|                             | 12   | Investments - other securities. See Part IV, line 11                                |            | 12                    |                                 |              |                             |
|                             | 13   | Investments - program-related. See Part IV, line 1                                  |            | 13                    |                                 |              |                             |
|                             | 14   | Intangible assets   |            | 14                    |                                 |              |                             |
|                             | 15   | Other assets. See Part IV, line 11  |            |                       | 58,538.                         | 15           | 46,923,965.                 |
|                             | 16   | Total assets. Add lines 1 through 15 (must equal                                    |            |                       | 100,798,312.                    | 16           | 180,024,456.                |
|                             | 17   | Accounts payable and accrued expenses   |            |                       | 6,654,656.                      | 17           | 7,239,492.                  |
|                             | 18   | Grants payable  | 07 406 050 | 18                    | 24 222 222                      |              |                             |
|                             | 19   | Deferred revenue  |            |                       | 87,186,052.                     | 19           | 91,089,290.                 |
|                             | 20   | Tax-exempt bond liabilities   |            |                       |                                 | 20           |                             |
|                             | 21   | Escrow or custodial account liability. Complete Pa                                  |            |                       |                                 | 21           |                             |
| es                          | 22   | Loans and other payables to any current or forme                                    |            |                       |                                 |              |                             |
| Liabilities                 |      | trustee, key employee, creator or founder, substa                                   |            | i i                   |                                 |              |                             |
| jab                         |      | controlled entity or family member of any of these                                  | -          |                       |                                 | 22           |                             |
| _                           | 23   | Secured mortgages and notes payable to unrelate                                     |            | F                     |                                 | 23           |                             |
|                             | 24   | Unsecured notes and loans payable to unrelated                                      |            |                       |                                 | 24           |                             |
|                             | 25   | Other liabilities (including federal income tax, paya                               |            |                       |                                 |              |                             |
|                             |      | parties, and other liabilities not included on lines                                | ,          | ·                     | 13,128,031.                     | 0.5          | 60 805 534                  |
|                             | 06   | of Schedule D   |            |                       | 106,968,739.                    |              | 60,805,534.<br>159,134,316. |
|                             | 26   | Total liabilities. Add lines 17 through 25  |            | e X                   | 100,300,733.                    | 26           | 139,134,310.                |
| S                           |      | Organizations that follow FASB ASC 958, chec and complete lines 27, 28, 32, and 33. | k ner      | e 🔼                   |                                 |              |                             |
| ü                           | 27   |   |            |                       | -6,240,124.                     | 27           | 20,823,243.                 |
| ala                         | 28   |   |            |                       | 69,697.                         | 28           | 66,897.                     |
| <u> </u>                    | 20   | Organizations that do not follow FASB ASC 95  |            | ock here              | 03,037.                         | 20           | 00,0371                     |
| 臣                           |      | and complete lines 29 through 33.   | o, cire    | ck liefe              |                                 |              |                             |
| þ                           | 29   | Capital stock or trust principal, or current funds                                  |            |                       |                                 | 29           |                             |
| ets                         | 30   | Paid-in or capital surplus, or land, building, or equ                               |            | T T                   |                                 | 30           |                             |
| Ass                         | 31   | Retained earnings, endowment, accumulated inco                                      |            |                       |                                 | 31           |                             |
| Net Assets or Fund Balances | 32   |   |            | or otner tunds        | -6,170,427.                     | 32           | 20,890,140.                 |
| Ž                           | 33   |   |            | 100,798,312.          | 33                              | 180,024,456. |                             |
|                             | 1 00 |   |            | I                     |                                 | _ 55         | Form <b>990</b> (2022)      |

|    | 1990 (2022) THE AMERICAN BOARD OF INTERNAL MEDICINE   | 39-(     | 18662 | 228  | Pa  | ge 12       |
|----|---|----------|-------|------|-----|-------------|
|    | rt XI Reconciliation of Net Assets  |          |       |      |     |             |
|    | Check if Schedule O contains a response or note to any line in this Part XI   |          |       |      |     |             |
|    |   |          |       |      |     |             |
| 1  | Total revenue (must equal Part VIII, column (A), line 12)   | 1        |       | 037  |     |             |
| 2  | Total expenses (must equal Part IX, column (A), line 25)  | 2        |       | 964  |     |             |
| 3  | Revenue less expenses. Subtract line 2 from line 1  | 3        |       |      |     | <u>94.</u>  |
| 4  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                             | 4        | -6,   |      |     | <u> 27.</u> |
| 5  | Net unrealized gains (losses) on investments  | 5        |       | -12  | 2,7 | 27.         |
| 6  | Donated services and use of facilities  | 6        |       |      |     |             |
| 7  | Investment expenses   | 7        |       |      |     |             |
| 8  | Prior period adjustments  | 8        |       |      |     |             |
| 9  | Other changes in net assets or fund balances (explain on Schedule O)  | 9        |       |      |     | 0.          |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32,                    |          |       |      |     |             |
|    | column (B))   | 10       | 20,   | 890  | ),1 | <u>40.</u>  |
| Pa | rt XIII Financial Statements and Reporting  |          |       |      |     |             |
|    | Check if Schedule O contains a response or note to any line in this Part XII  |          |       |      |     |             |
|    |   |          | _     |      | Yes | No          |
| 1  | Accounting method used to prepare the Form 990: Cash X Accrual Other  |          | _     |      |     |             |
|    | If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule        | Ο.       |       |      |     |             |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant?                       |          | L     | 2a   |     | X           |
|    | If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed       | on a     |       |      |     |             |
|    | separate basis, consolidated basis, or both:  |          |       |      |     |             |
|    | Separate basis Consolidated basis Both consolidated and separate basis  |          |       |      |     |             |
| b  | Were the organization's financial statements audited by an independent accountant?                                    |          | L     | 2b   | Х   |             |
|    | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate      |          |       |      |     |             |
|    | consolidated basis, or both:  |          |       |      |     |             |
|    | Separate basis X Consolidated basis Both consolidated and separate basis  |          |       |      |     |             |
| С  | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the    | audit,   |       |      |     |             |
|    | review, or compilation of its financial statements and selection of an independent accountant?                        |          |       | 2c   | Х   |             |
|    | If the organization changed either its oversight process or selection process during the tax year, explain on Sche    | edule O. |       |      |     |             |
| За | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the       |          |       |      |     |             |
|    | Uniform Guidance, 2 C.F.R. Part 200, Subpart F?   |          |       | За   |     | X           |
| b  | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required | ed audit | Т Г   |      |     |             |
|    |   |          |       | O.L. |     | l           |

232012 12-13-22

#### **SCHEDULE A**

(Form 990)

Department of the Treasury Internal Revenue Service

## **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Publ Inspection

OMB No. 1545-0047

Open to Public

Name of the organization

THE AMERICAN BOARD OF INTERNAL MEDICINE

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

| Coloraditation of the state of  |     |            |  |                                       | <u> </u>                     |                  |                 |   |                            |  |  |
|--|-----|------------|--|---------------------------------------|------------------------------|------------------|-----------------|---|----------------------------|--|--|
| 2 A school described in section 170(b)(1/kA/iii), Attach Schedule E (Form 990).) 3 A hospital or a cooperative hospital service organization described in section 170(b)(1/kA/iii). 4 A medical research organization operated in conjunction with a hospital described in section 170(b)(1/kA/iii). Enter the hospital's notify, and state: 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1/kA/iii). (Complete Part II.) 5 A federal, state, or local government or governmental unit described in section 170(b)(1/kA/iv). (Complete Part III.) 6 A reganization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1/kA/iv). (Complete Part III.) 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1/kA/iv). (Complete Part III.) 9 A nagricultural research organization described in section 170(b)(1/kA/iv), operated in conjunction with a land-grant college or university or an on-land-grant college of agriculture (see instructions), Enter the name, city, and state of the college or university.  10 X An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization and complete income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization and organization organization organizations and complete plant (1) to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 500(kg/1) or section 500(kg/2). See section 500(kg/3). Check the box of less 12 throug | he  | organ      | ization is not a private found   | ation because it is: (F               | For lines 1 through 12, cl   | heck only        | one box.)       |   |                            |  |  |
| A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). Enter the hospital's no city, and state:  A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's no city, and state:  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)  A regardization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(iv). (Complete Part II.)  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(iv). (Complete Part II.)  An organization organization described in section 170(b)(1)(A)(iv). (Complete Part II.)  An organization repair organization described in section 170(b)(1)(A)(iv). (Operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university.  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross invest income and unrelated businesses stazabile income (less section 511 tax) from businesses sacquired by the organization and attended to its exempt functions, subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross invest income and unrelated businesses stazabile normal feet June 30, 19 See section 509(a)(2). (Complete Part II.)  An organization organization depended exclusively to test for public safety. See section 509(a)(4).  The proposition organization depended exclusively for the benefit of, to perior the functions of, or to carry out the purposes of one m | 1   |            | A church, convention of ch   | urches, or associatio                 | n of churches described      | in <b>sectio</b> | n 170(b)(1      | I)(A)(i).                               |                            |  |  |
| A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's nicity, and state:  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)  A forganization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(iv). (Complete Part II.)  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(iv). (Complete Part II.)  An agricultural research organization described in section 170(b)(1)(A)(iv). Operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business staable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). Complete Part II.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively to test for public safety. See section 509(a)(3). See section 509(a)(3). See section 509(a)(3). See section 509(a)(3). Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12d, and 12g.  Type I. A supporting organization generally appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV. Sections A and C.  Type III functionally integrated. A supporting organization operated i | 2   |            | A school described in secti  | ion 170(b)(1)(A)(ii). (               | Attach Schedule E (Form      | n 990).)         |                 |   |                            |  |  |
| city, and state:    An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(ii), (Complete Part II.)   A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v),   An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(v), (Complete Part III.)   An agricultural research organization described in section 170(b)(1)(A)(v), (Complete Part III.)   An agricultural research organization described in section 170(b)(1)(A)(v), (Complete Part III.)   An agricultural research organization described in section 170(b)(1)(A)(v), (Complete Part III.)   An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gors investing income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization of from gross investing income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2), (Complete Part III.)  | 3   |            | A hospital or a cooperative  | hospital service orga                 | anization described in se    | ection 170       | (b)(1)(A)(ii    | i).                                     |                            |  |  |
| an organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)  A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(iv). (Complete Part II.)  A community trust described in section 170(b)(1)(A)(iv). (Complete Part III.)  A community trust described in section 170(b)(1)(A)(iv). Operated in conjunction with a land-grant college or university or an on-hand-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university.  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g, and 17g, be 1. A supporting organization seperated, supervised, or controlled by its supported organization(s), by laving the supported organization(s) the power to requiarly appoint or elect a majority of the directors or trustees of the supporting organization organization supervised or controlled in connection with its supported organizatio  | 4   |            | A medical research organization  | ation operated in cor                 | njunction with a hospital    | described        | in sectio       | n 170(b)(1)(A)(iii). Enter              | the hospital's name,       |  |  |
| section 170(b)(1)(A)(iv). (Complete Part II.)  A federal, stack, or local government or governmental unit described in section 170(b)(1)(A)(v).  A federal, stack, or local government or governmental unit described in section 170(b)(1)(A)(v).  A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)  An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university.  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively to the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g, and  |     |            | city, and state:   |                                       |                              |                  |                 |   |                            |  |  |
| A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(v). (Complete Part II.) A community trust described in section 170(b)(1)(A)(v). (Complete Part II.) A community trust described in section 170(b)(1)(A)(v). (Complete Part II.) A community trust described in section 170(b)(1)(A)(v). operated in conjunction with a land-grant college or university:  IV. A organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.) An organization organized and operated exclusively to test for public safety. See section 509(a)(4). An organization organization described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization sold, and complete lines 12e, 12t, and 12g.  a Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), by picking the supported organization (s) the power to regularly apoption or elect a majority of the directors or trustees of the supporting organization of very large and complete lines 12e, 12t, and 12g.  b Type I. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization or elect a majority of the directors or trustees of the supporting organization of very large and the supported organization of the supported organization of connection with its supported organization (s).  Type II. An o | 5   |            | An organization operated for   | or the benefit of a col               | lege or university owned     | or operat        | ed by a go      | vernmental unit describe                | ed in                      |  |  |
| An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(v). (Complete Part II.)  An agricultural research organization described in section 170(b)(1)(A)(x) operated in conjunction with a land-grant college or university or a non-land grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:  10   |     |            | section 170(b)(1)(A)(iv). (C   | Complete Part II.)                    |                              |                  |                 |   |                            |  |  |
| An organization that normally receives a substantial part of its support from a governmental unit or from the general public described section 170(b)(1)(A)(v). (Complete Part II.)  An agricultural research organization described in section 170(b)(1)(A)(x) operated in conjunction with a land-grant college or university or a non-land grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:  10   | 6   |            | A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). |                                       |                              |                  |                 |   |                            |  |  |
| section 170(b)(1)(A)(vi). (Complete Part II.)  A community trust described in section 170(b)(1)(A)(xi). (Complete Part III.)  A community trust described in section 170(b)(1)(A)(xi) operated in conjunction with a land-grant college or university.  A an organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organization addoperated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  Type II apported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  b Type III supported organization(s) uspervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization operated in connection with its supported organization(s), by having control or management of the supporting organization operated in connection with its supported organization(s) that is not functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization operated in connection wit | 7   | $\Box$     |  | -                                     |                              |                  |                 |   | oublic described in        |  |  |
| A community trust described in section 170(b)(1)(A)(ii) (Complete Part II.)  An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university.  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box of lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. Vou must complete Part IV, Sections A and B.  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by laving control or management of the supporting organization vested in the same persons that control or manage the supported organization organization organization supporting organization operated in connection with its supported organization(s) that is not functionally integrated. A supporting organization organization organization organization organi |     |            | -  | •                                     |                              | 3                |                 | 3                                       |                            |  |  |
| An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or frustees of the supporting organization. Type II. A supporting organization supervised or controlled in connection with its supported organizations, by having control or management of the supporting organization operated in connection with its supported organizations, by our must complete Part IV, Sections A and C.  Type III functionally integrated. A supporting organization operated in connection with its supported organizations in the supported organization operated in connection with its supported organizations) that is not functionally integrated. A supporting organization operated in connection with its supported o | 8   |            |  | • •                                   | 1)(A)(vi). (Complete Par     | t II.)           |                 |   |                            |  |  |
| or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:  university:    To granization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)/2. (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)/4.  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)/4. (1) or section 509(a)/2. See section 509(a)/3. Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.    Type I. A supporting organization operated, supervised, or controlled by its supported organization(s) by giving the supported organization operated, supervised, or controlled by its supported organization(s) by giving organization. You must complete Part IV, Sections A and B.    Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization organization operated in connection with, and functionally integrated with, its supported organization (s) is supported organization (s). You must complete Part IV, Sections A and C.    Type III functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requ |     | 一          | •  |                                       |                              |                  | ed in coniu     | inction with a land-grant               | college                    |  |  |
| university:  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to tis exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organizated and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12 through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  Type III functionally integrated. The organization supervised organization with its supported organization(s) that is not functionally integrated. The organization supported organization is supported organization.  Provide the following information about the supported or | Ĭ   |            | -  |                                       |                              |                  | -               | -                                       | -                          |  |  |
| An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organizations, the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see ins |     |            | · · · · · ·  | rant concess of agrice                | and o (oco mondonomo).       | 21101 110 1      | namo, ony       | , and state of the conlege              | , 01                       |  |  |
| activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross invest income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organizations of the supporting organization. You must complete Part IV, Sections A and B.  b Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) to management of the supporting organization operated in connection with, and functionally integrated with, its supported organizations (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization (s) that is not functionally integrated. A supporting organization operated in connection with its supported organization (s) that is not functionally integrated. A supporting organization operated in connection with its supported organization (s) that is not functionally integrated. A supporting organization operated in connection with its supported organization (s) that is not functionally integrated. The organization operated in conn | ın  | X          |  | Ilv receives (1) more:                | than 33 1/3% of its supp     | ort from c       | ontribution     | ns membership fees and                  | d aross receipts from      |  |  |
| income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 19 See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  Type I. A supporting organization operated, supervised, or controlled by its supported organization by giving the supported organization (s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  Check this box if the organization received a written determination from the IRS that it is a Type II, Type III functionally integrated, or Type III non-functionally integrated supported organization.  (ii) Name of supported organiza |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| See section 509(a)(2). (Complete Part III.)  An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a  |     |            |  |                                       | •                            | ` '              |                 | • •                                     | · ·                        |  |  |
| An organization organized and operated exclusively to test for public safety. See section 509(a)(4).  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a   |     |            |  |                                       | (1000 000tion of 1 taxy in o | an baomoc        | occ acqui       | iod by the organization c               | artor durio do, 1010.      |  |  |
| An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box or lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a   | 11  |            |  | •                                     | vely to test for public sat  | fety See         | section 50      | )9(a)(4)                                |                            |  |  |
| more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box of lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a  Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  b  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  c  Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  d  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  e  Check this box if the organization received a written determination from the IRS that it is a Type II, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  g  Provide the following information about the supported organization (described on lines 1-10) above (see instructions)  (ii) Name of supported organizations  (iii) Fine regulations  (iv) Amount of monetary in the support (see instructions)  (iv) Amount of monetary in the support (see instructions)  (iv) Amount of monetary in the support (see instructions)   |     | Ħ          |  | •                                     | •                            | •                |                 |   | nurnoses of one or         |  |  |
| lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.  a  | _   |            | •  | •                                     | · · ·                        | •                |                 | •                                       |                            |  |  |
| Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  C Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  d Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  e Check this box if the organization received a written determination from the IRS that it is a Type I, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  f Enter the number of supported organizations  g Provide the following information about the supported organization(s).  (ii) SIN organization  (iii) SIN organization  (iv) Amount of monetary support (see instructions) support (see instructions) support (see instructions)   |     |            |  | -                                     |                              |                  |                 |   | oriook the box on          |  |  |
| the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.  b  | 9   |            | ¬  | * *                                   |                              |                  |                 |   | aivina                     |  |  |
| organization. You must complete Part IV, Sections A and B.  Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  Fenter the number of supported organizations  (ii) Provide the following information about the supported organization (see instructions)  (iii) Type of organization integrated in your governing document?  Yes No support (see instructions) support (see instructions) support (see instructions)  | -   |            |  | · · · · · · · · · · · · · · · · · · · | •                            | •                | -               |   |                            |  |  |
| Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  C Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  d Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  e Check this box if the organization received a written determination from the IRS that it is a Type I, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  f Enter the number of supported organizations  g Provide the following information about the supported organization ((ii) Type of organization (cleoribed on lines 1-10) above (see instructions)  (ii) Name of supported (iii) EIN ((iii) Type of organization (iv) is the organization listed (iv) Amount of monetary (vi) Amount of organization (see instructions)   |     |            | •  |                                       |                              | majority c       | in the direc    | tors or trastees or the st              | apporting                  |  |  |
| control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.  c  | h   |            | ¬ ~  | · · · · · · · · · · · · · · · ·       |                              | ion with it      | e cupporto      | nd organization(s), by bay              | vina                       |  |  |
| organization(s). You must complete Part IV, Sections A and C.  Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. As upporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  Fenter the number of supported organizations  Given the following information about the supported organization(s).  (ii) Simport (see instructions)  (iii) Simport (see instructions)  (iv) Amount of monetary support (see instructions)  yes No  Vol Amount of support (see instructions)   |     | · <u> </u> |  | •                                     |                              |                  |                 |   | -                          |  |  |
| Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  Check this box if the organization received a written determination from the IRS that it is a Type I, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  Fenter the number of supported organizations  Gerovide the following information about the supported organization(s).  (i) Name of supported  (ii) EIN  (iii) Type of organization  (iv) Is the organization listed in your governing document? Yes No  (vi) Amount of monetary support (see instructions)  Yes No   |     |            | _  |                                       |                              | arrie perso      | iis iiiai co    | ntion of manage the supp                | Jorted                     |  |  |
| its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.  Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  Check this box if the organization received a written determination from the IRS that it is a Type I, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  Fenter the number of supported organizations  g Provide the following information about the supported organization (described on lines 1-10) above (see instructions)  (ii) Name of supported organization  (iii) EIN  (iii) Type of organization insed in your governing document?  Yes No  Vol Amount of monetary support (see instructions)  support (see instructions)  | _   |            | ¬  | -                                     |                              | in connoct       | ion with        | and functionally integrate              | od with                    |  |  |
| Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  e   | C   |            |  |                                       |                              |                  |                 |   | eu wiiii,                  |  |  |
| that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  e   |     |            | 7  |                                       | ·                            |                  |                 |   | ration(a)                  |  |  |
| requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.  e  | C   | · L        |  |                                       |                              |                  |                 | • | * *                        |  |  |
| Check this box if the organization received a written determination from the IRS that it is a Type I, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization.  f Enter the number of supported organizations  g Provide the following information about the supported organization (ii) EIN  (iii) Type of organization (described on lines 1-10 above (see instructions))  Yes No  (v) Amount of monetary support (see instructions) support (see instructions)  |     |            | •  | -                                     | •                            | •                |                 | •                                       | reness                     |  |  |
| f Enter the number of supported organizations  g Provide the following information about the supported organization(s).  (i) Name of supported organization (described on lines 1-10 above (see instructions))  (iii) Type of organization (described on lines 1-10 above (see instructions))  (iv) Is the organization listed (iv) your governing document?  Yes No  (vi) Amount of monetary support (see instructions) support (see instructions)  |     |            | ¬ '  | ·                                     | -                            |                  |                 |   |                            |  |  |
| g Provide the following information about the supported organization(s).  (i) Name of supported (ii) EIN (iii) Type of organization (described on lines 1-10 above (see instructions))  (v) Amount of monetary support (see instructions)  ves No (vi) Amount of monetary support (see instructions)  (vi) Amount of monetary support (see instructions)  support (see instructions)   | е   |            | -  |                                       |                              |                  |                 | Type I, Type II, Type III               |                            |  |  |
| g Provide the following information about the supported organization(s).  (ii) Name of supported organization (described on lines 1-10 above (see instructions))  (iii) Type of organization (described on lines 1-10 above (see instructions))  (iv) Is the organization listed in your governing document?  Yes No  (vi) Amount of monetary support (see instructions)  support (see instructions)   | _   | Ente       | • •  |                                       |                              |                  |                 |   |                            |  |  |
| (ii) Name of supported organization (described on lines 1-10 above (see instructions))  (iii) Type of organization (described on lines 1-10 above (see instructions))  (iv) Is the organization listed in your governing document?  Yes No  (vi) Amount of monetary support (see instructions)  support (see instructions)   |     |            | • •  | -                                     |                              |                  |                 |   |                            |  |  |
| organization (described on lines 1-10 above (see instructions))  Yes No support (see instructions) support (see instructions)  |     |            |  |                                       |                              | (iv) Is the orga | nization listed | (v) Amount of monetary                  | (vi) Amount of other       |  |  |
|  |     |            | organization   |                                       |                              |                  |                 | support (see instructions)              | support (see instructions) |  |  |
| otal.  |     |            |  |                                       | above (see instructions))    | 100              | 110             |   |                            |  |  |
| otal   |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| rotal.   |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| rotal  |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| rotal  |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| otal.  |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| rotal control  |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| rotal  |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| rotal  |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
| otal   |     |            |  |                                       |                              |                  |                 |   |                            |  |  |
|  | Ot: | al         |  |                                       |                              |                  |                 |   |                            |  |  |

Schedule A (Form 990) 2022 THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 Page 2

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

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization

fails to qualify under the tests listed below, please complete Part III.) Section A. Public Support (a) 2018 Calendar year (or fiscal year beginning in) **(b)** 2019 (c) 2020 (d) 2021 (e) 2022 (f) Total 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf 3 The value of services or facilities furnished by a governmental unit to the organization without charge 4 Total. Add lines 1 through 3 ...... The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11. column (f) 6 Public support. Subtract line 5 from line 4 Section B. Total Support Calendar year (or fiscal year beginning in) (a) 2018 (b) 2019 (c) 2020 (d) 2021 (e) 2022 (f) Total 7 Amounts from line 4 ..... 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources Net income from unrelated business activities, whether or not the business is regularly carried on 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) 11 Total support. Add lines 7 through 10 12 Gross receipts from related activities, etc. (see instructions) First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here Section C. Computation of Public Support Percentage 14 14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f)) % 15 Public support percentage from 2021 Schedule A, Part II, line 14 15 % 16a 33 1/3% support test - 2022. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization b 33 1/3% support test - 2021. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization 17a 10% -facts-and-circumstances test - 2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization b 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization 18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions Schedule A (Form 990) 2022

Schedule A (Form 990) 2022 THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 Page 3

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

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to

| 0-   | ation A Dublic Courses and   | elow, please comp  |  |  |   |   |   |
|--|--|--|--|--|---|---|---|
|  | ction A. Public Support  | T  |  | T  | T   |   | _   |
|  | ndar year (or fiscal year beginning in)  | (a) 2018   | <b>(b)</b> 2019  | (c) 2020   | (d) 2021  | (e) 2022  | (f) Total   |
| 1  | Gifts, grants, contributions, and  |  |  |  |   |   |   |
|  | membership fees received. (Do not  | 45565.   | 25 4   |  |   | _   | 101100  |
|  | include any "unusual grants.")   | 1776874.   | 37,149.  | 0.   | 0.  | 0.  | 1814023.  |
| 2  | Gross receipts from admissions,<br>merchandise sold or services per-<br>formed, or facilities furnished in<br>any activity that is related to the<br>organization's tax-exempt purpose   | 62185910.  | 63532356.  | 65177053.  | 71944515.   | 87672436.   | 350512270   |
| 3  | Gross receipts from activities that  |  |  |  |   |   |   |
|  | are not an unrelated trade or bus-   |  |  |  |   |   |   |
|  | iness under section 513  |  |  |  |   |   |   |
| 4  | Tax revenues levied for the organ-   |  |  |  |   |   |   |
|  | ization's benefit and either paid to   |  |  |  |   |   |   |
|  | or expended on its behalf  |  |  |  |   |   |   |
| 5  | The value of services or facilities  |  |  |  |   |   |   |
|  | furnished by a governmental unit to  |  |  |  |   |   |   |
|  | the organization without charge  |  |  |  |   |   |   |
| 6  | Total. Add lines 1 through 5   | 63962784.  | 63569505.  | 65177053.  | 71944515.   | 87672436.   | 352326293   |
| 7a   | Amounts included on lines 1, 2, and  |  |  |  |   |   |   |
|  | 3 received from disqualified persons   | 1744449.   | 3,687.   | 405.   | 2,750.  | 3,006.  | 1754297.  |
| b  | Amounts included on lines 2 and 3 received<br>from other than disqualified persons that<br>exceed the greater of \$5,000 or 1% of the  |  |  |  |   |   |   |
|  | amount on line 13 for the year   |  |  |  |   |   | 0.  |
| c  | Add lines 7a and 7b  | 1744449.   | 3,687.   | 405.   | 2,750.  | 3,006.  | 1754297.  |
|  | Public support. (Subtract line 7c from line 6.)  |  |  |  |   |   | 350571996   |
|  | ction B. Total Support   |  |  |  |   |   |   |
| Cale   | ndar year (or fiscal year beginning in)  | (a) 2018   | <b>(b)</b> 2019  | (c) 2020   | (d) 2021  | (e) 2022  | (f) Total   |
| 9  | Amounts from line 6  | 63962784.  | 63569505.  | 65177053.  | 71944515.   | 87672436.   | 352326293   |
|  | Gross income from interest,<br>dividends, payments received on<br>securities loans, rents, royalties,<br>and income from similar sources   | 694,948.   | 681,434.   | 61,570.  | 94,242.   | 2337763.  | 3869957.  |
| b  | Unrelated business taxable income  |  |  |  |   |   |   |
|  | Management of the state of the  |  | l  | Î  |   |   |   |
|  | (less section 511 taxes) from businesses   |  |  |  |   |   |   |
|  | acquired after June 30, 1975   | 601 010  | 691 121  | 61 570   | 04 242  | 2227762   | 3960057   |
| 11   | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on   | 694,948.   | 681,434.   | 61,570.  | 94,242.   | 2337763.  | 3869957.  |
| 11   | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  | 317,199.   | 63,595.  | 12,000.  | 58,296.   | 27,696.   | 478,786.  |
| 11<br>12   | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  |  | 63,595.  | 12,000.  | 58,296.   | 27,696.   | 478,786.  |
| 11<br>12<br>13   | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  | 317,199.<br>64974931.  | 63,595.<br>64314534.   | 12,000.<br>65250623.   | 58,296.<br>72097053.  | 27,696.<br>90037895.  | 478,786.<br>356675036   |
| 11<br>12<br>13<br>14                                       | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here  | 317,199.<br>64974931.<br>ne organization's fi  | 63,595.<br>64314534.<br>rst, second, third,  | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>year as a section 5   | 27,696。<br>90037895。<br>01(c)(3) organizatio  | 478,786.<br>356675036   |
| 11<br>12<br>13<br>14                                       | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the   | 317,199.<br>64974931.<br>ne organization's fi  | 63,595.<br>64314534.<br>rst, second, third,  | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>year as a section 5   | 27,696。<br>90037895。<br>01(c)(3) organizatio  | 478,786.<br>356675036<br>on,  |
| 11<br>12<br>13<br>14<br>Sec                                | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here  | 317,199.<br>64974931.<br>ne organization's fii   | 63,595.<br>64314534.<br>rst, second, third,  | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>year as a section 5   | 27,696。<br>90037895。<br>01(c)(3) organizatio  | 478,786.<br>356675036<br>on,<br>98.29 %                               |
| 11<br>12<br>13<br>14<br><b>Sec</b><br>15<br>16             | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here ction C. Computation of Public support percentage for 2022 (Public support percentage from 2021)   | 317,199.<br>64974931.<br>ne organization's fil<br>fic Support Per<br>line 8, column (f), d<br>I Schedule A, Part   | 63,595.<br>64314534.<br>rst, second, third,<br>centage<br>ivided by line 13, o   | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>vear as a section 5   | 27,696.<br>90037895.<br>01(c)(3) organization   | 478,786.<br>356675036   |
| 11<br>12<br>13<br>14<br>Sec<br>15<br>16<br>Sec             | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here cotion C. Computation of Public Public support percentage from 2021 (Ction D. Computation of Investigation)  | 317,199.<br>64974931.<br>The organization's fining Support Per<br>line 8, column (f), do   | 63,595. 64314534. rst, second, third, centage ivided by line 13, of the second  | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>rear as a section 5   | 27,696.<br>90037895.<br>01(c)(3) organization   | 478,786.<br>356675036<br>on,<br>98.29 %<br>97.34 %                    |
| 11<br>12<br>13<br>14<br>Sec<br>15<br>16<br>Sec<br>17       | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here exiting C. Computation of Public support percentage for 2022 (Public support percentage from 2021 oction D. Computation of Investing Investment income percentage for 2021 investment investment in 2021 investment investment investment investment i | 317,199.<br>64974931.<br>ne organization's fin<br>ic Support Per<br>line 8, column (f), d<br>I Schedule A, Part<br>stment Income   | 63,595. 64314534. rst, second, third, centage ivided by line 13, of the percentage nn (f), divided by li   | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>rear as a section 5   | 27,696.<br>90037895.<br>01(c)(3) organizatio  | 478,786.<br>356675036<br>on,<br>98.29 %<br>97.34 %                    |
| 11<br>12<br>13<br>14<br>Sec<br>15<br>16<br>Sec<br>17<br>18 | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here exion C. Computation of Public support percentage for 2022 (Public support percentage from 2021 extion D. Computation of Investment income percentage from 2011 investment | 317,199. 64974931. ne organization's fine Support Per line 8, column (f), d Schedule A, Part stment Income 022 (line 10c, colur 2021 Schedule A,   | 63,595. 64314534. rst, second, third, rethree ivided by line 13, or Percentage nn (f), divided by li Part III, line 17   | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>Year as a section 5   | 27,696.<br>90037895.<br>01(c)(3) organization   | 478,786.<br>356675036<br>on,<br>98.29 %<br>97.34 %<br>1.09 %<br>.55 % |
| 11<br>12<br>13<br>14<br>Sec<br>15<br>16<br>Sec<br>17<br>18 | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here cotion C. Computation of Public support percentage for 2022 (Public support percentage from 2021 cotion D. Computation of Investment income percentage from a 31/3% support tests - 2022. If the   | 317,199.<br>64974931.<br>ne organization's fil<br>fic Support Per<br>line 8, column (f), d<br>I Schedule A, Part<br>stment Income<br>2021 (line 10c, colur<br>2021 Schedule A,<br>e organization did n | 63,595. 64314534. rst, second, third, ret, second, third, ret, second, third, rst, second, third, rst, second, third, rst, second, third, ret, sec | 12,000.<br>65250623.<br>fourth, or fifth tax y   | 58,296.<br>72097053.<br>/ear as a section 5   | 27,696.<br>90037895.<br>01(c)(3) organization<br>15<br>16                                   | 478,786. 356675036  on,  98.29 % 97.34 %  1.09 % .55 % 7 is not       |
| 11<br>12<br>13<br>14<br>15<br>16<br>Sec<br>17<br>18<br>19a | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here exion C. Computation of Public support percentage for 2022 (Public support percentage from 2021 extion D. Computation of Investment income percentage from 2011 investment | 317,199. 64974931. ne organization's file ic Support Per line 8, column (f), d I Schedule A, Part stment Income 022 (line 10c, colum 2021 Schedule A, e organization did n and stop here. The          | 63,595. 64314534. rst, second, third, ret, sec | 12,000. 65250623. fourth, or fifth tax y column (f)) ne 13, column (f)) on line 14, and line fies as a publicly si                   | 58,296.<br>72097053.<br>rear as a section 5   | 27,696.<br>90037895.<br>01(c)(3) organization<br>15<br>16<br>17<br>18<br>3 1/3%, and line 1 | 478,786. 356675036  DON,  98.29 % 97.34 %  1.09 % .55 % 7 is not  X   |
| 11<br>12<br>13<br>14<br>15<br>16<br>Sec<br>17<br>18<br>19a | acquired after June 30, 1975  Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)  Total support. (Add lines 9, 10c, 11, and 12.)  First 5 years. If the Form 990 is for the check this box and stop here  Ction C. Computation of Public support percentage for 2022 (Public support percentage from 2021 ction D. Computation of Investment income percentage from a 33 1/3% support tests - 2022. If the more than 33 1/3%, check this box and stop test a 33 1/3%, check this box and stop test and support percentage from a 33 1/3%, check this box and stop test and support tests - 2022.  | 317,199. 64974931. ne organization's file fic Support Per line 8, column (f), d Schedule A, Part stment Income 022 (line 10c, colur 2021 Schedule A, e organization did n nd stop here. The            | 63,595. 64314534. est, second, third, secondage ivided by line 13, of the percentage inn (f), divided by line 17 ot check the box of the organization quality of check a box on the secondage in the percentage in | 12,000.<br>65250623.<br>fourth, or fifth tax y<br>column (f))<br>ne 13, column (f))<br>on line 14, and line<br>fies as a publicly si | 58,296. 72097053.  Year as a section 5  The section 5 is more than 3 is apported organizar, and line 16 is mo | 27,696.<br>90037895.<br>01(c)(3) organization   | 478,786. 356675036  DON,  98.29 % 97.34 %  1.09 % .55 % 7 is not  X   |

Schedule A (Form 990) 2022

### THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 Page 4

## Part IV Supporting Organizations

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

### Section A. All Supporting Organizations

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

|     |         | Yes    | No   |
|-----|---------|--------|------|
|     |         |        |      |
|     | 1       |        |      |
|     |         |        |      |
|     | 2       |        |      |
|     |         |        |      |
|     | 3a      |        |      |
|     |         |        |      |
|     | 3b      |        |      |
|     |         |        |      |
|     | 3с      |        |      |
|     |         |        |      |
|     | 4a      |        |      |
|     |         |        |      |
|     | 4b      |        |      |
|     |         |        |      |
|     | 4c      |        |      |
|     |         |        |      |
|     | 5a      |        |      |
|     | - Gu    |        |      |
|     | 5b      |        |      |
|     | 5c      |        |      |
|     |         |        |      |
|     | 6       |        |      |
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|     | 7       |        |      |
|     |         |        |      |
|     | 8       |        |      |
|     | 9a      |        |      |
|     | Ja      |        |      |
|     | 9b      |        |      |
|     | 9c      |        |      |
|     |         |        |      |
|     | 10a     |        |      |
|     |         |        |      |
|     | 10b     |        |      |
| ulo | A (Form | n 000) | 2022 |

|     | dule A (Form 990) 2022 THE AMERICAN BOARD OF INTERNAL MEDICINE 39-08  | 6622      | 8 Pa | age <b>5</b> |
|-----|---|-----------|------|--------------|
| Par | t IV   Supporting Organizations <sub>(continued)</sub>  |           |      |              |
|     |   |           | Yes  | No           |
| 11  | Has the organization accepted a gift or contribution from any of the following persons?   |           |      |              |
| а   | A person who directly or indirectly controls, either alone or together with persons described on lines 11b and  |           |      |              |
|     | 11c below, the governing body of a supported organization?  | 11a       |      |              |
| b   | A family member of a person described on line 11a above?  | 11b       |      |              |
| С   | A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide  |           |      |              |
|     | detail in Part VI.  | 11c       |      |              |
| Sec | tion B. Type I Supporting Organizations   |           |      |              |
|     |   |           | Yes  | No           |
| 1   | Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or  |           |      |              |
|     | more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers,   |           |      |              |
|     | directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported |           |      |              |
|     | organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the  |           |      |              |
|     | supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.  | 1         |      |              |
| 2   | Did the organization operate for the benefit of any supported organization other than the supported   |           |      |              |
|     | organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in  |           |      |              |
|     | Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,   |           |      |              |
|     | supervised, or controlled the supporting organization.  | 2         |      |              |
| Sec | tion C. Type II Supporting Organizations  |           |      |              |
|     |   |           | Yes  | No           |
| 1   | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors  |           |      |              |
|     | or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control   |           |      |              |
|     | or management of the supporting organization was vested in the same persons that controlled or managed  |           |      |              |
|     | the supported organization(s).  | 1         |      |              |
| Sec | tion D. All Type III Supporting Organizations   |           |      |              |
|     |   |           | Yes  | No           |
| 1   | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the  |           |      |              |
|     | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax   |           |      |              |
|     | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the  |           |      |              |
|     | organization's governing documents in effect on the date of notification, to the extent not previously provided?  | 1         |      |              |
| 2   | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported  |           |      |              |
|     | organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how  |           |      |              |
|     | the organization maintained a close and continuous working relationship with the supported organization(s).   | 2         |      |              |
| 3   | By reason of the relationship described on line 2, above, did the organization's supported organizations have a   |           |      |              |
|     | significant voice in the organization's investment policies and in directing the use of the organization's  |           |      |              |
|     | income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's  |           |      |              |
|     | supported organizations played in this regard.  | 3         |      |              |
| Sec | tion E. Type III Functionally Integrated Supporting Organizations   |           |      |              |
| 1   | Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)  |           |      |              |
| а   | The organization satisfied the Activities Test. Complete line 2 below.  |           |      |              |
| b   | The organization is the parent of each of its supported organizations. Complete line 3 below.   |           |      |              |
| С   | The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see in   | struction | s).  |              |
| 2   | Activities Test. Answer lines 2a and 2b below.  |           | Yes  | No           |
| а   | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of  |           |      |              |
|     | the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify  |           |      |              |
|     | those supported organizations and explain how these activities directly furthered their exempt purposes,  |           |      |              |
|     | how the organization was responsive to those supported organizations, and how the organization determined   |           |      |              |
|     | that these activities constituted substantially all of its activities.  | 2a        |      |              |
| b   | Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement,   |           |      |              |
|     | one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in  |           |      |              |
|     | Part VI the reasons for the organization's position that its supported organization(s) would have engaged in  |           |      |              |
|     | these activities but for the organization's involvement.  | 2b        |      |              |
| 3   | Parent of Supported Organizations. <b>Answer lines 3a and 3b below.</b>   |           |      |              |
| а   | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or   |           |      |              |
|     | trustees of each of the supported organizations? If "Yes" or "No" provide details in Part VI.   | За        |      |              |
| b   | Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each   |           |      |              |
|     | of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.   | 3b        |      |              |

|       | dule A (Form 990) 2022 THE AMERICAN BOARD OF II                                  |            |                                  | 39-0866228 Page 6              |
|-------|--|------------|----------------------------------|--------------------------------|
| Par   | 3,1  |            |                                  |                                |
| 1     | Check here if the organization satisfied the Integral Part Test as a qualifying  | g trust or | n Nov. 20, 1970 ( <i>explain</i> | in Part VI). See instructions. |
|       | All other Type III non-functionally integrated supporting organizations must     | complet    | e Sections A through E.          |                                |
| Secti | ion A - Adjusted Net Income  |            | (A) Prior Year                   | (B) Current Year<br>(optional) |
| 1     | Net short-term capital gain  | 1          |                                  |                                |
| 2     | Recoveries of prior-year distributions   | 2          |                                  |                                |
| 3     | Other gross income (see instructions)  | 3          |                                  |                                |
| 4     | Add lines 1 through 3.   | 4          |                                  |                                |
| 5     | Depreciation and depletion   | 5          |                                  |                                |
| 6     | Portion of operating expenses paid or incurred for production or                 |            |                                  |                                |
|       | collection of gross income or for management, conservation, or                   |            |                                  |                                |
|       | maintenance of property held for production of income (see instructions)         | 6          |                                  |                                |
| 7     | Other expenses (see instructions)  | 7          |                                  |                                |
| 8     | Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)                     | 8          |                                  |                                |
| Secti | ion B - Minimum Asset Amount   | _          | (A) Prior Year                   | (B) Current Year<br>(optional) |
| 1     | Aggregate fair market value of all non-exempt-use assets (see                    |            |                                  |                                |
|       | instructions for short tax year or assets held for part of year):                |            |                                  |                                |
| a     | Average monthly value of securities  | 1a         |                                  |                                |
| b     | Average monthly cash balances  | 1b         |                                  |                                |
| c     | Fair market value of other non-exempt-use assets                                 | 1c         |                                  |                                |
| d     | Total (add lines 1a, 1b, and 1c)   | 1d         |                                  |                                |
| е     | Discount claimed for blockage or other factors                                   |            |                                  |                                |
|       | (explain in detail in Part VI):  |            |                                  |                                |
| 2     | Acquisition indebtedness applicable to non-exempt-use assets                     | 2          |                                  |                                |
| _3_   | Subtract line 2 from line 1d.  | 3          |                                  |                                |
| 4     | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount,      |            |                                  |                                |
|       | see instructions).   | 4          |                                  |                                |
| _5    | Net value of non-exempt-use assets (subtract line 4 from line 3)                 | 5          |                                  |                                |
| _6    | Multiply line 5 by 0.035.  | 6          |                                  |                                |
| _7_   | Recoveries of prior-year distributions   | 7          |                                  |                                |
| 8     | Minimum Asset Amount (add line 7 to line 6)                                      | 8          |                                  |                                |
| Secti | ion C - Distributable Amount   |            |                                  | Current Year                   |
| 1     | Adjusted net income for prior year (from Section A, line 8, column A)            | 1          |                                  |                                |
| 2     | Enter 0.85 of line 1.  | 2          |                                  |                                |
| 3     | Minimum asset amount for prior year (from Section B, line 8, column A)           | 3          |                                  |                                |
| 4     | Enter greater of line 2 or line 3.   | 4          |                                  |                                |
| 5     | Income tax imposed in prior year   | 5          |                                  |                                |
| 6     | Distributable Amount. Subtract line 5 from line 4, unless subject to             |            |                                  |                                |
|       | emergency temporary reduction (see instructions).                                | 6          |                                  |                                |
| 7     | Check here if the current year is the organization's first as a non-functionally | y integra  | ted Type III supporting o        | organization (see              |

Schedule A (Form 990) 2022

THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 Page 7 Schedule A (Form 990) 2022 Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued) **Current Year** Section D - Distributions 1 Amounts paid to supported organizations to accomplish exempt purposes 1 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity 2 Administrative expenses paid to accomplish exempt purposes of supported organizations 3 4 Amounts paid to acquire exempt-use assets 5 Qualified set-aside amounts (prior IRS approval required - provide details in Part VI) 5 6 Other distributions (describe in Part VI). See instructions. 6 7 7 Total annual distributions. Add lines 1 through 6. Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions. 8 9 Distributable amount for 2022 from Section C, line 6 10 10 Line 8 amount divided by line 9 amount (i) (ii) Underdistributions Distributable **Excess Distributions** Section E - Distribution Allocations (see instructions) Amount for 2022 Pre-2022 Distributable amount for 2022 from Section C, line 6 2 Underdistributions, if any, for years prior to 2022 (reasonable cause required - explain in Part VI). See instructions. 3 Excess distributions carryover, if any, to 2022 **a** From 2017 **b** From 2018 c From 2019 **d** From 2020 e From 2021 f Total of lines 3a through 3e g Applied to underdistributions of prior years h Applied to 2022 distributable amount i Carryover from 2017 not applied (see instructions) j Remainder. Subtract lines 3g, 3h, and 3i from line 3f. 4 Distributions for 2022 from Section D, line 7: a Applied to underdistributions of prior years **b** Applied to 2022 distributable amount c Remainder. Subtract lines 4a and 4b from line 4. 5 Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions 6 Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions. 7 Excess distributions carryover to 2023. Add lines 3i and 4c. 8 Breakdown of line 7: a Excess from 2018 **b** Excess from 2019 c Excess from 2020 d Excess from 2021

Schedule A (Form 990) 2022

e Excess from 2022

| Schedule | A (Form 990              |                            |                                       |                                  |                                       |                                      |                              |  | 39-0866228   | Page 8        |
|----------|--------------------------|----------------------------|---------------------------------------|----------------------------------|---------------------------------------|--------------------------------------|------------------------------|--|--|---------------|
| Part V   | Part IV, S<br>line 1; Pa | Section A,<br>art IV, Sect | lines 1, 2, 3b, 3<br>ion D, lines 2 a | c, 4b, 4c, 5a,<br>nd 3; Part IV, | 6, 9a, 9b, 9c, 11<br>Section E, lines | a, 11b, and 11d<br>1c, 2a, 2b, 3a, a | c; Part IV, S<br>and 3b; Par | Section B, lines 1<br>rt V, line 1; Part V | 17b; Part III, line 12;<br>and 2; Part IV, Section<br>, Section B, line 1e; Pa | ı C,<br>rt V, |
|          | (See instr               |                            | o, and 8; and P                       | art v, Section                   | E, lines 2, 5, and                    | a 6. Also compi                      | ete tnis pai                 | rt for any addition                        | iai information.   |               |
| SCHEI    | DULE A,                  | PART                       | III, LI                               | NE 12,                           | EXPLANAT                              | ION FOR                              | OTHER                        | R INCOME:                                  |  |               |
| OTHER    | RINCOM                   | E                          |                                       |                                  |                                       |                                      |                              |  |  |               |
| 2018     | AMOUNT                   | : \$                       | 317,199                               |                                  |                                       |                                      |                              |  |  |               |
| 2019     | AMOUNT                   | : \$                       | 63,595.                               |                                  |                                       |                                      |                              |  |  |               |
| 2020     | AMOUNT                   | : \$                       | 12,000.                               |                                  |                                       |                                      |                              |  |  |               |
| 2021     | AMOUNT                   | : \$                       | 58,296.                               |                                  |                                       |                                      |                              |  |  |               |
| 2022     | AMOUNT                   | : \$                       | 27,696.                               |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |
|          |                          |                            |                                       |                                  |                                       |                                      |                              |  |  |               |

Schedule A (Form 990) 2022

## **SCHEDULE D** (Form 990)

Department of the Treasury

## **Supplemental Financial Statements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Inspection

Internal Revenue Service Name of the organization

**Employer identification number** 

|     | THE AMERICAN BOARD  |                                     |                            | 39-0866228                      |
|-----|---|-------------------------------------|----------------------------|---------------------------------|
| Par |   |                                     | similar Funds or Ad        | CCOUNTS. Complete if the        |
|     | organization answered "Yes" on Form 990, Part IV, lin                   | 1                                   |                            |                                 |
|     |   | (a) Donor advise                    | ed funds                   | (b) Funds and other accounts    |
| 1   | Total number at end of year   |                                     |                            |                                 |
| 2   | Aggregate value of contributions to (during year)                       |                                     |                            |                                 |
| 3   | Aggregate value of grants from (during year)                            |                                     |                            |                                 |
| 4   | Aggregate value at end of year  |                                     |                            |                                 |
| 5   | Did the organization inform all donors and donor advisors in v          | ~                                   |                            |                                 |
|     | are the organization's property, subject to the organization's $ \\$    | exclusive legal control?            |                            | Yes No                          |
| 6   | Did the organization inform all grantees, donors, and donor a           | dvisors in writing that gr          | ant funds can be used o    | only                            |
|     | for charitable purposes and not for the benefit of the donor o          | r donor advisor, or for ar          | ny other purpose confer    | ring                            |
|     | impermissible private benefit?  |                                     |                            |                                 |
| Par | t II Conservation Easements. Complete if the org                        | ganization answered "Ye             | s" on Form 990, Part IV    | , line 7.                       |
| 1   | Purpose(s) of conservation easements held by the organization           | on (check all that apply).          | _                          |                                 |
|     | Preservation of land for public use (for example, recrea                | tion or education)                  | Preservation of a histo    | orically important land area    |
|     | Protection of natural habitat   |                                     | Preservation of a cert     | ified historic structure        |
|     | Preservation of open space  |                                     |                            |                                 |
| 2   | Complete lines 2a through 2d if the organization held a qualif          | fied conservation contrib           | ution in the form of a co  | nservation easement on the last |
|     | day of the tax year.  |                                     |                            | Held at the End of the Tax Year |
| а   | Total number of conservation easements                                  |                                     |                            | 2a                              |
| b   | Total acreage restricted by conservation easements                      |                                     |                            | 2b                              |
| С   | Number of conservation easements on a certified historic stru           | ucture included in (a)              |                            | 2c                              |
| d   | Number of conservation easements included in (c) acquired a             | after July 25,2006, and n           | ot on a                    |                                 |
|     | historic structure listed in the National Register                      |                                     |                            | 2d                              |
| 3   | Number of conservation easements modified, transferred, rel             | eased, extinguished, or             | terminated by the organ    | ization during the tax          |
|     | year  |                                     |                            |                                 |
| 4   | Number of states where property subject to conservation eas             | sement is located                   |                            |                                 |
| 5   | Does the organization have a written policy regarding the per           | iodic monitoring, inspec            | tion, handling of          |                                 |
|     | violations, and enforcement of the conservation easements it            | holds?                              |                            | Yes No                          |
| 6   | Staff and volunteer hours devoted to monitoring, inspecting,            | handling of violations, a           | nd enforcing conservation  | on easements during the year    |
|     |   |                                     |                            |                                 |
| 7   | Amount of expenses incurred in monitoring, inspecting, hand             | lling of violations, and er         | nforcing conservation ea   | sements during the year         |
|     |   |                                     |                            |                                 |
| 8   | Does each conservation easement reported on line 2(d) abov              | e satisfy the requiremen            | ts of section 170(h)(4)(B) | )(i)                            |
|     | and section 170(h)(4)(B)(ii)?   |                                     |                            |                                 |
| 9   | In Part XIII, describe how the organization reports conservation        | on easements in its reve            | nue and expense statem     | nent and                        |
|     | balance sheet, and include, if applicable, the text of the footn        | note to the organization's          | s financial statements th  | at describes the                |
| D : | organization's accounting for conservation easements.                   | . A. a. 112 - 1 - 2 1 <del>22</del> |                            | N' and a state                  |
| Pai | t III Organizations Maintaining Collections of                          |                                     | asures, or Other S         | similar Assets.                 |
|     | Complete if the organization answered "Yes" on Form                     | 990, Part IV, line 8.               |                            |                                 |
| 1a  | If the organization elected, as permitted under FASB ASC 95             | •                                   |                            |                                 |
|     | of art, historical treasures, or other similar assets held for pub      | olic exhibition, education          | , or research in furtherar | nce of public                   |
|     | service, provide in Part XIII the text of the footnote to its finar     | ncial statements that des           | scribes these items.       |                                 |
| b   | If the organization elected, as permitted under FASB ASC 95             | 8, to report in its revenu          | e statement and balance    | e sheet works of                |
|     | art, historical treasures, or other similar assets held for public      | exhibition, education, o            | r research in furtherance  | e of public service,            |
|     | provide the following amounts relating to these items:                  |                                     |                            |                                 |
|     | (i) Revenue included on Form 990, Part VIII, line 1                     |                                     |                            | \$                              |
|     |   |                                     |                            | •                               |
| 2   | If the organization received or held works of art, historical treatment | asures, or other similar a          | ssets for financial gain,  | provide                         |
|     | the following amounts required to be reported under FASB A              | SC 958 relating to these            | items:                     |                                 |
| а   | Revenue included on Form 990, Part VIII, line 1                         |                                     |                            | \$                              |
| b   | Assets included in Form 990, Part X                                     |                                     |                            | \$                              |
|     | For Paperwork Reduction Act Notice, see the Instructions                |                                     |                            | Schedule D (Form 990) 2022      |

232051 09-01-22

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

| Bart III   Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets   |      |  | RICAN BOAR                 |            |                |                     |             |             | 39-08        |            |        | ge <b>2</b>   |
|--|------|--|----------------------------|------------|----------------|---------------------|-------------|-------------|--------------|------------|--------|---------------|
| a   Potic exhibition   d   Loan or exchange program   b   Scholarly research   e   Other   C   Preservation for future generations   d   Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.  5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be said to raise funder started than to be maintained as part of the organization's exempt purpose in Part XIII.  5 During the year, did the organization and explain how they further the organization's exempt purpose in Part XIII.  5 During the year, did the organization and collection?   Yes   No   Part W   Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part X, line 21.  1a is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included an Form 990, Part X, line 21.  1a is the organization and poly part X, line 21.  1b   Seginning balance   1c   Amount   1c   C   C   C    2 Beginning balance   1c   C   C   C    2 Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?   Yes   No    3 Did the organization include an amount on Form 990, Part X, line 21, for escrow or outstodial account liability?   Yes   No    4 Did the organization include an amount on Form 990, Part X, line 21, for escrow or outstodial account liability?   Yes   No    5 Difference   1c   C   C   C   C   C   C   C   C   C  | Par  | •  |                            |            |                |                     |             |             |              | (continu   | ıed)   |               |
| a Public exhibition d Loan or exchange program b Scholarly research c Preservation for future generations 4 Provide a description of the organization's collections and explain how they threfr the organization's oxempt purpose in Part XIII. 5 During the year, did the organization's socilor or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Ves No Part IV Excrow and Custodial Arrangements. The properties an amount on Form 990, Part X, line 21.  Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X; line 21.  Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X; line 21.  Is 1'Yes, "explain the arrangement in Part XIII and complete the following table:  Additions during the year  Beginning balance  Beginning balance  Cab Bid the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account tiability?  Part V Endowment Funds. Complete if the explanation has been provided on part XIII  Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part X, line 10.  Beginning of year balance  Contributions  Is Beginning of year balance  Contributions  A Contribution of receive and one of the current year and balance (line 1g, column (al) held as:  B Contributions  B Contributions  A Contribution of property  B Contribution of property  B Contribution of property  B Contribution of property  B Contrib | 3    |  | on, and other record       | ls, checl  | k any of the f | following tha       | t make siç  | gnificant ι | use of its   |            |        |               |
| b Scholarly research c Preservation for future generations  c Preservation for future generations  d Provide a description of the organizations solicit or receive donations of art, historical treasures, or other similar assets to be soft or asie funds arther than to be maintained as part of the organization (or solicit or receive donations of art, historical treasures, or other similar assets to be soft or asie funds arther than to be maintained as part of the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.  1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  b If "Yes," explain the arrangement in Part XIII and complete the following table:  C Beginning balance  d Additions during the year  e Distributions during the year  f Ending balance  2a Did the organization include an amount on Form 990, Part X, line 21, for secrow or custodial account liability?  Yes No  If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII  B Eleginning of year balance  (a) Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back  G Grants or achicatalpiae  C Net investment earnings, gains, and losses  G Grants or achicatalpiae  G Other expenditures for facilities  and programs  T Administrative expenses  g End of year balance  D Permanent endowment  56  Term endowment  56  Term endowment  57  Term endowment  59  Permanent endowment  50  Term endowme |      |  |                            |            |                |                     |             |             |              |            |        |               |
| c Preservation for future generations 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII. 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization answered 'Yes' on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.  1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21.  1b If 'Yes,' explain the arrangement in Part XIII and complete the following table:   | а    |  | (                          | # <u> </u> |                |                     |             |             |              |            |        |               |
| 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.  5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maritained as part of the organization's collection?  Part VI Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.  1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21.  1b Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21.  1c Beginning balance  1d Amount  1c Amount  1c Amount  1c Amount  1c Individual and Indivi | b    |  | •                          | • 📖        | Other          |                     |             |             |              |            |        |               |
| 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Part IV   Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 9, or reported an amount on Form 990, Part IV, line 11 d.  If 'Yes,' explain the arrangement in Part XIII and complete the following table:  Beginning balance   1d   | С    |  |                            |            |                |                     |             |             |              |            |        |               |
| to be sold to raise funds rather than to be maintained as part of the organization's collection?  Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.  Is its the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21.  Is its the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21 for secrow or custodial account liability.  C Beginning balance  It Intermediary to reserve the part of the cryanization include an amount on Form 990, Part X, line 21, for secrow or custodial account liability?  Part V Endowment Funds. Complete if the organization has been provided on Part XIII  Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part X, line 10.  Beginning of year balance  In Beginning of year balance  In Contributions  In Administrative expenses  In Beginning of year balance  Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:  Board designated or quasis-endowment  96  The percentiques for facilities  and programs  In Administrative expenses  In Part V Endowment funds not in the possession of the organization that are held and administered for the organization by:  Ves No  10 Unrelated organizations  11 Part V Endowment funds not in the possession of the organization that are held and administered for the organization by:  Ves No  12 Port V Endowment funds not in the possession of the organization that are held and administered for the organization by:  Ves No  13 Part V Endowment funds not in the possession of the organization that are held and administered for the organization by:  Ves No  14 Describe in Part XIII the Intended uses of the organiza |      | •  | · ·                        |            | -              | -                   |             |             | se in Part   | XIII.      |        |               |
| Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.  1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?    Ves   | 5    |  |                            |            |                | •                   |             |             |              | ٦          |        |               |
| reported an amount on Form 990, Part X, line 21.  1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21, for escribing the search of the different part XIII and complete the following table:    Complete If the organization include an amount on Form 990, Part X, line 21, for escribing the year of the part XIII and the part XIII and complete the following table:    Complete If the organization include an amount on Form 990, Part X, line 21, for escribing the year of the part X organization include an amount on Form 990, Part X, line 21, for escribing the year of the part XIII and the part XIII. Check here if the explanation has been provided on Part XIII and the part XIIII and the part XIII and the part XIII and the pa | Dor  |  |                            |            |                |                     |             |             |              |            |        | No            |
| 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?    Ves   | Fai  |  |                            | ete if the | e organizatio  | n answered          | "Yes" on    | Form 990    | , Part IV, I | ine 9, or  |        |               |
| on Form 990, Part X?  b If "Yes," explain the arrangement in Part XIII and complete the following table:  Amount  1c Beginning balance  1d   |      |  |                            | lion, for  | oontribution.  | 0 0 × 0 + h 0 × 0 0 | aata nat ir | aaludad     |              |            |        |               |
| b If "Yes," explain the arrangement in Part XIII and complete the following table:    C   Beginning balance  | та   |  |                            | •          |                |                     |             |             |              | 7 v.s      |        | N.            |
| c Beginning balance d Additions during the year e Distributions during the year f Ending balance 2 Distributions during the year f Ending balance Both de organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Ves No b If 'Yes,' explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII Part V Endowment Funds. Complete if the organization answered 'Yes' on Form 990, Part N, line 10.    Part V Endowment Funds. Complete if the organization answered 'Yes' on Form 990, Part N, line 10.   Part V Endowment Funds. Complete if the organization answered 'Yes' on Form 990, Part N, line 10.   Part V Endowment Funds. Complete if the organization in that are held and administered for the organization by:   Part V Endowment  | L    |  |                            |            |                |                     |             |             |              | 」 res      | Ш      | NO            |
| c Beginning balance d Additions during the year e Distributions during the year 1 te 1 tr 1 tr 2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No If Yes, explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII.    Part V   Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.   Table   Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.   Table   Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.   Table   Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.   Table   Endowment   Endo | b    | ii res, explain the arrangement in Part XIII | and complete the lo        | llowing    | lable.         |                     |             |             |              | Amount     |        | —             |
| d Additions during the year  f Ending balance  2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Ves No If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII  Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.  [a] Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back (e) Four years back (e) Four years back (for the years | _    | Paginning halange                            |                            |            |                |                     |             | 10          |              | 711100111  |        | —             |
| e Distributions during the year  f Ending balance 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes No b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII  Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IX, line 10.  [a] Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back (for the organization answered the organization answered the organization answered the organization and the organization basis (investment)  Description of property  (a) Cost or other basis (investment)  [a] Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back (for Two |      |  |                            |            |                |                     |             |             |              |            |        |               |
| f Ending balance  2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Part V Endowment Funds. Complete if the explanation has been provided on Part XIII    Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.    (a) Current year   (b) Prior year   (c) Two years back   (d) Three years back   (e) Four years back  |      |  |                            |            |                |                     |             |             |              |            |        |               |
| 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IX, line 10.    Complete if the organization answered "Yes" on Form 990, Part IX, line 10.    Complete if the organization answered "Yes" on Form 990, Part IX, line 10.    Complete if the organization answered in Septiment (a) Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back (e) Foury | f    |  |                            |            |                |                     |             |             |              |            |        |               |
| Part V   Endowment Funds. Complete if the explanation has been provided on Part XIII   Part V   Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.    1a   Beginning of year balance   (a) Current year   (b) Prior year   (c) Two years back   (d) Three years back   (e) Four years back   (d) Three years back   (e) Four years back   (d) Three years back   (e) Four years back      | 2a   |  |                            |            |                |                     |             |             |              | Yes        |        | No            |
| Part V   Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.   (a) Current year   (b) Prior year   (c) Two years back   (d) Three years back   (e) Four years back   |      | _  |                            |            |                |                     |             | •           |              | _          | 一      |               |
| (a) Current year   (b) Prior year   (c) Two years back   (d) Three years back   (e) Four years back   (d) Three years back   (e) Four years   (e) Four years back   (e) Four years      |      |  |                            |            |                |                     |             |             |              |            |        |               |
| b Contributions c Net investment earnings, gains, and losses d Grants or scholarships c Other expenditures for facilities and programs f Administrative expenses g End of year balance c Grants or quasi-endowment 9% b Permanent endowment 9% The percentages on lines 2a, 2b, and 2c should equal 100%.  3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:  (i) Unrelated organizations (ii) Related organizations listed as required on Schedule R? 3a(ii) 3a(ii) 3a(ii) 3a(ii) 4 Describe in Part XIII the intended uses of the organization's endowment funds not an every complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of  |      | •  |                            |            |                |                     |             |             | ears back    | (e) Four y | ears b | ack           |
| b Contributions c Net investment earnings, gains, and losses d Grants or scholarships c Other expenditures for facilities and programs f Administrative expenses g End of year balance c Grants or quasi-endowment 9% b Permanent endowment 9% The percentages on lines 2a, 2b, and 2c should equal 100%.  3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:  (i) Unrelated organizations (ii) Related organizations listed as required on Schedule R? 3a(ii) 3a(ii) 3a(ii) 3a(ii) 4 Describe in Part XIII the intended uses of the organization's endowment funds not an every complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of the organization's endowment funds.  Describe in Part XIII the intended uses of  | 1a   | Beginning of year balance                    |                            |            |                |                     |             |             |              |            |        |               |
| c Net investment earnings, gains, and losses d Grants or scholarships e Other expenditures for facilities and programs f Administrative expenses g End of year balance 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: a Board designated or quasi-endowment   | b    |  |                            |            |                |                     |             |             |              |            |        |               |
| e Other expenditures for facilities and programs  f Administrative expenses g End of year balance 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: a Board designated or quasi-endowment  | С    |  |                            |            |                |                     |             |             |              |            |        |               |
| e Other expenditures for facilities and programs  f Administrative expenses g End of year balance 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: a Board designated or quasi-endowment  | d    | Grants or scholarships                       |                            |            |                |                     |             |             |              |            |        |               |
| g End of year balance  | е    |  |                            |            |                |                     |             |             |              |            |        |               |
| g End of year balance  |      | and programs                                 |                            |            |                |                     |             |             |              |            |        |               |
| Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:  a Board designated or quasi-endowment   | f    | Administrative expenses                      |                            |            |                |                     |             |             |              |            |        |               |
| a Board designated or quasi-endowment  | g    | End of year balance                          |                            |            |                |                     |             |             |              |            |        |               |
| b Permanent endowment  | 2    | Provide the estimated percentage of the curr | rent year end balanc       | e (line 1  | g, column (a)  | )) held as:         |             |             |              |            |        |               |
| c Term endowment   | а    | Board designated or quasi-endowment          |                            | %          |                |                     |             |             |              |            |        |               |
| The percentages on lines 2a, 2b, and 2c should equal 100%.  3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:  (i) Unrelated organizations  (ii) Related organizations  b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?  4 Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (investment)  b Buildings  c Leasehold improvements  4 Equipment  5 , 144 , 798    4 , 814 , 039    330 , 759    4  | b    | Permanent endowment                          | %                          |            |                |                     |             |             |              |            |        |               |
| Are there endowment funds not in the possession of the organization that are held and administered for the organization by:  (i) Unrelated organizations  (ii) Related organizations  (iii) Re | С    |  | -^ -                       |            |                |                     |             |             |              |            |        |               |
| organization by:  (i) Unrelated organizations  (ii) Related organizations  (iii) Related organizations  |      | The percentages on lines 2a, 2b, and 2c sho  | uld equal 100%.            |            |                |                     |             |             |              |            |        |               |
| (i) Unrelated organizations (ii) Related organizations  b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?  4 Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (investment)  b Buildings  c Leasehold improvements  5 , 144 , 798    4 , 814 , 039    330 , 759    4  | 3a   | Are there endowment funds not in the posse   | ession of the organization | ation tha  | at are held ar | nd administe        | red for the | е           |              | Г.         |        |               |
| (ii) Related organizations  b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?  4 Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (investment)  b Buildings  c Leasehold improvements  d Equipment  13,845,985. 12,171,986. 1,673,999.  e Other  |      | · ·  |                            |            |                |                     |             |             |              |            | res    | No_           |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?  4 Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (investment)  b Buildings  c Leasehold improvements  d Equipment  e Other  |      |  |                            |            |                |                     |             |             |              |            | -      |               |
| 4 Describe in Part XIII the intended uses of the organization's endowment funds.  Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (investment)  b Buildings  c Leasehold improvements  d Equipment  e Other  |      |  |                            |            |                |                     |             |             |              |            | _      |               |
| Part VI Land, Buildings, and Equipment.  Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (other)  1a Land  b Buildings  c Leasehold improvements  d Equipment  e Other  | _    |  |                            |            |                |                     |             |             |              | 3b         |        |               |
| Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.  Description of property  (a) Cost or other basis (other)  (b) Cost or other basis (other)  (c) Accumulated depreciation  1a Land  b Buildings  c Leasehold improvements  4,814,039.  5,144,798.  4,814,039.  330,759.  4 Equipment  13,845,985.  12,171,986.  1,673,999.   |      |  |                            | wment      | funds.         |                     |             |             |              |            |        |               |
| Description of property  (a) Cost or other basis (investment)  (b) Cost or other basis (other)  (c) Accumulated depreciation  (d) Book value  (d) Book value  (e) Accumulated depreciation  (f) Accumulated depreciation  (g) Accumulated depreciation  (h) Cost or other basis (other)   | ı aı |  |                            | ) Dart I   | / line 11a S   | 600 Form 991        | Dart V I    | line 10     |              |            |        |               |
| basis (investment)         basis (other)         depreciation           1a Land         Buildings           c Leasehold improvements         5,144,798.         4,814,039.         330,759.           d Equipment         13,845,985.         12,171,986.         1,673,999.           e Other         Other   |      |  | T                          |            |                |                     | 1           |             | -d           | /d\ Dook   | valua  |               |
| 1a Land       b Buildings         c Leasehold improvements       5,144,798. 4,814,039. 330,759.         d Equipment       13,845,985. 12,171,986. 1,673,999.         e Other   |      | Description of property                      | , , , , , , , ,            |            | ` ',           |                     | 1 ' '       |             |              | (a) ROOK   | value  |               |
| b Buildings       5,144,798. 4,814,039. 330,759.         c Leasehold improvements       5,144,798. 1,814,039. 330,759.         d Equipment       13,845,985. 12,171,986. 1,673,999.         e Other       1,673,999.   |      | Land   |                            | . ioiitj   | Dasis          | (501101)            | uer.        |             |              |            |        | —             |
| c Leasehold improvements       5,144,798.       4,814,039.       330,759.         d Equipment       13,845,985.       12,171,986.       1,673,999.         e Other   |      |  |                            |            |                |                     |             |             |              |            |        | —             |
| d Equipment 13,845,985. 12,171,986. 1,673,999.   |      |  |                            |            | 5 14           | 4 798               | 4 8         | R14 0       | 39.          | 330        | 75     | 9.            |
| e Other  |      |  |                            |            |                |                     |             |             |              |            |        |               |
|  |      | ±  |                            |            |                | -,,,,,,,            | ,           | - , - , -   |              | _, , , , , | ,,,,   | <u>- · · </u> |
|  |      |  |                            | X colur    | nn (R) line 1  | 0c.)                |             |             |              | 2,004      | ,75    | 8.            |

Schedule D (Form 990) 2022

|  | IN BOARD OF II             | NTERNAL MEDICINE                         | 39-0866228 <sub>Page</sub> 3 |
|--|----------------------------|--|------------------------------|
| Part VII Investments - Other Securities.                             | F 000 D-+ N/ I'-           | 44b 0 - Faura 000 Bast V line 40         |                              |
| Complete if the organization answered "Yes"                          |                            |  |                              |
| (a) Description of security or category (including name of security) | (b) Book value             | (c) Method of valuation: Cost or         | end-or-year market value     |
| 1) Financial derivatives   |                            |  |                              |
| 2) Closely held equity interests                                     |                            |  |                              |
| 3) Other   |                            |  |                              |
| (A)  |                            |  |                              |
| (B)  |                            |  |                              |
| (C)  |                            |  |                              |
| (D)  |                            |  |                              |
| (E)  |                            |  |                              |
| (F)<br>(G)   |                            |  |                              |
| (H)  |                            |  |                              |
| Fotal. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)     |                            |  |                              |
| Part VIII Investments - Program Related.                             |                            |  |                              |
| Complete if the organization answered "Yes"                          | on Form 990. Part IV. lin  | e 11c. See Form 990. Part X. line 13.    |                              |
| (a) Description of investment  | (b) Book value             | (c) Method of valuation: Cost or         | end-of-vear market value     |
| (1)  | (-,                        | (0)                                      |                              |
| (1)  |                            |  |                              |
| (3)  |                            |  |                              |
| (4)  |                            |  |                              |
| (5)  |                            |  |                              |
| (6)  |                            |  |                              |
| (7)  |                            |  |                              |
| (8)  |                            |  |                              |
| (9)  |                            |  |                              |
| Fotal. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)     |                            |  |                              |
| Part IX Other Assets.  | •                          |  |                              |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, lin  | e 11d. See Form 990, Part X, line 15.    |                              |
| (a)  | Description                |  | (b) Book value               |
| (1) DUE FROM AFFILIATE   |                            |  | 51,875.                      |
| (2) RIGHT-OF-USE ASSETS - OPE  | RATING LEASES              |  | 46,872,090.                  |
| (3)  |                            |  |                              |
| (4)  |                            |  |                              |
| (5)  |                            |  |                              |
| (6)  |                            |  |                              |
| (7)  |                            |  |                              |
| (8)  |                            |  |                              |
| (9)  |                            |  |                              |
| Total. (Column (b) must equal Form 990, Part X, col. (B) lin         | e 15.)                     |  | 46,923,965.                  |
| Part X Other Liabilities.  |                            |  |                              |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, lin  | e 11e or 11f. See Form 990, Part X, line |                              |
| 1. (a) Description of liability                                      |                            |  | (b) Book value               |
| (1) Federal income taxes   |                            |  |                              |
| (2) DEFERRED COMPENSATION  |                            |  | 1,824,860.                   |
| (3) LEASE LIABILITIES - OPERA  | TING                       |  | <b>FA 222 1</b> = 1          |
| (4) LEASES   |                            |  | 58,980,674.                  |
| (5)  |                            |  |                              |
| (6)  |                            |  |                              |
| (7)  |                            |  |                              |
| (8)  |                            |  |                              |
| (9)  |                            |  |                              |
| <b>「otal.</b> (Column (b) must equal Form 990, Part X, col. (B) lin  | e 25.)                     |  | <u>.</u> 60,805,534.         |
| Liability for conservation to consiste and the Doct VIII accorded    |                            | to the examination's financial statemen  | to that raparts the          |
| 2. Liability for uncertain tax positions. In Part XIII, provide      | e the text of the foothole | to the organization's imancial statemen  | n provided in Part XIII X    |

232053 09-01-22

Schedule D (Form 990) 2022

|          | edule D (Form 990) 2022 THE AMERICAN BOARD OF                               | INTERNAL     | MEDICINE                      | 39-        | 0866228           | Page <b>4</b> |
|----------|---|--------------|-------------------------------|------------|-------------------|---------------|
| Pa       | rt XI Reconciliation of Revenue per Audited Financial Sta                   | atements Wit | h Revenue per Ro              | eturn.     |                   |               |
|          | Complete if the organization answered "Yes" on Form 990, Part IV, li        | ine 12a.     |                               |            |                   |               |
| 1        | Total revenue, gains, and other support per audited financial statements    |              |                               | 1          | 90,025            | <u>,168.</u>  |
| 2        | Amounts included on line 1 but not on Form 990, Part VIII, line 12:         |              |                               |            |                   |               |
| а        | Net unrealized gains (losses) on investments                                | 2a           | -12,727                       | <u>.</u>   |                   |               |
| b        | Donated services and use of facilities                                      | 2b           |                               |            |                   |               |
| С        | Recoveries of prior year grants   | 2c           |                               |            |                   |               |
| d        |   |              |                               |            |                   |               |
| е        | Add lines 2a through 2d   |              |                               | 2e         |                   | <u>,727.</u>  |
| 3        | Subtract line 2e from line 1  |              |                               | 3          | 90,037            | <u>,895.</u>  |
| 4        | Amounts included on Form 990, Part VIII, line 12, but not on line 1:        |              |                               |            |                   |               |
| а        | Investment expenses not included on Form 990, Part VIII, line 7b            | 4a           |                               |            |                   |               |
| b        | Other (Describe in Part XIII.)  | 4b           |                               |            |                   |               |
| С        | Add lines 4a and 4b   |              |                               | 4c         |                   | 0.            |
| 5        |   | 2.)          |                               | 5          | 90,037            | <u>,895.</u>  |
| Pa       | rt XII Reconciliation of Expenses per Audited Financial St                  |              | ith Expenses per              | Retur      | n.                |               |
|          | Complete if the organization answered "Yes" on Form 990, Part IV, li        | ine 12a.     |                               |            |                   |               |
| 1        | Total expenses and losses per audited financial statements                  |              |                               | 1          | 62,964            | <u>,601.</u>  |
| 2        | Amounts included on line 1 but not on Form 990, Part IX, line 25:           |              |                               |            |                   |               |
| а        | Donated services and use of facilities                                      | 2a           |                               | _          |                   |               |
| b        | Prior year adjustments  | 2b           |                               | _          |                   |               |
| С        | Other losses  | 2c           |                               | _          |                   |               |
| d        | Other (Describe in Part XIII.)  | 2d           |                               |            |                   |               |
| е        | Add lines 2a through 2d   |              |                               | 2e         |                   | 0.            |
| 3        | Subtract line 2e from line 1  |              |                               | 3          | 62,964            | <u>,601.</u>  |
| 4        | Amounts included on Form 990, Part IX, line 25, but not on line 1:          |              |                               |            |                   |               |
| а        | Investment expenses not included on Form 990, Part VIII, line 7b            | 4a           |                               | _          |                   |               |
| b        | Other (Describe in Part XIII.)  | 4b           |                               |            |                   | _             |
| С        | Add lines <b>4a</b> and <b>4b</b>   |              |                               | 4c         |                   | 0.            |
| 5        | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line | 18.)         |                               | 5          | 62,964            | <u>,601.</u>  |
|          | rt XIII Supplemental Information.   |              |                               |            |                   |               |
| <b>D</b> |   | 4 5 1 5 7 12 | Alle and Olevi Devil V. Paren | 4. D - + 1 | / Page 0. David V | /1            |

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

#### PART X, LINE 2:

THE INTERNAL REVENUE SERVICE HAS GRANTED THE ORGANIZATION, WHICH IS NOT A PRIVATE FOUNDATION, EXEMPTION FROM INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE. ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA REQUIRES THE ORGANIZATION TO EVALUATE TAX POSITIONS TAKEN BY THE ORGANIZATION AND RECOGNIZE A TAX LIABILITY IF THE ORGANIZATION HAS TAKEN ANY UNCERTAIN TAX POSITIONS THAT MORE LIKELY THAN NOT WOULD NOT BE SUSTAINED UPON EXAMINATION BY A TAX AUTHORITY. MANAGEMENT EVALUATED THE ORGANIZATION'S TAX POSITIONS AND CONCLUDED THAT THE ORGANIZATION HAD MAINTAINED ITS TAX-EXEMPT STATUS AND HAS TAKEN NO UNCERTAIN TAX POSITIONS THAT REQUIRE ADJUSTMENTS TO THE CONSOLIDATED FINANCIAL STATEMENTS. ACCORDINGLY, NO PROVISION FOR THE INCOME TAXES HAS

Schedule D (Form 990) 2022

232054 09-01-22

| Schedule | D (Form   | 990) 2022 | THE Information | AMERICAN    | BOARD    | OF  | INTERNAL | MEDICINE  | 39-0866228 | Page 5 |
|----------|-----------|-----------|-----------------|-------------|----------|-----|----------|-----------|------------|--------|
| Part X   | III   Sup | plementa  | l Information   | (continued) |          |     |          |           |            |        |
| BEEN     | MADE      | IN TH     | E ACCOMPA       | ANYING CON  | ISOLIDA' | TED | FINANCIA | L STATEME | NTS.       |        |
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|          |           |           |                 |             |          |     |          |           |            |        |

# SCHEDULE F (Form 990)

## Statement of Activities Outside the United States

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16. Attach to Form 990.

Open to Public

Department of the Treasury Internal Revenue Service

Go to www.irs.gov/Form990 for instructions and the latest information.

| name of the organization                      |                      |                         |   |                  | Employer identi                    | ncation number          |
|---|----------------------|-------------------------|---|------------------|------------------------------------|-------------------------|
| THE AMERICAN BO                               | ARD OF I             | NTERNAL 1               | MEDICINE  |                  | 39-086622                          | 28                      |
|   |                      |                         | side the United States. Comple  | ete if the organ | ization answered "                 | Yes" on                 |
| Form 990, Part IV                             | /, line 14b.         |                         |   |                  |                                    |                         |
|   |                      |                         | ds to substantiate the amount of its gra                                |                  |                                    |                         |
| the grantees' eligibility for                 | or the grants or a   | issistance, and t       | he selection criteria used to award the                                 | grants or assis  | tance?                             | Yes No                  |
| O Far grantmakara Dooo                        | riba in Dart V tha   | organization's          | are and transfer manifesting the transfit                               | aranta and att   | har agaistanaa ayt                 | side the                |
| <b>2 For grantmakers.</b> Desc United States. | ribe ili Fart v trie | organization s p        | procedures for monitoring the use of its                                | s grants and ou  | ner assistance outs                | side trie               |
|   | ne following Part    | I. line 3 table ca      | n be duplicated if additional space is n                                | eeded.)          |                                    |                         |
| (a) Region                                    | (b) Number of        | (c) Number of           | (d) Activities conducted in the region                                  | · ·              | vity listed in (d)                 | (f) Total               |
|   | offices              | employees, agents, and  | (by type) (such as, fundraising, pro-                                   |                  | gram service,                      | expenditures<br>for and |
|   | in the region        | independent contractors | gram services, investments, grants to recipients located in the region) |                  | specific type<br>(s) in the region | investments             |
|   |                      | in the region           | recipients located in the region,                                       | Of 3CI VICC      |                                    | in the region           |
|   |                      |                         | A HENDOD DROHIDING GODWINDS   |                  |                                    |                         |
| EAST ASIA AND THE                             |                      |                         | A VENDOR PROVIDING SOFTWARE SERVICES IS LOCATED IN THIS                 |                  |                                    |                         |
| PACIFIC                                       | 0                    |                         |   | N/A              |                                    | 401,780.                |
|   |                      |                         |   | 11/ 11           |                                    | 101,700.                |
|   |                      |                         |   |                  |                                    |                         |
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| 3 a Subtotal                                  | 0                    | 1                       |   |                  |                                    | 401,780.                |
| <b>b</b> Total from continuation              |                      |                         |   |                  |                                    |                         |
| sheets to Part I                              | 0                    | 0                       |   |                  |                                    | 0.                      |
| c Totals (add lines 3a                        | _                    | _                       |   |                  |                                    | 401 700                 |
| and 3b)                                       | 0                    | 1                       |   |                  |                                    | 401,780.                |

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

Schedule F (Form 990) 2022

Grants and Other Assistance to Organizations or Entities Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

| 1<br>(a) Name of organization | <b>(b)</b> IRS code section and EIN (if applicable) | (c) Region               | (d) Purpose of grant   | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of noncash assistance | (h) Description of noncash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|-------------------------------|---|--------------------------|--|--------------------------|---------------------------------|----------------------------------|---------------------------------------|---|
|                               |   |                          |  |                          |                                 |                                  |                                       |   |
|                               |   |                          |  |                          |                                 |                                  |                                       |   |
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|                               |   |                          |  |                          |                                 |                                  |                                       |   |
|                               | inization by the IRS, o                             | or for which the grantee | recognized as charities by the or counsel has provided a sec |                          |                                 | <b>\</b>                         |                                       |   |

Schedule F (Form 990) 2022

THE AMERICAN BOARD OF INTERNAL MEDICINE

39-0866228

Page 3

Part III Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed. (h) Method of valuation (book, FMV, appraisal, other) (c) Number of (d) Amount of (e) Manner of (f) Amount of (g) Description of (a) Type of grant or assistance (b) Region recipients cash grant cash disbursement noncash noncash assistance assistance

|      | ile F (Form 990) 2022 THE AMERICAN BOARD OF INTERNAL MEDICINE   | 39-0866228 | Page 4 |
|------|---|------------|--------|
| Part | IV   Foreign Forms  |            |        |
| 1    | Was the organization a U.S. transferor of property to a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)  | Yes        | X No   |
| 2    | Did the organization have an interest in a foreign trust during the tax year? If "Yes," the organization may  |            |        |
|      | be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)  | Yes        | X No   |
| 3    | Did the organization have an ownership interest in a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see Instructions for Form 5471)  | Yes        | X No   |
| 4    | Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see Instructions for Form 8621) | Yes        | X No   |
| 5    | Did the organization have an ownership interest in a foreign partnership during the tax year? If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see Instructions for Form 8865)  | Yes        | X No   |
| 6    | Did the organization have any operations in or related to any boycotting countries during the tax year? If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990)  | Yes        | X No   |

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Schedule F (Form 990) 2022

| Schedule F | (Form 990) 2022   | THE        | AMERICAN             | BOARD O          | F INTERNAL              | MEDICINE               | 39-0866228                     | Page 5   |
|------------|-------------------|------------|----------------------|------------------|-------------------------|------------------------|--------------------------------|----------|
| Part V     | Supplementa       |            |                      |                  |                         |                        |                                | <u> </u> |
|            |                   |            |                      | ne 2 (monitorino | of funds): Part I. lin  | e 3. column (f) (accou | unting method; amounts of      |          |
|            |                   |            |                      |                  |                         |                        | hod); and Part III, column (c) |          |
|            |                   |            |                      |                  |                         |                        | ormation. See instructions.    |          |
|            | (estimated number | er or reci | pierits), as applica | bie. Also compi  | ete triis part to provi | de any additional init | ormation. See instructions.    |          |
|            |                   |            |                      |                  |                         |                        |                                |          |
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|            |                   |            |                      | <u> </u>         |                         |                        |                                |          |
|            |                   |            |                      |                  |                         |                        |                                |          |
|            |                   |            |                      |                  |                         |                        |                                |          |

Schedule F (Form 990) 2022

## SCHEDULE J (Form 990)

Department of the Treasury

**Compensation Information** 

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

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

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Internal Revenue Service Name of the organization

THE AMERICAN BOARD OF INTERNAL MEDICINE

Employer identification number 39-0866228

| Pa | art I Questions Regarding Compensation   |    |     |    |  |  |  |
|----|--|----|-----|----|--|--|--|
|    |  |    | Yes | No |  |  |  |
| 1a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990,   |    |     |    |  |  |  |
|    | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.   |    |     |    |  |  |  |
|    | First-class or charter travel Housing allowance or residence for personal use  |    |     |    |  |  |  |
|    | Travel for companions Payments for business use of personal residence  |    |     |    |  |  |  |
|    | Tax indemnification and gross-up payments  Health or social club dues or initiation fees   |    |     |    |  |  |  |
|    | Discretionary spending account  Personal services (such as maid, chauffeur, chef)  |    |     |    |  |  |  |
|    |  |    |     |    |  |  |  |
| b  | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or  |    |     |    |  |  |  |
|    | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain   | 1b |     |    |  |  |  |
| 2  | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors,   |    |     |    |  |  |  |
|    | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?  | 2  |     |    |  |  |  |
|    |  |    |     |    |  |  |  |
| 3  | Indicate which, if any, of the following the organization used to establish the compensation of the organization's   |    |     |    |  |  |  |
|    | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to   |    |     |    |  |  |  |
|    | establish compensation of the CEO/Executive Director, but explain in Part III.   |    |     |    |  |  |  |
|    | X Compensation committee X Written employment contract   |    |     |    |  |  |  |
|    | X Independent compensation consultant X Compensation survey or study   |    |     |    |  |  |  |
|    | X Form 990 of other organizations X Approval by the board or compensation committee  |    |     |    |  |  |  |
| 1  | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing   |    |     |    |  |  |  |
| 4  | organization or a related organization:  |    |     |    |  |  |  |
| a  | Description of the second of t | 4a |     | х  |  |  |  |
|    | Participate in or receive payment from a supplemental nonqualified retirement plan?  | 4b |     | X  |  |  |  |
|    |  | 4c |     | X  |  |  |  |
| _  | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.  |    |     |    |  |  |  |
|    |  |    |     |    |  |  |  |
|    | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.   |    |     |    |  |  |  |
| 5  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation  |    |     |    |  |  |  |
|    | contingent on the revenues of:   |    |     |    |  |  |  |
| а  | The organization?  | 5a |     | X  |  |  |  |
| b  | Any related organization?  | 5b |     | X  |  |  |  |
|    | If "Yes" on line 5a or 5b, describe in Part III.   |    |     |    |  |  |  |
| 6  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation  |    |     |    |  |  |  |
|    | contingent on the net earnings of:   |    |     |    |  |  |  |
| а  | The organization?  | 6a |     | X  |  |  |  |
|    | Any related organization?  | 6b |     | Х  |  |  |  |
|    | If "Yes" on line 6a or 6b, describe in Part III.   |    |     |    |  |  |  |
| 7  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments   |    |     |    |  |  |  |
|    | not described on lines 5 and 6? If "Yes," describe in Part III   | 7  | X   |    |  |  |  |
| 8  | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the  |    |     |    |  |  |  |
|    | initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III  | 8  |     | X  |  |  |  |
| 9  | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in   |    |     |    |  |  |  |
|    | Regulations section 53.4958-6(c)?  | 9  |     |    |  |  |  |

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

Schedule J (Form 990) 2022

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| (A) Name and Title                 |       | <b>B)</b> Breakdown of W | /-2 and/or 1099-MISC compensation   | and/or 1099-NEC                     | (C) Retirement and other deferred | (D) Nontaxable benefits | (E) Total of columns<br>(B)(i)-(D) | (F) Compensation in column (B)            |  |
|------------------------------------|-------|--------------------------|-------------------------------------|-------------------------------------|-----------------------------------|-------------------------|------------------------------------|---|--|
|                                    |       | (i) Base<br>compensation | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | compensation                      |                         |                                    | reported as deferred<br>on prior Form 990 |  |
| (1) RICHARD J. BARON               | i)    | 600,722.                 | 148,903.                            | 145,725.                            | 194,913.                          | 18,187.                 | 1,108,450.                         | 126,714.                                  |  |
|                                    | ii) — | 150,181.                 | 37,226.                             | 36,431.                             | 48,729.                           | 4,546.                  | 277,113.                           | 31,679.                                   |  |
| (2) RICHARD BATTAGLIA              | i)    | 362,587.                 | 78,231.                             | 18,054.                             | 48,656.                           | 51,380.                 | 558,908.                           | 0.  |  |
| CHIEF MEDICAL OFFICER              | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (3) JUDITH CASSEL                  | i)    | 332,014.                 | 78,136.                             | 18,304.                             | 48,656.                           | 39,704.                 | 516,814.                           | 0.  |  |
| CHIEF OF STAFF                     | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (4) FURMAN MCDONALD                | i) _  | 354,443.                 | 81,180.                             | 20,454.                             | 48,656.                           | 6,134.                  | 510,867.                           | 0.  |  |
| SVP, ACADEMIC & MEDICAL AFFAIRS    | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (5) REBECCA LIPNER                 | i) _  | 340,205.                 | 69,379.                             | 13,285.                             | 48,656.                           | 11,676.                 | 483,201.                           | 0.  |  |
| SVP, ASSESSMENT & RESEARCH         | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (6) VINCENT MANDES                 | i) _  | 277,523.                 | 76,500.                             | 36,721.                             | 43,790.                           | 0.                      | 434,534.                           | 0.  |  |
| SENIOR VICE PRESIDENT/CFO          | ii)   | 30,836.                  | 8,500.                              | 4,081.                              | 4,866.                            | 0.                      | 48,283.                            | 0.  |  |
| (7) PAMELA BROWNER-WHITE           | i)    | 240,244.                 | 55,289.                             | 33,542.                             | 42,331.                           | 27,610.                 | 399,016.                           | 0.  |  |
| SVP, COMMUNICATIONS (i             | ii)   | 35,898.                  | 8,262.                              | 5,012.                              | 6,325.                            | 4,126.                  | 59,623.                            | 0.  |  |
| (8) JEFFREY MILLER                 | i)    | 237,949.                 | 70,469.                             | 41,100.                             | 46,181.                           | 38,826.                 | 434,525.                           | 0.  |  |
| VP, INFORMATION TECHNOLOGY         | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (9) LORNA LYNN                     | i)    | 272,093.                 | 40,375.                             | 2,352.                              | 42,801.                           | 2,640.                  | 360,261.                           | 0.  |  |
| VP, MEDICAL EDUCATION RESEARCH     | ii)   | 5,553.                   | 824.                                | 48.                                 | 873.                              | 54.                     | 7,352.                             | 0.  |  |
| (10) BRADLEY BROSSMAN              | i)    | 199,591.                 | 32,288.                             | 15,556.                             | 32,415.                           | 27,820.                 | 307,670.                           | 0.  |  |
| VP, PSYCHOMETRICS                  | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (11) ROBERT KENDRICK               | i)    | 173,748.                 | 28,761.                             | 9,600.                              | 27,960.                           | 37,109.                 | 277,178.                           | 0.  |  |
| VP, FINANCE OPERATIONS (i          | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (12) MICHAEL YAGLEY                | i) _  | 183,637.                 | 10,500.                             | 14,454.                             | 28,733.                           | 34,907.                 | 272,231.                           | 0.  |  |
| SR DIR, APPLICATION DEVELOPMENT (i | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (13) BERNADETTE HORVAT             | i)    | 197,813.                 | 30,750.                             | 8,850.                              | 30,472.                           | 3,984.                  | 271,869.                           | 0.  |  |
| VP, TALENT AND CULTURE             | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (14) JEREMY DUGOSH                 | i) _  | 173,566.                 | 19,722.                             | 29,400.                             | 28,998.                           | 0.                      | 251,686.                           | 0.  |  |
| VP, TEST DEVELOPMENT (i            | ii)   | 0.                       | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (                                  | i)    |                          | _                                   |                                     |                                   |                         |                                    |   |  |
| (i                                 | ii)   |                          |                                     |                                     |                                   |                         |                                    |   |  |
| (                                  | i)    |                          |                                     |                                     |                                   |                         |                                    |   |  |
| (i                                 | ii)   |                          |                                     |                                     |                                   |                         |                                    |   |  |

| Schedule J (Form 990) 2022 THE AMERICAN BOARD OF INTERNAL MEDICINE   | 39-0866228                                | Page <b>3</b> |
|--|---|---------------|
| Part III Supplemental Information  |   |               |
| Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete | ete this part for any additional informat | ion.          |
|  |   |               |
| PART I, LINE 7:  |   |               |
| ABIM HAS A BONUS POOL FOR TOP EXECUTIVES. THE BOARD EVALUATES THE  |   |               |
| PERFORMANCE OF EACH EXECUTIVE BASED ON PRE-ESTABLISHED OBJECTIVES FOR A  |   |               |
| GIVEN YEAR AND THEN DETERMINES WHETHER A BONUS IS APPROPRIATE.   |   |               |
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SCHEDULE O (Form 990)

Department of the Treasury

Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

Attach to Form 990 or Form 990-EZ.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

2022 Open to Public Inspection

OMB No. 1545-0047

Name of the organization

THE AMERICAN BOARD OF INTERNAL MEDICINE

Employer identification number 39-0866228

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

THE AMERICAN BOARD OF INTERNAL MEDICINE (ABIM) SEEKS TO ENHANCE THE

QUALITY OF HEALTH CARE BY CERTIFYING INTERNISTS AND SUBSPECIALISTS WHO

DEMONSTRATE THE KNOWLEDGE, SKILLS AND ATTITUDES ESSENTIAL FOR EXCELLENT

PATIENT CARE.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ABIM SEEKS TO ENHANCE THE QUALITY OF HEALTH CARE BY CERTIFYING

INTERNISTS AND SUBSPECIALISTS WHO DEMONSTRATE THE KNOWLEDGE, SKILLS AND

ATTITUDES ESSENTIAL FOR EXCELLENT PATIENT CARE.

SINCE ITS FOUNDING IN 1936 TO ANSWER A PUBLIC CALL TO ESTABLISH MORE

UNIFORM STANDARDS FOR PHYSICIANS, CERTIFICATION BY ABIM HAS STOOD FOR

THE HIGHEST STANDARD IN INTERNAL MEDICINE AND ITS 21 SUBSPECIALTIES.

CERTIFICATION HAS MEANT THAT INTERNISTS HAVE DEMONSTRATED - TO THEIR

PEERS AND TO THE PUBLIC - THAT THEY HAVE THE CLINICAL JUDGMENT, SKILLS

AND ATTITUDES ESSENTIAL FOR THE DELIVERY OF EXCELLENT PATIENT CARE.

ABIM IS NOT A MEMBERSHIP SOCIETY, BUT A PHYSICIAN-LED NON-PROFIT,

INDEPENDENT EVALUATION ORGANIZATION. RESEARCH SUGGESTS BOARD

CERTIFICATION IS ASSOCIATED WITH BETTER CARE. OUR ACCOUNTABILITY IS

BOTH TO THE PROFESSION OF MEDICINE AND TO THE PUBLIC.

ABIM'S GOVERNANCE STRUCTURE CONSISTS OF MORE THAN 330 MEMBERS ON MORE

THAN 50 BOARDS AND COMMITTEES AND INCLUDES PHYSICIANS, ALLIED

PROFESSIONALS AND PUBLIC MEMBERS. ABIM OFFERS CERTIFICATION IN 22

DISCIPLINES - REPRESENTING THE BREADTH AND DEPTH OF INTERNAL MEDICINE.

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

Schedule O (Form 990) 2022

Schedule O (Form 990) 2022 Page 2 Name of the organization **Employer identification number** 39-0866228 THE AMERICAN BOARD OF INTERNAL MEDICINE FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS: IN ORDER TO BE CERTIFIED, A PHYSICIAN MUST: COMPLETE THE REQUISITE PRE-DOCTORAL MEDICAL EDUCATION MEET SPECIFIC TRAINING REQUIREMENTS MEET LICENSURE REQUIREMENTS AND PROCEDURAL REQUIREMENTS PASS A CERTIFICATION EXAMINATION ABIM ADMINISTERS ITS CERTIFICATION PROCESS BY: (1) ESTABLISHING REQUIREMENTS FOR TRAINING AND SELF-EVALUATION; (2) ASSESSING THE PROFESSIONAL CREDENTIALS OF CANDIDATES; (3) OBTAINING SUBSTANTIATION BY APPROPRIATE AUTHORITIES OF THE CLINICAL COMPETENCE AND PROFESSIONAL STANDING OF CANDIDATES; AND (4) DEVELOPING AND CONDUCTING EXAMINATIONS AND OTHER ASSESSMENTS. INITIAL CERTIFICATION BY ABIM SIGNIFIES A PHYSICIAN IS READY TO PRACTICE IN INTERNAL MEDICINE OR ONE OF ITS SUBSPECIALTIES. FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS: DIPLOMATES PARTICIPATING IN ABIM'S MOC PROGRAM ARE REQUIRED TO TAKE AND PASS AN ASSESSMENT EVERY 10 YEARS TO REMAIN CERTIFIED. THEY CAN DO THIS BY PASSING A POINT-IN-TIME ASSESSMENT CALLED THE TRADITIONAL, 10-YEAR MOC EXAM, OR ACHIEVING A PASSING SCORE AT THE CONCLUSION OF THEIR 5-YEAR LKA CYCLE. DIPLOMATES HOLDING CERTIFICATION IN CARDIOLOGY MAY ALSO BE ABLE TO SATISFY THIS REQUIREMENT BY ACHIEVING A PASSING SCORE IN THE COLLABORATIVE MAINTENANCE PATHWAY, AN ASSESSMENT PRODUCT JOINTLY CREATED AND ADMINISTERED BY ABIM AND THE AMERICAN COLLEGE OF CARDIOLOGY. MOST DIPLOMATES CERTIFIED PRIOR TO 1990 ARE STRONGLY URGED Schedule O (Form 990) 2022

Schedule O (Form 990) 2022 Page 2 **Employer identification number** Name of the organization 39-0866228 THE AMERICAN BOARD OF INTERNAL MEDICINE TO PARTICIPATE IN MOC BUT ARE NOT REQUIRED TO DO SO TO REMAIN CERTIFIED. FOR ALL DIPLOMATES, IN ADDITION TO REPORTING BOARD CERTIFICATION, ABIM WILL REPORT IF THEY ARE PARTICIPATING IN THE MOC PROGRAM (I.E., ENGAGING IN MOC ACTIVITIES FREQUENTLY). PARTICIPATION IN MOC AND CONTINUED CERTIFICATION BY ABIM SIGNIFIES A PHYSICIAN IS STAYING CURRENT IN HIS OR HER DISCIPLINE. FORM 990, PART VI, SECTION A, LINE 1A: ABIM DOES NOT DELEGATE BROAD AUTHORITY TO ANY COMMITTEE. FORM 990, PART VI, SECTION B, LINE 11B: THE FORM 990 IS PREPARED BY AN INDEPENDENT ACCOUNTING FIRM. THE FINANCE DEPARTMENT PROVIDES ALL INFORMATION AND REVIEWS THE FORM 990 PRIOR TO BOARD REVIEW. THE FORM 990 IS THEN MADE AVAILABLE TO THE ENTIRE GOVERNING BODY, VIA EMAIL, FOR COMMENTS AND QUESTIONS. ONCE ALL COMMENTS AND QUESTIONS HAVE BEEN ADDRESSED, THE FORM 990 IS APPROVED. THE CFO SIGNS THE FORM 990 AND COMMUNICATES TO THE BOARD OF DIRECTORS THAT THE FORM 990 HAS BEEN FILED. FORM 990, PART VI, SECTION B, LINE 12C: A FORMAL, WRITTEN CONFLICT OF INTEREST POLICY HAS BEEN DEVELOPED AND IS REVIEWED PERIODICALLY BY THE CONFLICT OF INTEREST COMMITTEE, A SUBCOMMITTEE OF THE GOVERNANCE COMMITTEE OF THE BOARD OF DIRECTORS. IT IS POSTED AND EASY TO LOCATE ON ABIM'S WEBSITE. ALL GOVERNANCE MEMBERS MUST ABIDE BY BOTH A FINANCIAL AND ACADEMIC CONFLICT OF INTEREST POLICY. ABIM STAFF ARE GOVERNED BY A CONFLICT OF INTEREST POLICY IN THE EMPLOYEE HANDBOOK AND EXECUTIVE STAFF ARE SUBJECT TO ANNUAL DISCLOSURE OF ANY POTENTIAL

CONFLICTS. ALL GOVERNANCE AND EXECUTIVE STAFF DISCLOSURES OF RELEVANT

Schedule O (Form 990) 2022 Page **2** 

Name of the organization

THE AMERICAN BOARD OF INTERNAL MEDICINE

Employer identification number
39-0866228

RELATIONSHIPS ARE AVAILABLE ON ABIM'S WEBSITE.

## FINANCIAL CONFLICT OF INTEREST

INDIVIDUALS WHO ARE APPOINTED TO SERVE ON ABIM BOARDS OR COMMITTEES ARE

EXPECTED TO HAVE ABIM'S MISSION AS THEIR PRIMARY INTEREST WHEN CONTRIBUTING

TO ABIM'S WORK. A REAL OR PERCEIVED CONFLICT OF INTEREST MAY ARISE WHEN,

DUE TO ANOTHER INTEREST THAT MAY COMPETE WITH THOSE OF ABIM, AN INDIVIDUAL

HAS THE OPPORTUNITY TO INFLUENCE ABIM WORK IN WAYS THAT COULD LEAD TO, OR

APPEAR TO LEAD TO, PERSONAL OR INSTITUTIONAL GAIN, OR ADVANTAGE FOR ANOTHER

ORGANIZATION.

THE ABIM CONFLICT OF INTEREST POLICY IS INTENDED TO PROVIDE GUIDELINES FOR

IDENTIFYING AND MANAGING CONFLICTS THAT ARISE FROM COMPETING INTERESTS. IT

IS INTENDED TO MAINTAIN THE INTEGRITY OF ABIM'S DECISION-MAKING PROCESSES

AND, THEREBY, MAINTAIN THE CONFIDENCE OF THE PROFESSION AND THE PUBLIC IN

ABIM'S STANDARDS AND JUDGMENTS.

THE POLICY APPLIES TO MEMBERS OF THE BOARD OF DIRECTORS, THE ABIM COUNCIL,

SPECIALTY BOARDS AND ADVISORY COMMITTEES, ASSESSMENT DEVELOPMENT GROUPS

(INCLUDING APPROVAL COMMITTEES AND ITEM-WRITING TASK FORCES), STANDARD

SETTING PANELS, AND ANY OTHER STANDING AND AD HOC COMMITTEES OR TASK FORCES

OF ABIM THAT DEVELOP ABIM POLICIES OR PRODUCTS. THOSE IN SERVICE TO ABIM ON

THESE OR SUBSEQUENTLY CREATED ENTITIES ARE REFERRED TO COLLECTIVELY AS

"MEMBERS." THE POLICY APPLIES TO PUBLIC AND INTER-PROFESSIONAL MEMBERS AS

WELL AS TO PHYSICIAN MEMBERS. BECAUSE THE WORK OF MEMBERS IN DIFFERENT

GROUPS VARIES CONSIDERABLY IN FOCUS, DIFFERENT TYPES OF MANAGEMENT OF

RELATIONSHIPS MAY BE INDICATED FOR SPECIFIC GROUPS. THE COMPLETE POLICY CAN

BE FOUND AT

Schedule O (Form 990) 2022 Page 2

Name of the organization

THE AMERICAN BOARD OF INTERNAL MEDICINE

Employer identification number
39-0866228

HTTP://WWW.ABIM.ORG/ABOUT/GOVERNANCE/BOARD-POLICIES/FINANCIAL-CONFLICT-OF-I
TEREST.ASPX.

## ACADEMIC CONFLICT OF INTEREST

ABIM RECOGNIZES THAT INDIVIDUALS WHO SERVE ON ITS BOARD OF DIRECTORS,

COUNCIL, SPECIALTY AND SUBSPECIALTY BOARDS, AND EXAM WRITING AND MEDICAL

KNOWLEDGE SELF-ASSESSMENT PRODUCT COMMITTEES ARE ASKED TO SERVE THE MEDICAL

COMMUNITY IN MANY WAYS. INDEED, IN MOST CIRCUMSTANCES, ABIM IS WELL-SERVED

BY THE DIVERSE ACADEMIC ACTIVITIES OF ITS MEMBERS. MEMBERS MUST RECOGNIZE,

HOWEVER, THAT SOME EDUCATIONAL ACTIVITIES CAN CREATE A REAL, POTENTIAL OR

PERCEIVED CONFLICT OF INTEREST RELATING TO KNOWLEDGE OF QUESTIONS ON ABIM

ASSESSMENTS. MEMBERS MUST FOLLOW THE GUIDELINES IN THE POLICY REGARDING

EDUCATIONAL ACTIVITIES DURING ABIM SERVICE AND FOR A PERIOD OF TWO YEARS

THEREAFTER. IT IS THE RESPONSIBILITY OF EACH MEMBER TO REPORT POTENTIAL AND

ACTUAL SOURCES OF PERSONAL ACADEMIC CONFLICTS OF INTEREST AND TO COMPLY

WITH THE POLICIES AND GUIDELINES DESCRIBED IN THE POLICY.

PROTECTING THE INTEGRITY OF ABIM EXAMINATIONS AND OTHER ASSESSMENTS IS

ABSOLUTELY VITAL TO THE SUCCESSFUL WORK OF ABIM. INVOLVEMENT OF THOSE WHO

CONTRIBUTE TO ABIM EXAMINATIONS AND ASSESSMENTS IN EDUCATIONAL PROGRAMS

COULD CREATE THE PERCEPTION OF UNFAIR ADVANTAGE TO PROGRAM PARTICIPANTS.

SPECIFICALLY, THOSE WHO DEVELOP ABIM EXAMINATIONS OR MEDICAL KNOWLEDGE

SELF- ASSESSMENT PRODUCTS OR WHO INFLUENCE ABIM POLICIES MUST NOT

PARTICIPATE IN EDUCATIONAL ACTIVITIES THAT ARE ADVERTISED AS PREPARATION

FOR ABIM SECURE EXAMS IN THEIR SPECIALTY OR ANY OTHER ABIM AREA OF

CERTIFICATION. ALTHOUGH MEMBERS OF SPECIFIC ASSESSMENT DEVELOPMENT GROUPS

GENERALLY DO NOT HAVE ANY DIRECT KNOWLEDGE ABOUT THE CONTENT OF OTHER

EXAMINATIONS OFFERED BY ABIM, AND SOME MEMBERS OF THE BOARD OF DIRECTORS,

Schedule O (Form 990) 2022

Schedule O (Form 990) 2022 Page 2

THE AMERICAN BOARD OF INTERNAL MEDICINE

THE COUNCIL AND THE SPECIALTY BOARDS/ADVISORY COMMITTEES DO NOT WORK

DIRECTLY ON ANY EXAMINATIONS, THE BROADER PHYSICIAN AND HEALTH CARE

COMMUNITIES DO NOT MAKE A DISTINCTION BETWEEN THESE VARIED TYPES OF

SERVICE TO ABIM. THEREFORE, THE FOLLOWING GUIDELINES APPLY TO ALL MEMBERS.

IN ADDITION, ABIM STAFF IS SUBJECT TO THE CONFLICT OF INTEREST POLICIES SET

FORTH IN THE ABIM STAFF CODE OF ETHICS AND BUSINESS CONDUCT. THE PRESIDENT

AND CEO, AS A MEMBER OF THE BOARD OF DIRECTORS, IS SUBJECT TO THE

GUIDELINES CONTAINED IN THIS POLICY AS WELL AS TO THE STAFF CODE OF ETHICS

AND BUSINESS CONDUCT.

IF UNCERTAIN ABOUT THESE GUIDELINES, INDIVIDUALS ARE URGED TO SEEK THE

ADVICE OF THE ABIM CONFLICT OF INTEREST STAFF, THE CONFLICT OF INTEREST

SUBCOMMITTEE OR THE CHAIR OF THE BOARD. QUESTIONS ABOUT ACTIVITIES NOT

CLEARLY COVERED BY THESE GUIDELINES WILL BE TAKEN TO THE CONFLICT OF

INTEREST SUBCOMMITTEE CHAIR, WHO MAY CHOOSE TO CONVENE THE FULL CONFLICT OF

INTEREST SUBCOMMITTEE; MEMBERS MAY ALSO REQUEST A FULL CONFLICT OF INTEREST

SUBCOMMITTEE REVIEW.

DECISIONS OF THE CONFLICT OF INTEREST SUBCOMMITTEE CONCERNING PERMITTED AND PROHIBITED ACTIVITIES ARE TO BE CONSIDERED FINAL, AND THE CONFLICT OF INTEREST SUBCOMMITTEE MAY RECOMMEND TO THE GOVERNANCE COMMITTEE SANCTIONS

FOR MEMBERS FOUND TO BE IN VIOLATION OF THE ACADEMIC CONFLICT OF INTEREST POLICY OR A DECISION OF THE CONFLICT OF INTEREST SUBCOMMITTEE, UP TO AND INCLUDING REMOVAL FROM BOARD SERVICE OR REVOCATION OF CERTIFICATION.

THE POLICY CAN BE FOUND AT

HTTP://WWW.ABIM.ORG/ABOUT/GOVERNANCE/BOARD-POLICIES/ACADEMIC-CONFLICT-OF-IN

EREST.ASPX.

Schedule O (Form 990) 2022

Schedule O (Form 990) 2022 Page 2 Name of the organization **Employer identification number** 39-0866228 THE AMERICAN BOARD OF INTERNAL MEDICINE FORM 990, PART VI, SECTION B, LINE 15: ABIM ENGAGES AN EXTERNAL COMPENSATION VENDOR TO CONDUCT AN ORGANIZATION-WIDE COMPENSATION REVIEW ROUGHLY EVERY THREE YEARS TO ASSURE COMPETITIVE BASE AND TOTAL COMPENSATION FOR ALL EMPLOYEES UP THROUGH AND INCLUDING VICE PRESIDENTS. EACH CYCLE, THE VENDOR: REVIEWS ALL EXISTING JOB DESCRIPTIONS/DOCUMENTATION; SPEAKS WITH KEY MANAGERS IN EACH FUNCTIONAL AREA; RESEARCHES AND EXTRACTS PAY SURVEY DATA FOR SELECTED BENCHMARK JOB TYPES; AND, ANALYZES SEVERAL PAY PRACTICE DATA SOURCES INCLUDING: VIEW OF COMMERCIAL SURVEY REPORTS (ECONOMIC RESEARCH INSTITUTE, SALARY.COM, PRM CONSULTING); REVIEW OF 990S FOR NON-PROFIT ORGANIZATIONS WITH SIMILAR SIZES IN HEALTH CARE; AND ASSESSMENT OF THE PAY PRACTICES OF OTHER NON-PROFIT AND FOR-PROFIT CLIENTS IN THE PHILADELPHIA LABOR MARKET. ABIM MAINTAINS SALARIES IN LINE WITH DESIGNATED RANGES AND COMPETITIVE PAY PRACTICES. IN ADDITION, COMPENSATION OF OUR CEO IS REVIEWED EACH YEAR BY THE EXECUTIVE COMPENSATION COMMITTEE (ECC), AND THE ECC'S RECOMMENDATION ON CEO COMPENSATION NEEDS TO BE APPROVED BY THE BOARD OF DIRECTORS. OTHER EXECUTIVE-LEVEL STAFF IS SET AFTER RECOMMENDATION BY THE CEO AND THEN REVIEW AND APPROVAL BY THE EXECUTIVE COMPENSATION COMMITTEE. THE ECC DIRECTLY ENGAGES AN INDEPENDENT CONSULTANT TO PROVIDE DATA ON SALARIES FOR

Schedule O (Form 990) 2022

COMPARABLE EXECUTIVE POSITIONS IN COMPARABLE ORGANIZATIONS, UPDATED EVERY

THREE YEARS, AND THIS COMPARATIVE DATA IS USED TO SET, REVIEW AND APPROVE

Schedule O (Form 990) 2022 Page 2 **Employer identification number** Name of the organization THE AMERICAN BOARD OF INTERNAL MEDICINE 39-0866228 ALL EXECUTIVE SALARIES. THE EXECUTIVE COMPENSATION COMMITTEE REPORTS EXECUTIVE COMPENSATION ANNUALLY TO THE FULL BOARD OF DIRECTORS. THE REVIEW AND APPROVAL OF CEO AND EXECUTIVE-LEVEL STAFF COMPENSATION IS DOCUMENTED IN THE MINUTES OF THE ECC. FORM 990, PART VI, SECTION C, LINE 18: FORM 1023 WAS NOT REQUIRED AT THE TIME OF INCORPORATION (1936). FORM 990, PART VI, SECTION C, LINE 19: THE GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE AVAILABLE UPON REQUEST. FORM 990, PART VII: THE COMPENSATION REPORTED ON FORM 990, PART VII FOR THE FOLLOWING INDIVIDUALS WAS PAID DIRECTLY TO THEIR EMPLOYERS AS FOLLOWS: SAFWAN BADR - EDUMED, LLC - \$14,000 THE COMPENSATION REPORTED ON FORM 990, PART VII FOR THE FOLLOWING INDIVIDUALS INCLUDED COMPENSATION FOR ABIM BOARD SERVICE AS WELL AS OTHER SERVICES; COMPENSATION AND SERVICES ARE BROKEN DOWN AS FOLLOWS: ROBERT D. SIEGEL - OF THE \$20,750 TOTAL COMPENSATION REPORTED FOR ROBERT D. SIEGEL, \$2,000 WAS FOR SERVING ON THE ABIM MEDICAL ONCOLOGY SPECIALTY BOARD, \$4,750 WAS FOR SERVING ON THE ABIM COUNCIL, AND THE REMAINING \$14,000 WAS FOR SERVING ON THE ABIM BOARD OF DIRECTORS. ERICA JOHNSON, MD - OF THE \$20,500 TOTAL COMPENSATION REPORTED FOR ERICA JOHNSON, MD, \$4,000 WAS FOR SERVING ON THE ABIM INFECTIOUS DISEASE BOARD, \$9,500 WAS FOR SERVING ON THE ABIM COUNCIL, AND THE Schedule O (Form 990) 2022

| Name of the organization  THE AMERICAN BOARD OF INTERNAL MEDICINE | Employer identification number 39-0866228 |
|---|---|
| REMAINING \$7,000 WAS FOR SERVING ON THE ABIM BOARD OF DIRE       | CTORS.                                    |
|   |   |
| FORM 990, PART IX, LINE 11G, OTHER FEES:  CONSULTANTS:            |   |
| PROGRAM SERVICE EXPENSES  | 4,964,357.                                |
| MANAGEMENT AND GENERAL EXPENSES                                   | 1,544,822.                                |
| TOTAL EXPENSES  | 6,509,179.                                |
| TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A            | 6,509,179.                                |
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**SCHEDULE R** (Form 990)

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

Department of the Treasury Internal Revenue Service

Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

OMB No. 1545-0047

| Name of the organization THE AMERICAN   | BOARD OF INTERNAL M                                | EDICINE                                       |                               |                                       | E                                       | Employer identific<br>39-08662 |                                      | ımber                                      |
|---|--|---|-------------------------------|---------------------------------------|---|--------------------------------|--------------------------------------|--|
| Part I Identification of Disregarded Entities. Comp                                   | plete if the organization answered "Yes"           | on Form 990, Part IV, line 3                  | 3.                            |                                       |   |                                |                                      |  |
| (a) Name, address, and EIN (if applicable) of disregarded entity                      | (b) Primary activity                               | (c) Legal domicile (state of foreign country) | or Total inco                 | me End-of-year                        |   | ts Direct c                    | <b>(f)</b> Direct controlling entity |  |
|   |  |   |                               |                                       |   |                                |                                      |  |
|   |  |   |                               |                                       |   |                                |                                      |  |
|   |  |   |                               |                                       |   |                                |                                      |  |
| Part II Identification of Related Tax-Exempt Organ organizations during the tax year. | izations. Complete if the organization a           | answered "Yes" on Form 990                    | D, Part IV, line 34, I        | pecause it had one                    | or mo                                   | ore related tax-exer           | npt                                  |  |
| (a) Name, address, and EIN of related organization                                    | <b>(b)</b><br>Primary activity                     | (c) Legal domicile (state or foreign country) | (d)<br>Exempt Code<br>section | (e) Public charity status (if section | Di                                      | (f) irect controlling entity   | conti                                | <b>g)</b><br>512(b)(13)<br>rolled<br>tity? |
|   |  |   |                               | 501(c)(3))                            |   |                                | Yes                                  | No   |
| ABIM FOUNDATION - 23-2585181  510 WALNUT STREET, SUITE 1700  PHILADELPHIA, PA 19106   | TO SUPPORT THE AMERICAN BOARD OF INTERNAL MEDICINE | PENNSYLVANIA                                  | 501(C)(3)                     |                                       | THE AMERICAN BOARD OF INTERNAL MEDICINE |                                | X                                    |  |
|   |  |   |                               |                                       |   | <u></u>                        | 21                                   |  |
|   |  |   |                               |                                       |   |                                |                                      |  |
|   |  |   |                               |                                       |   |                                |                                      |  |

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Schedule R (Form 990) 2022

Page 2

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

| (a)  | (b)              | (c)               | (d)                | (e)  | (f)            | (g)  | (I     |        | (i)             | (          |  | (k) |
|--|------------------|-------------------|--------------------|--|----------------|--|--------|--------|-----------------|------------|--|-----|
| Name, address, and EIN of related organization | Primary activity | Legal<br>domicile | Direct controlling | Predominant income   | Share of total | Share of end-of-year assets    Disproportionate allocations?   Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) |        | Gene   | ral or l        | Percentage |  |     |
| or related organization                        |                  | (state or foreign | entity             | (related, unrelated,<br>excluded from tax under<br>sections 512-514) | income         | end-of-year<br>assets  | alloca | tions? | 20 of Schedule  | parti      | General or Percentag<br>managing<br>partner? ownership |     |
|  |                  | country)          |                    | sections 512-514)  |                |  | Yes    | No     | K-1 (Form 1065) | Yes        | No   |     |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  |     |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  |     |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  |     |
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|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
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|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    |  |                |  |        |        |                 |            |  | I   |
|  |                  |                   |                    | <u>l</u>   |                | l  | l .    | l .    | ı               | _          | ш  |     |

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

| (a) Name, address, and EIN of related organization | <b>(b)</b><br>Primary activity | (c) Legal domicile (state or foreign country) | (d)<br>Direct controlling<br>entity | (e) Type of entity (C corp, S corp, or trust) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Percentage<br>ownership | ent | ction<br>b)(13)<br>rolled<br>tity? |
|--|--------------------------------|---|-------------------------------------|---|---------------------------------|--|--------------------------------|-----|------------------------------------|
|  |                                | ,   |                                     |   |                                 |  |                                | Yes | No                                 |
|  |                                |   |                                     |   |                                 |  |                                |     |                                    |
|  |                                |   |                                     |   |                                 |  |                                |     |                                    |
|  |                                |   |                                     |   |                                 |  |                                |     |                                    |
|  |                                |   |                                     |   |                                 |  |                                |     |                                    |

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

| Not | e: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.   |   |                               |  |       | Yes | No |  |  |  |
|-----|--|---|-------------------------------|--|-------|-----|----|--|--|--|
| 1   | During the tax year, did the organization engage in any of the following transactions  | s with one or more re                   | lated organizations listed in | n Parts II-IV?                           |       |     |    |  |  |  |
| а   | Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity  | <i>'</i>                                |                               |  | 1a    |     | X  |  |  |  |
|     | Gift, grant, or capital contribution to related organization(s)  |   |                               |  | 1b    |     | X  |  |  |  |
|     | Gift, grant, or capital contribution from related organization(s)  |   |                               |  | 1c    |     | X  |  |  |  |
|     | Loans or loan guarantees to or for related organization(s)   |   |                               |  | 1d    |     | X  |  |  |  |
|     | Loans or loan guarantees by related organization(s)  |   |                               |  | 1e    |     | X  |  |  |  |
|     |  |   |                               |  |       |     |    |  |  |  |
| f   | Dividends from related organization(s)   |   |                               |  | 1f    |     | X  |  |  |  |
|     | g Sale of assets to related organization(s)  |   |                               |  |       |     |    |  |  |  |
|     | Purchase of assets from related organization(s)  |   |                               |  | 1h    |     | X  |  |  |  |
| i   |  |   |                               |  | 1i    |     | X  |  |  |  |
| j   | i Exchange of assets with related organization(s) j Lease of facilities, equipment, or other assets to related organization(s)   |   |                               |  |       |     |    |  |  |  |
|     |  |   |                               |  |       |     |    |  |  |  |
| k   | Lease of facilities, equipment, or other assets from related organization(s)   |   |                               |  | 1k    |     | X  |  |  |  |
| - 1 | Performance of services or membership or fundraising solicitations for related organ   | nization(s)                             |                               |  | 11    | Х   |    |  |  |  |
| m   | Performance of services or membership or fundraising solicitations by related organ  | nization(s)                             |                               |  | 1m    |     | X  |  |  |  |
| n   | Sharing of facilities, equipment, mailing lists, or other assets with related organization   | on(s)                                   |                               |  | 1n    | Х   |    |  |  |  |
| 0   | Sharing of paid employees with related organization(s)   |   |                               |  | 10    | Х   |    |  |  |  |
|     |  |   |                               |  |       |     |    |  |  |  |
| р   | Reimbursement paid to related organization(s) for expenses   |   |                               |  | 1p    |     | X  |  |  |  |
|     | Reimbursement paid by related organization(s) for expenses   |   |                               |  | 1q    | X   |    |  |  |  |
|     |  |   |                               |  |       |     |    |  |  |  |
| r   | Other transfer of cash or property to related organization(s)  |   |                               |  | 1r    |     | X  |  |  |  |
|     | Other transfer of cash or property from related organization(s)  |   |                               |  | 1s    |     | X  |  |  |  |
| 2   | If the answer to any of the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instructions for information on whether the above is "Yes," see the instruction of the above is "Yes," and "Yes," | ho must complete th                     | is line, including covered re | elationships and transaction thresholds. |       |     |    |  |  |  |
|     | (a) Name of related organization   | <b>(b)</b><br>Transaction<br>type (a-s) | <b>(c)</b><br>Amount involved | (d)<br>Method of determining amount invo | olved |     |    |  |  |  |
|     | ARIM FOIDINATION   | _                                       | 1/12 922                      | CACU _ ACMILAT COCM                      |       |     |    |  |  |  |

## Schedule R (Form 990) 2022 THE AMERICAN BOARD OF INTERNAL MEDICINE

Part VI Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a)<br>Name, address, and EIN<br>of entity | <b>(b)</b><br>Primary activity | (c) Legal domicile (state or foreign country) | (d) Predominant income (related, unrelated, excluded from tax under sections 512-514) | Are all partners sec 501(c)(3) orgs.? | (g)<br>Share of<br>end-of-year<br>assets | Disprition allocat | opor-<br>late<br>tions? | General manage partner | (k) Percentage ownership |
|--|--------------------------------|---|---|---------------------------------------|--|--------------------|-------------------------|------------------------|--------------------------|
|  |                                |   |   |                                       |  |                    |                         |                        |                          |
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| Schedule R | (Form 990) 2022<br>Supplemental Infor | THE         | AMERICAN         | BOARD        | OF     | INTERNAL           | MEDICINE | 39-0866228 | Page <b>5</b> |
|------------|---------------------------------------|-------------|------------------|--------------|--------|--------------------|----------|------------|---------------|
| Part VII   |                                       |             |                  |              |        |                    |          |            |               |
|            | Provide additional informa            | ation for r | esponses to ques | tions on Scl | hedule | R. See instruction | ns.      |            |               |
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