### Form **8453-TE**

# Tax Exempt Entity Declaration and Signature for Electronic Filing

1	06/30	. 20	23

For calendar year 2022, or tax year beginning 07/01 , 2022, and ending 06/30 , Department of the Treasury For use with Forms 990, 990-EZ, 990-PF, 990-T, 1120-POL, 4720, 8868, 5227, 5330, and 8038-CP

OMB No. 1545-0047

Internal ne	venue Service		Go to wi	vw.irs.gov/Form	3453TE for the late	SUMIORMA	ation.		l	
Name of fil	er	42-161(27) 100-101 100-101						EIN or SS		
OKLAHO	MA MEDICAL	RESEARCH FO	OUNDATION		(4)				73-0580274	
Part I		Return and								
and Form 6a, 7a, 8 6b, 7b, 8	n 5330 filers r <b>a, 9a,</b> or <b>10a</b> 8 <b>b, 9b,</b> or <b>10</b> b	nay enter dolla below, and the	rs and cents. e amount on the applicable, bl	For all other forn hat line of the rea ank (do not ente	E and enter the ap ns, enter whole do curn being filed wit r -0-). If you entere	llars only. h this forn	If you check th n was blank, th	e box on en leave	line 1a, 2a, 3a, line 1b, 2b, 3b,	4a, 5a, 4b, 5b,
		ck here			y (Form 990, Part	VIII, colun	nn (A), line 12)		<b>1b</b> 114,3	11,660
		check here .			y (Form 990-EZ, li				2b	
3a F	orm 1120-PC	L check here			0-POL, line 22)				3b	
4a F	orm 990-PF	check here .	☐ b Tax	based on inve	stment income (Fo	orm 990-F	PF, Part V, line	5) .	4b	
5a F	orm 8868 ch	eck here	☐ b Bal	ance due (Form	8868, line 3c) .				5b	
6a F	orm 990-T cl	neck here .	☐ b Tot	al tax (Form 990	-T, Part III, line 4)		e :e e e e		6b	
7a F	7a Form 4720 check here D b Total tax (Form 4720, Part III, line 1)								7b	
8a F	orm 5227 ch	eck here	☐ b FM	V of assets at e	nd of tax year (Fo	rm 5227,	Item D)		8b	
9a F	orm 5330 ch	eck here			0, Part II, line 19)				9b	
10a F	orm 8038-CI				ayment requested	(Form 803	8-CP, Part III, li	ne 22) 1	10b	
Part II	Declara	tion of Office	cer or Perso	on Subject to	Tax					
	I authorize the U.S. Treasury and its designated Financial Agent to initiate an Automated Clearing House (ACH) electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.									
b [	executed t 990-PF (as	he electronic o specifically ide	disclosure con entified in Part	sent contained to above) to the s	ies) regulating cha within this return a elected state agen	allowing d ncy(ies).	isclosure by the	e IRS of	this Form 990/9	90-EZ/
Under pe (name of		jury, I declare t	that 🗹 I am	an officer of the	above named ent	ity or $\square$	I am the perso	n subjec , (EIN)		
(								, (⊏114)		,
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#### **PUBLIC DISCLOSURE COPY**

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

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

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

Open to Public Inspection

Α	For the	2022 calend	dar year, or tax year beginning		, 2022, and end	ing 06/3	30	<b>, 20</b> 23
B	Check if	applicable:	C Name of organization OKLAHO Doing business as	MA MEDICAL RESEA	ARCH FOUNDATION		D Empl	oyer identification number 73-0580274
H		Ŭ			.t	De esse /essite	E Talan	
	Name ch Initial retu	-	Number and street (or P.O. box if 825 NE 13TH STREET	mail is not delivered to s	street address)	Room/suite	E relepi	hone number (405) 271-7421
		rn/terminated	City or town, state or province, co OKLAHOMA CITY, OK 73104	ountry, and ZIP or foreigr	n postal code		G Gross	s receipts \$ 185,636,247
$\vdash$	Amended	•	F Name and address of principal off	· TIM HACCENI \/I	D AND CEO	114 3 1 111		
Ш	Application	on pending	SAME AS C ABOVE	icer: TilviTiAGGEN VI	AND CI O	1		for subordinates? Yes No
_	T		<u></u>	\				tes included?  Yes No
÷		npt status:	✓ 501(c)(3)	) (insert no.)	4947(a)(1) or 527			ist. See instructions.
<u>.                                    </u>	Website			🗆	1	H(c) Group e		
_		organization:		tion Other	L Year of form	mation: 1946	M State	of legal domicile: OK
P	art I	Summa	-		OKI	NIOMA MEDICAL	DECE	ADOLL FOLINDATION
•	1		cribe the organization's miss					
Governance			DEDICATED TO DEVELOPING	A BETTER UNDERS	TANDING OF AND M	ORE EFFECTIVE	IREAL	MENIS FOR
rna		HUMAN DI						
Ve	1		box if the organization d	•	•		1 1	1
Ğ	1		voting members of the gove				3	62
တ္			independent voting member		• •	,	4	62
itie	1		per of individuals employed in	•	,		5	639
Activities &	1		per of volunteers (estimate if				6	62
ď	1		ated business revenue from	,	, ,		7a	0
	b	Net unrelat	ted business taxable income	from Form 990-T, F	Part I, line 11		7b	0
				Prior Yea		Current Year		
e	8		ons and grants (Part VIII, line		293,950	71,342,417		
en	9	•	ervice revenue (Part VIII, line	749,144				
Revenue	10		t income (Part VIII, column (A	• • • • • • • • • • • • • • • • • • • •	•		149,737	5,086,620
_	11		nue (Part VIII, column (A), line		·		252,044	
		•	ue-add lines 8 through 11 (n			107,7	744,875	
	1		d similar amounts paid (Part I					0
	1		aid to or for members (Part IX					
es	15		ther compensation, employee	•		43,0	028,876	46,111,500
ens	16a		al fundraising fees (Part IX, c	, ,,			0	0
Expenses	b		raising expenses (Part IX, col		2,546,970	50.6	111 007	04.070.007
	17		enses (Part IX, column (A), lin		•		911,297	61,973,997
	1		nses. Add lines 13–17 (must	•			940,173	
. "		Revenue le	ess expenses. Subtract line 1	8 from line 12			304,702	
ts or		<del>-</del>	. (D . ) ( I' 10)			Beginning of Curr		
Net Assets or Fund Balances	20		, ,				312,009	485,930,868
let A	21		ties (Part X, line 26)			-	583,504 228,505	34,892,698
			or fund balances. Subtract li	ine 21 from line 20		430,2	28,505	451,038,170
	art II		re Block					
			, I declare that I have examined this e. Declaration of preparer (other than					my knowledge and belief, it is
_								
Sig	an	Signature of	officer			L		
	ere	"	ASSEN, VP AND CHIEF FINAN	CIAL OFFICER		Date		
116	51 6		name and title	SINE OF FIGER				
_		· ·	preparer's name	Preparer's signature		Date		☐ if PTIN
Pa		1	, p. sparor o namo				Check self-em	<b>□</b> "
	epare	L Lives's man	ma			Fir		
Us	se Only	Firm's nan				Firm's		
1/10	ny the ID	Firm's add	this return with the preparer s	shown above? See	instructions	Phone	± 110.	. Yes No
				·			· · ·	Form <b>990</b> (2022)
LOI	raperw	ork neauct	tion Act Notice, see the separa	te mistructions.	Ca	t. No. 11282Y		rorm <b>330</b> (2022)

Form 990 (2022)

Part I	Statement of Program Service Accomplishments Check if Schedule O contains a response or note to any line in this Part III
1	Briefly describe the organization's mission:  OMRF IS DEDICATED TO DEVELOPING A BETTER UNDERSTANDING OF MORE EFFECTIVE TREATMENTS FOR HUMAN  DISEASE.
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.  Did the organization cease conducting, or make significant changes in how it conducts, any program
Ü	services?
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 \$ 41,718,442 including grants of \$ ) (Revenue \$ 18,306,953 ) ARTHRITIS AND CLINICAL IMMUNOLOGY/CLINICAL OPERATIONS - THE NATIONAL INSTITUTES OF HEALTH SELECTED A PAIR OF PROJECTS LED BY OMRF AS PART OF ITS NEW IMMUNE DRIVERS OF AUTOIMMUNE DISEASE PROGRAM, WHICH CASTS LIGHT ON EARLY EVENTS IN DISEASES LIKE LUPUS AND RHEUMATOID ARTHRITIS. SCIENTISTS ALSO TEAMED UP TO RENEW TWO MAJOR FEDERAL GRANTS, ONE TARGETED AT BUILDING OKLAHOMA'S
	CLINICAL RESEARCH INFRASTRUCTURE AND IMPROVING THE HEALTH OF THE STATE'S CITIZENS, THE OTHER
	SUPPORTING ARTHRITIS AND AUTOIMMUNE DISEASE RESEARCH AT OMRF AND ACROSS THE US. IN ADDITION,
	RESEARCHERS PUBLISHED STUDIES ADVANCING OUR KNOWLEDGE OF AUTOIMMUNE DISEASES, WHICH AFFECT AN ESTIMATED 25 MILLION AMERICANS, AND PROVIDED COMPASSIONATE CARE TO THOUSANDS OF PATIENTS LIVING
	WITH MULTIPLE SCLEROSIS, LUPUS AND VARIOUS FORMS OF ARTHRITIS.
	/O
4b	(Code: ) (Expenses \$ 7,915,508 including grants of \$ ) (Revenue \$ 9,147,319 ) AGING AND METABOLISM RESEARCH PROGRAM - THIS PROGRAM ADDED TWO PRINCIPAL SCIENTISTS IN 2023.
	BOTH OF WHOM WILL ACCELERATE OUR WORK IN CRUCIAL AREAS. DR. HEATHER RICE FOCUSES ON THE PROTEIN
	AMYLOID BETA, WHICH IS BELIEVED TO PLAY A CENTRAL ROLE IN THE DEVELOPMENT OF ALZHEIMER'S
	DISEASE. AND DR. SUE BODINE IS AN INTERNATIONAL LEADER IN THE STUDY OF MUSCLE LOSS AS WE GROW
	OLDER. THESE RESEARCHERS WILL COMPLEMENT THE WORK OF OUR EXISTING SCIENTIFIC TEAM, WHO SECURED A SERIES OF NEW GRANTS FROM FEDERAL AND NONPROFIT FUNDERS. WITH THE AWARDS, WE WILL CONTINUE TO
	DEVELOP A DEEPER UNDERSTANDING OF A BROAD SPECTRUM OF AGE-RELATED HEALTH CONDITIONS, FROM
	DEMENTIA AND VISION LOSS TO HEART DISEASE AND DIABETES.
4c	(Code: ) (Expenses \$ 7,760,236 including grants of \$ ) (Revenue \$ 9,255,819 ) CARDIOVASCULAR BIOLOGY RESEARCH PROGRAM - THIS YEAR WAS MARKED BY A WATERSHED DISCOVERY. IN EACH
	OF US, HEART VALVES OPEN AND CLOSE APPROXIMATELY 40 MILLION TIMES A YEAR, PERMITTING PROPER
	BLOOD FLOW WHEN THEY OPEN AND PREVENTING LEAKAGE WHEN THEY CLOSE. UNFORTUNATELY, IN ROUGHLY 7
	MILLION AMERICANS, THOSE VALVES DON'T FUNCTION PROPERLY. OVER TIME, THIS CONDITION LEADS TO
	IMPAIRED QUALITY OF LIFE, DISABILITY AND, ULTIMATELY, HEART FAILURE. IN 2023, DR. SATHISH SRINIVASAN IDENTIFIED A MOLECULE THAT SHOWS PROMISE FOR PREVENTING HEART VALVE DISEASE. FUTURE
	RESEARCH WILL BUILD ON THIS BREAKTHROUGH, WITH THE GOAL OF FINDING A TREATMENT FOR THE MILLIONS
	OF PEOPLE WHO LIVE WITH THIS DEBILITATING, LIFE-THREATENING DISEASE.
4d	Other program services (Describe on Schedule O.) (Expenses \$ 43,293,925 including grants of \$ 0 ) (Revenue \$ 35,305,207 )
4e	(Expenses \$ 43,293,925 including grants of \$ 0 ) (Revenue \$ 35,305,207 )  Total program service expenses 100.688.111

#### 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	~	
2	Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	~	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If</i> "Yes," complete Schedule C, Part I	3		~
4	<b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If</i> "Yes," <i>complete Schedule C, Part II</i>	4	~	
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		,
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		~
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If</i> "Yes," <i>complete Schedule D, Part II</i>	7		~
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If</i> "Yes," complete Schedule D, Part III	8		~
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? <i>If</i> "Yes," <i>complete Schedule D, Part IV</i>	9		~
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If</i> "Yes," <i>complete Schedule D, Part V</i>	10	~	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, 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	~	
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	~	
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? <i>If "Yes," complete Schedule D, Part VIII </i>	11c		,
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? <i>If "Yes," complete Schedule D, Part IX</i>	11d	~	
e f	Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> 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)? <i>If "Yes," complete Schedule D, Part X</i>	11e	<i>v</i>	
12a		12a	_	
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	~	
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		~
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		~
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? <i>If "Yes," complete Schedule F, Parts I and IV.</i>	14b	~	
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? <i>If "Yes," complete Schedule F, Parts II and IV</i>	15		~
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		~
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? <i>If "Yes," complete Schedule G, Part I.</i> See instructions	17		~
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	18	~	
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		~
20a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		~
b 21	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?  Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	20b 21		·

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Part	V Checklist 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		~
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	~	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b			
	through 24d and complete Schedule K. If "No," go to line 25a	24a	~	
b	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		<b>'</b>
25a	<b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a		~
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		~
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current			
	or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>	26		~
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key	20		
	employee, creator or founder, substantial contributor or employee thereof, a grant selection committee			
	member, or to a 35% controlled 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 "Yes," complete Schedule L, Part IV	28a		~
b	A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	28b		~
	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		<b>V</b>
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	~	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified			
	conservation contributions? If "Yes," complete Schedule M	30		~
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31		~
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	32		>
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations			
34	sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	•	
٠.	or IV, and Part V, line 1	34		~
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		~
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a			
	controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b		
36	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2 </i>	36		<b>'</b>
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37		<b>V</b>
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O		_	
Part	·	38	•	
rait	Check if Schedule O contains a response or note to any line in this Part V			
	· · · · · · · · · · · · · · · · · · ·		Yes	No
1a	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 1b 0			
С	Did the organization comply with backup withholding rules for reportable payments to vendors and			
	reportable gaming (gambling) winnings to prize winners?	1c	~	

Form 990 (2022)

Part	V Statements Regarding Other IRS Filings and Tax Compliance (continued)		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return 2a 639			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? .	2b	~	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	~	
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O .	3b	~	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4 -		
h		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		~
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		1
С	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?	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).	OD	_	
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods			
	and services provided to the payor?	7a		
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
С	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was			
	required to file Form 8282?	7с		~
d	If "Yes," indicate the number of Forms 8282 filed during the year	_		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?.	7e 7f		レ
f g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	~	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	~	
8	Sponsoring organizations maintaining donor advised funds. 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.			
а	Did the sponsoring organization make any taxable distributions under section 4966?	9a		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10	Section 501(c)(7) organizations. Enter:			
a b	Initiation fees and capital contributions included on Part VIII, line 12			
11	Section 501(c)(12) organizations. Enter:			
а	Gross income from members or shareholders			
b	Gross income from other sources. (Do not net amounts due or paid to other sources			
	against amounts due or received from them.)			
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.  Is the organization licensed to issue qualified health plans in more than one state?	13a		
а	<b>Note:</b> See the instructions for additional information the organization must report on Schedule O.	ısa		
b	Enter the amount of reserves the organization is required to maintain by the states in which			
	the organization is licensed to issue qualified health plans			
С	Enter the amount of reserves on hand			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a		~
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O .	14b		
15	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?	15		~
10	If "Yes," see the instructions and file Form 4720, Schedule N.	10		. ,
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16		~
17	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.			

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Form 990 (2022)

Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions. Section A. Governing Body and Management No Yes 1a Enter the number of voting members of the governing body at the end of the tax year . . . 62 1a 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. Enter the number of voting members included on line 1a, above, who are independent . 1b 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with 2 Did the organization delegate control over management duties customarily performed by or under the direct 3 supervision of officers, directors, trustees, or key employees to a management company or other person? . 3 4 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? 5 Did the organization become aware during the year of a significant diversion of the organization's assets? . 5 6 6 Did the organization have members, stockholders, or other persons who had the power to elect or appoint 7a Are any governance decisions of the organization reserved to (or subject to approval by) members, 7b Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 8a 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 . . . . . 9 Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) Yes No **10a** Did the organization have local chapters, branches, or affiliates? 10a 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 1 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? 11a **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 Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? 12b Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," 12c 13 Did the organization have a written whistleblower policy? . . . . . . . . . . . . 13 V 14 14 Did the organization have a written document retention and destruction policy? 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? The organization's CEO, Executive Director, or top management official . . . 15a 15b 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 16a 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 Section C. Disclosure List the states with which a copy of this Form 990 is required to be filed OK 17 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c) 18 (3)s only) available for public inspection. Indicate how you made these available. Check all that apply. ✓ Upon request Other (explain on Schedule O) Own website Another's website 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. 20 TIM HASSEN, VP AND CHIEF FINANCIAL OFFICER, 825 NE 13TH STREET, OKLAHOMA CITY, OK 73104, (405) 271-7421

Part VI

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

#### 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	d organization compensa	ted any current	officer, director,	or trustee.	
		(C)				

(A) Name and title	(B) Average hours per week	(do n box, office	ot ch unles er and	Pos neck ss pe d a d	ition more rson lirect	e than o	one n an tee)	(D)  Reportable compensation from the	<b>(E)</b> Reportable compensation from related	(F) Estimated amount of other compensation
	(list any hours for related organizations below dotted line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	organization (W-2/ 1099-MISC/ 1099-NEC)	organizations (W-2/ 1099-MISC/ 1099-NEC)	from the organization and related organizations
(1) ANDREW WEYRICH, PHD	50.0			~						
PRESIDENT AND CEO								672,712	0	85,296
(2) JUDITH JAMES  VP OF CLINICAL AFFAIRS AND PROGRAM CHAIR	50.0			~				475,957	0	104,442
(3) GABRIEL PARDO , MD	50.0				_					<u> </u>
ASSOCIATE PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY								368,736	0	54,656
(4) ADAM COHEN	50.0			~						
SR VP AND GENERAL COUNSEL								340,415	0	57,319
(5) RODGER MCEVER , MD	50.0			~						
VP OF RESEARCH								349,220	0	45,732
(6) LIJUN XIA , MD	50.0				~					
PROGRAM CHAIR, CARDIOVASCULAR BIOLOGY					-			302,230	0	72,758
(7) PATRICK GAFFNEY, MD	50.0									
PROGRAM CHAIR, GENES AND HUMAN DISEASE					-			310,352	0	62,858
(8) SWAPAN NATH , PHD	50.0					~				
PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY								309,096	0	53,584
(9) FLOREA LUPU, PHD	50.0					~				
PROFESSOR, CARDIOVASCULAR BIOLOGY								320,317	0	40,908
(10) TIM HASSEN  VP AND CFO	50.0			~				282,285	0	66,629
(11) PENNY VOSS	50.0			,						<u> </u>
VP OF PHILANTHROPY								246,527	0	63,779
(12) BERKLEY CHELSEA, MD	50.0					~				
CLINICAL ASSISTANT PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY								269,260	0	33,105
(13) ALIREZA REZAIE, PHD	50.0					~				
PROFESSOR, CARDIOVASCULAR BIOLOGY		1						250,227	0	41,421
(14) MERRILL JOAN, MD PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY	50.0					_		252,606	0	27,462
- THOI LOOCK, ARTHRITIO AND CLINICAL IMMUNOLOGY								202,000	0	21,402

Form **990** (2022)

Part VII Section A. Officers, Directors,	Trustees,	Key I	Εmį	plo	yee	s, an	nd Highest Compensated Employees (continued					nued)	
				(	C)								
(A)	(B)				sition			(D)	(E)	(F)			
Name and title	Average					e than c ı is both		Reportable	Reportal	ble	Estima	ited am	ount
	hours					or/trust		compensation	compensa	ation	0	f other	
	per week (list any	악	lŋ,	으	₩ ₩	en H	Fo	from the organization (W-2/	from rela organizations			pensation	on
	hours for	Individual trustee or director	Institutional trustee	Officer	Key employee	ghes	Former	1099-MISC/	1099-MIS			ization	and
	related	dual	tion	¬	m	st co	4	1099-NEC)	1099-NE	EC)	related of	organiza	ations
	organizations below	r ti	al t		oye	) mp							
	dotted line)	stee	tsu,		Φ	ens							
			ee			Highest compensated employee							
(15) COURTNEY GRIFFIN , PHD	50.0												
VP OF RESEARCH (TRAINING)		-		1				218,793		0		4	0,159
(16) COURTNEY GREENWOOD	50.0							,					
VP OF HUMAN RESOURCES		1		1				199,778		0		4	5,418
(17) LISA DAY	50.0							,					
VP OF GOVERNMENT AFFAIRS		1		1				178,756		0		3	1,619
(18) BENJAMIN MILLER, PHD	50.0							,					
PROGRAM CHAIR, AGING AND METABOLISM	+	1			1			167,302		0		2	2,605
(19) ANN FELTON	1.0							,					
BOARD MEMBER	+	·						0		0			0
(20) BARBARA BRAUGHT	1.0												
BOARD MEMBER	+	·						0		0			0
(21) BARRY POLLARD, MD	1.0												
BOARD MEMBER	<del> </del>	·						0		0			0
(22) BECKY SWITZER	1.0												
BOARD MEMBER	<del> </del>	·						0		0			0
(23) BETSY THORPE	1.0												
BOARD MEMBER	+	·						0		0			0
(24) BILL ANOATUBBY	1.0												
BOARD MEMBER		·						0		0			0
(25) (SEE STATEMENT)													
<u> </u>		-											
1b Subtotal			_	_	_		_	5,514,569		0		94	9,750
c Total from continuation sheets to Part	VII. Section	n A						0		0			0
d Total (add lines 1b and 1c)	•							5,514,569		0		94	9,750
2 Total number of individuals (including but	t not limited	d to th	1056	e list	ted	above	e) w	ho received more	e than \$10	0,000	of		
reportable compensation from the organ							,	75	·	,			
												Yes	No
3 Did the organization list any former	officer, dire	ector,	tru	iste	e, k	cey er	mpl	loyee, or highes	st compen	sated			
employee on line 1a? If "Yes," complete							٠.				3		~
4 For any individual listed on line 1a, is the	sum of re	portal	ble	con	npe	nsatio	n a	nd other compe	nsation fro	m the			
organization and related organizations													
individual											4	~	
5 Did any person listed on line 1a receive of	or accrue co	ompe	nsa	tion	fro	m any	un un	related organizat	tion or indi	vidual			
for services rendered to the organization											5		~
Section B. Independent Contractors													
1 Complete this table for your five high	nest comp	ensate	ed	inde	epe	ndent	СО	ntractors that r	eceived n	nore 1	han \$	100,00	00 of
compensation from the organization. Rep													
(A)								(B)			(C)		
Name and business add	dress							Description of serv	vices	(	Compens	ation	
INFUSION MANAGEMENT LLC, 11233 SHADOW CREEK P	WKY, SUITE	303, PE	ARL	AND	, TX	77584	INF	FUSION MANAGEMENT	SERVICES			20,44	8,383
ADAMADK 24962 NETWORK DL CHICAGO IL 606	72 12/10						ш	OLIGENEEDING GI	EDVICES			56	0 /1/

(A)
Name and business address

INFUSION MANAGEMENT LLC, 11233 SHADOW CREEK PWKY, SUITE 303, PEARLAND, TX 77584 INFUSION MANAGEMENT SERVICES
ARAMARK, 24863 NETWORK PL, CHICAGO, IL 60673-1248

CAPTRUST PARTNERS LLC, 6305 WATERFORD BLVD, #120, OKLAHOMA CITY, OK 73118 INVESTMENT MANAGEMENT SERVICES
GRANT THORNTON LLP, 211 N ROBINSON, SUITE 1200, OKLAHOMA CITY, OK 73102 AUDIT SERVICES

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

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### Part VIII Statement of Revenue

	Check if Schedule O contains a response or note to any line in this Part VIII												
							(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512–514			
က် လ	1a	Federated campaig	ns .		1a	91,137							
Contributions, Gifts, Grants, and Other Similar Amounts	b	Membership dues			1b	,							
Gr	С	Fundraising events			1c	787,935							
ts,	d	Related organization			1d	707,000							
ia i	<u></u>	Government grants			1e	39,156,755							
is,	f	All other contribution				00,100,700							
ion	•	and similar amounts no			1f	31,306,590							
but	а	Noncash contribution				31,300,390							
	9	lines 1a–1f			1g	¢ 400 405							
anc	h	Total. Add lines 1a-					71 242 417						
0 "	h	Total. Add lines 1a-	-11 .		•	Business Code	71,342,417						
ø.	2a	CLINIC REVENUE				621990	20.761.222	20.761.222					
Vic		CLINIC REVENUE				021990	30,761,232	30,761,232					
Ser		b											
m (er	C												
gram Ser Revenue	d												
Program Service Revenue	e	A II - +I											
Δ.	f	All other program se					0	0	0	0			
	<u>g</u> 3	Total. Add lines 2a- Investment income					30,761,232						
	3						9,454,687			9,454,687			
	other similar amounts)				88,631			88,631					
	4	Income from investment of tax-exempt bo					4,872,742	2,947,012		1,925,730			
	5	Royalties		(i) Rea		(ii) Personal	4,012,142	2,547,012		1,323,730			
	0-	Oue ee wente	C-	.,	4,818	(II) Fersonal							
	6a	Gross rents	6a	30	4,010								
	b	Less: rental expenses	6b	20	4 040	0							
	C	Rental income or (loss)			4,818		384,818			384,818			
	d 7-	Net rental income o	r (ios:	(i) Securit		(ii) Other	304,010			304,010			
	7a	Gross amount from sales of assets		(i) Securit	103	(ii) Other							
		other than inventory	7a	66,70	6,331	2,575							
4	h	Less: cost or other basis	1 a										
Revenue	b	and sales expenses .	7b	70,18	1 183	984,421							
Ş.	•	Gain or (loss)	7c	(3,474		(981,846)							
Re		Net gain or (loss)				, ,	(4,456,698)			(4,456,698)			
Jer							(4,400,000)			(4,400,000)			
Other	oa	Gross income from events (not including		787,935									
		of contributions rep											
		1c). See Part IV, line			8a	47,520							
	b	Less: direct expens			8b	158,983							
	C	Net income or (loss)					(111,463)			(111,463)			
	9a	Gross income f			]		. ,						
		activities. See Part I			9a								
	b	Less: direct expens	es .		9b								
		Net income or (loss)				es							
		Gross sales of in											
		returns and allowan	ces		10a								
	b	Less: cost of goods	sold		10b								
	С	Net income or (loss)	from	sales of in	vento	ory							
<u>s</u>	_		_		_	Business Code							
90L	11a	LABORATORY INCO	ME			621500	1,596,963	1,596,963					
ane	b	CAFE INCOME				722514	378,331			378,331			
scellaneo Revenue	С												
Miscellaneous Revenue	d	All other revenue					0	0	0	0			
2	е	Total. Add lines 11a					1,975,294						
	12	Total revenue. See instructions					114,311,660	35,305,207	0	7,664,036			

### Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

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

-	Check if Schedule O contains a response				
Do no	ot include amounts reported on lines 6b, 7b,	(A)	(B)	(C)	(D)
	o, and 10b of Part VIII.	Total expenses	Program service expenses	Management and general expenses	Fundraising expenses
1	Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21		expenses:	general expenses	enpeniese
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 5	Benefits paid to or for members Compensation of current officers, directors, trustees, and key employees	3,726,967	3,045,254	435,187	246,526
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	32,040,527	29,679,934	1,198,333	1,162,260
8	Pension plan accruals and contributions (include				
	section 401(k) and 403(b) employer contributions)	2,662,894	2,436,394	121,616	104,884
9	Other employee benefits	5,308,019	4,703,736	423,333	180,950
10	Payroll taxes	2,373,093	2,171,243	108,380	93,470
11	Fees for services (nonemployees):				
a	Management				
b	Legal	152,625	112,946	39,679	
C	Accounting	150,250		150,250	
d	Lobbying	73,050		73,050	
e f	Investment management fees				
g	Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	2,255,740	2,255,740	0	0
12	Advertising and promotion	2,200,140	2,233,140		
13	Office expenses	903,931	405,183	95,399	403,349
14	Information technology	1,501,379	1,243,137	183,055	75,187
15	Royalties				· · · · · · · · · · · · · · · · · · ·
16	Occupancy	5,194,874	4,205,296	989,500	78
17	Travel	717,882	650,737	53,904	13,241
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings .	247,754	213,930		33,824
20	Interest	212,993	205,726	7,267	
21	Payments to affiliates				
22	Depreciation, depletion, and amortization .	7,782,462	7,471,367	311,095	
23	Insurance	508,535	376,328	132,207	
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 O.)				
a	LAB SUPPLIES	7,402,530	7,402,530		
b	TRAINEE COSTS	922,684	922,684	40.440	44.440
c d	INHOUSE SUBCONTRACTS	1,418,688 29,508,245	1,394,157 29,508,245	13,418	11,113
u e	All other expenses	3,020,375	29,508,245	514,737	222,088
25	Total functional expenses. Add lines 1 through 24e	108,085,497	100,688,117	4,850,410	2,546,970
26	Joint costs. Complete this line only if the	100,000,497	100,000,117	4,000,410	2,340,870
	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)				
			<u> </u>		Form <b>990</b> (2022)

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### Part X Balance Sheet

Form 990 (2022)

		Check if Schedule O contains a response or note to any line in this Par	(A)		(B)
			Beginning of year		End of year
	1	Cash—non-interest-bearing	3,640	1	3,640
	2	Savings and temporary cash investments	16,213,977	2	16,174,000
	3	Pledges and grants receivable, net	10,570,230	3	10,754,989
	4	Accounts receivable, net	7,702,655	4	8,468,635
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%			
		controlled entity or family member of any of these persons	0	5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	(
က္	7	Notes and loans receivable, net	54,328	7	104,329
Assets	8	Inventories for sale or use	10,789	8	7,785
As	9	Prepaid expenses and deferred charges	596,913	9	832,803
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D   10a   241,159,094			
	b	Less: accumulated depreciation <b>10b</b> 156,802,743	86,768,230	10c	84,356,351
	11	Investments—publicly traded securities	141,958,646	11	158,961,816
	12	Investments—other securities. See Part IV, line 11	28,051,204	12	30,261,701
	13	Investments—program-related. See Part IV, line 11	0	13	0
	14	Intangible assets		14	
	15	Other assets. See Part IV, line 11	171,881,397	15	176,004,819
	16	Total assets. Add lines 1 through 15 (must equal line 33)	463,812,009	16	485,930,868
	17	Accounts payable and accrued expenses	10,104,927	17	12,345,917
	18	Grants payable		18	
	19	Deferred revenue	2,315,779	19	2,725,269
	20	Tax-exempt bond liabilities	13,935,000	20	10,935,000
	21	Escrow or custodial account liability. Complete Part IV of Schedule D.		21	
Liabilities	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%			
ab		controlled entity or family member of any of these persons		22	0
_	23	Secured mortgages and notes payable to unrelated third parties		23	
	24 25	Unsecured notes and loans payable to unrelated third parties  Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X		24	
		of Schedule D	7,227,798	25	8,886,512
	26	Total liabilities. Add lines 17 through 25	33,583,504	26	34,892,698
Seou		Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33.			
<u>a</u>	27	Net assets without donor restrictions	152,426,452	27	161,089,274
ĕ	28	Net assets with donor restrictions	277,802,053	28	289,948,896
Fund		Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33.			
ō	29	Capital stock or trust principal, or current funds		29	
	30	Paid-in or capital surplus, or land, building, or equipment fund		30	
ets				31	
ssets	31	Retained earnings, endowment, accumulated income, or other funds.		3 I	
Net Assets or Fund Balances	31 32	Total net assets or fund balances	430,228,505	32	451,038,170

Form **990** (2022)

Part	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		1	14,31	1,660
2	Total expenses (must equal Part IX, column (A), line 25)	2		1	08,08	5,497
3	Revenue less expenses. Subtract line 2 from line 1	3			6,22	6,163
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4		4	30,22	8,505
5	Net unrealized gains (losses) on investments	5			12,39	6,046
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			2,18	7,456
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line					
	32, column (B))	10		4	51,03	8,170
Part	XII 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 Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," e Schedule O.	xplain	on			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?			2a		~
	If "Yes," check a box below to indicate whether the financial statements for the year were co reviewed on a separate basis, consolidated basis, or both:					
	☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis					
b			. [	2b	~	
	If "Yes," check a box below to indicate whether the financial statements for the year were aud	lited o	n a			
	separate basis, consolidated basis, or both:					
	☐ Separate basis ☐ Both consolidated and separate basis					
С	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for over					
	the audit, review, or compilation of its financial statements and selection of an independent account			2c	~	
	If the organization changed either its oversight process or selection process during the tax year, eschedule O.	explain	on			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set for Uniform Guidance, 2 C.F.R. Part 200, Subpart F?			3a	/	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not un			Ju	•	
~	required audit or audits, explain why on Schedule O and describe any steps taken to undergo such			3b	•	

Form **990** (2022)

Part	W	П
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State of Note Note Note Note Note Note Note Note	(A) Name and Title	(B) Average hours	(C) Position (Check all that apply)						(D) Reportable compensation	(E) Reportable compensation	(F) Estimated amount of other
BOARD MEMBER		(list any hours for related organizations below dotted line)	Individual trustee or director				Highest compensated	Former	from the	from related organizations	compensation from the organization and related
BOARD MEMBER   1.0	(25) BILL HAWLEY , MD	1.0	/						0	0	0
SOARD MEMBER		4.0									
### SPRETT JAMESON, MD			1						0	0	0
BOARD MEMBER (29) BROCKS HALL (1.0		1.0									
BROOKS HALL			<b>√</b>						0	0	0
BOARD MEMBER		1.0									
SPUCE BENBROOK			<b>✓</b>						0	0	0
BOARD MEMBER		1.0	,								
BOARD MEMBER	BOARD MEMBER		<b>V</b>						0	0	0
BOARD MEMBER	(30) BURNS HARGIS		/						0	0	0
BOARD MEMBER			•						0	0	0
BOARD MEMBER			1						0	0	0
BOARD MEMBER			•						0	0	0
BOARD MEMBER	(32) CHRISTY EVEREST	1.0	/						0	0	0
BOARD MEMBER											
34) CLIFF HUDSON			1						0	0	0
BOARD MEMBER  (35) DAN LITTLE  BOARD MEMBER  (36) DAVID RAINBOLT  1.0  BOARD MEMBER  (37) DEE REPLOGLE  BOARD MEMBER  (38) ELLEN BURGESS  BOARD MEMBER  (39) GERALD GAMBLE  BOARD MEMBER  (39) GERALD GAMBLE  BOARD MEMBER  (40) GREG WALTON, MD  BOARD MEMBER  (41) HARRISON LEVY  BOARD MEMBER  (42) HIRAM CHAMPLIN  BOARD MEMBER  (43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  BOARD MEMBER  (45) JACQUI HAGLUND  1.0  BOARD MEMBER  (46) JACQUI HAGLUND  1.0  BOARD MEMBER  (47) DE CORD DE		4.0									
35 DAN LITTLE			1						0	0	0
SOARD MEMBER   SOAR		1.0									
36) DAVID RAINBOLT			1						0	0	0
SOARD MEMBER   SOAR		1.0									
SOURCE   S			✓						0	0	0
BOARD MEMBER		1.0									
38) ELLEN BURGESS	BOARD MEMBER		<b>✓</b>						0	0	0
BOARD MEMBER		1.0	,								
BOARD MEMBER  (40) GREG WALTON, MD  BOARD MEMBER  (41) HARRISON LEVY  BOARD MEMBER  (42) HIRAM CHAMPLIN  BOARD MEMBER  (43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  0  0  0  0  0  0  0  0  0  0  0  0	BOARD MEMBER		<b>V</b>						0	0	0
BOARD MEMBER  (40) GREG WALTON, MD	(39) GERALD GAMBLE	1.0	/						0	0	0
BOARD MEMBER  (41) HARRISON LEVY  BOARD MEMBER  (42) HIRAM CHAMPLIN  BOARD MEMBER  (43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	BOARD MEMBER		٧						0	0	0
BOARD MEMBER  (41) HARRISON LEVY  1.0  BOARD MEMBER  (42) HIRAM CHAMPLIN  BOARD MEMBER  (43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	(40) GREG WALTON , MD	1.0	1						0	0	0
BOARD MEMBER  (42) HIRAM CHAMPLIN  BOARD MEMBER  (43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			*						Ů		<u> </u>
BOARD MEMBER  (42) HIRAM CHAMPLIN  BOARD MEMBER  (43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  0 0 0 0 0 0 0 0 0 0 0 0 0	(41) HARRISON LEVY	1.0	1						0	0	0
BOARD MEMBER  (43) JACK MCCARTY											
(43) JACK MCCARTY  BOARD MEMBER  (44) JACQUI HAGLUND  1.0  0 0 0 0 0		1.0	1						0	0	0
BOARD MEMBER  (44) JACQUI HAGLUND		4.0									
(44) JACQUI HAGLUND 1.0 0 0 0			1						0	0	0
<u></u>		1.0									
	BOARD MEMBER		<b>√</b>						0	0	0

(A) Name and Title	(B) Average hours		(Ch	C) Po	ositior	า ply)		(D) Reportable compensation	(E) Reportable compensation	(F) Estimated amount of other	
	per week (list any hours for related organizations below dotted line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	from the organization (W-2/1099-MISC)	from related organizations (W-2/1099-MISC)	compensation from the organization and related organizations	
(45) JEROME HOLMES	1.0	1						0	0	0	
BOARD MEMBER											
(46) JII BOGHETICH	1.0	1						0	0	0	
BOARD MEMBER											
(47) JIM MORRIS	1.0	1						0	0	0	
BOARD MEMBER											
(48) JOHN GRIFFIN	1.0	1						0	0	0	
BOARD MEMBER											
	1.0	1						0	0	0	
BOARD MEMBER											
(50) JUDY HATFIELD	1.0	1						0	0	0	
BOARD MEMBER											
(51) LANCE BENHAM	1.0	1						0	0	0	
BOARD MEMBER											
(52) LARRY NICHOLS	1.0	1						0	0	0	
BOARD MEMBER											
(53) LEIGH ANN ALBERS	1.0	1						0	0	0	
BOARD MEMBER											
(54) LEN CASON	1.0	1						0	0	0	
BOARD MEMBER											
(55) LISA DILLINGHAM	1.0	1						0	0	0	
BOARD MEMBER											
(56) LOU KERR	1.0	1						0	0	0	
BOARD MEMBER											
(57) MARK COLLINS , PHD	1.0	/						0	0	0	
BOARD MEMBER											
(58) MARK FUNKE	1.0	1						0	0	0	
BOARD MEMBER	1.0										
(59) MAUTRA JONES, EDD	1.0	1						0	0	0	
BOARD MEMBER	4.0										
(60) MEG SALYER	1.0	1						0	0	0	
BOARD MEMBER	4.0										
(61) MICHAEL CAWLEY	1.0	1						0	0	0	
BOARD MEMBER	4.0										
(62) MIKE CAROLINA	1.0	1						0	0	0	
BOARD MEMBER	1.0										
(63) MINDY MAHANEY	1.0	1						0	0	0	
BOARD MEMBER	4.0										
(64) PAT ROONEY	1.0	1						0	0	0	
BOARD MEMBER	4.0										
(65) PAUL SCHULTE	1.0	1						0	0	0	
BOARD MEMBER											

(A) Name and Title	(B) Average hours per week		(Ch	C) Po	sitior	า ply)		(D) Reportable compensation	(E) Reportable compensation	(F) Estimated amount of other	
	per week (list any hours for related organizations below dotted line)	Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	from the organization (W-2/1099-MISC)	from related organizations (W-2/1099-MISC)	compensation from the organization and related organizations	
(66) RAINEY WILLIAMS , JR	1.0	1						0	0	0	
BOARD MEMBER											
(67) RAMSEY DRAKE	1.0	/						0	0	0	
BOARD MEMBER		•								, and the second	
(68) RANDY BROWN , MD	1.0	/						0	0	0	
BOARD MEMBER		•						· ·		0	
(69) RANDY HOGAN	1.0	/						0	0	0	
BOARD MEMBER		•						ŭ		Ü	
(70) REBECCA PATTEN	1.0	1						0	0	0	
BOARD MEMBER		•						0		U	
(71) RICHARD PARRY	1.0	/						0	0	0	
BOARD MEMBER		•						U	0	U	
(72) RONNIE IRANI	1.0	/						0	0	0	
BOARD MEMBER		•						U	0	U	
(73) ROSS SWIMMER	1.0	/						0	0	0	
BOARD MEMBER		•						0	0	0	
(74) SARAH YAUK	1.0	/							0	0	
BOARD MEMBER		•						0	0	0	
(75) SHARON BELL	1.0	/								0	
BOARD MEMBER		•						0	0	0	
(76) STEVEN TAYLOR	1.0	/									
BOARD MEMBER		•						0	0	0	
(77) TERENCE KERN	1.0	/									
BOARD MEMBER		•						0	0	0	
(78) TRICIA EVEREST	1.0	/									
BOARD MEMBER		<b>V</b>						0	0	0	
(79) VIRGINIA GROENDYKE	1.0	1						_	_	_	
BOARD MEMBER		<b>V</b>						0	0	0	
(80) WALT DUNCAN , IV	1.0	/									
BOARD MEMBER		<b>V</b>						0	0	0	

#### **SCHEDULE A** (Form 990)

Department of the Treasury

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

OMB No. 1545-0047

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.

Open to Public

Internal Revenue Service Go to www.irs.gov/Form990 for instructions and the latest information. Inspection Employer identification number Name of the organization OKLAHOMA MEDICAL RESEARCH FOUNDATION 73-0580274 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.) A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990).) A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: An organization operated for the benefit of a college or university owned or operated by a governmental unit described in 5 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 in section 170(b)(1)(A)(vi). (Complete Part II.) ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.) 8 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 331/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33<sup>1</sup>/<sub>3</sub>% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12a, Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving а 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. 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) d 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. Enter the number of supported organizations . . . Provide the following information about the supported organization(s). (iii) Type of organization (v) Amount of monetary (i) Name of supported organization (ii) EIN (iv) Is the organization (vi) Amount of (described on lines 1-10 listed in your governing support (see other support (see above (see instructions)) document? instructions) instructions) Yes No (A) (B) (C) (D)

(E) **Total**  Schedule A (Form 990) 2022 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.)

Secti	on A. Public Support	y quality ariao	1 110 10010 110	tou bolow, pi	odoo oompio	to r art iii.j	_
	dar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	<b>(e)</b> 2022	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	60,132,921	60,164,768	91,435,276	70,293,950	71,342,417	353,369,332
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0			0
3	The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0			0_
4	Total. Add lines 1 through 3	60,132,921	60,164,768	91,435,276	70,293,950	71,342,417	353,369,332
5	The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						54,684,654
6	Public support. Subtract line 5 from line 4						298,684,678
Secti	on B. Total Support		•	•	•		
Calen	dar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7	Amounts from line 4	60,132,921	60,164,768	91,435,276	70,293,950	71,342,417	353,369,332
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	13,563,861	3,495,987	8,109,982	15,219,254	11,853,866	52,242,950
9	Net income from unrelated business activities, whether or not the business is regularly carried on	81,073	5,337	10,725	51,456	0	148,591
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	347,212	295,959	158,503	260,020	425,851	1,487,545
11	Total support. Add lines 7 through 10						407,248,418
12	Gross receipts from related activities, etc.	. (see instruction	ns)			12	152,556,619
13	First 5 years. If the Form 990 is for the	organization's	first, second	, third, fourth,	or fifth tax ye	ar as a section	n 501(c)(3)
	organization, check this box and stop he	re					
Secti	on C. Computation of Public Suppor	rt Percentage	•				
14	Public support percentage for 2022 (line 6	3, column (f), di	vided by line 1	11, column (f))		14	73.34 %
15	Public support percentage from 2021 Sch					15	76.78 %
16a	331/3% support test-2022. If the organi					3 <sup>1</sup> /3% or more,	check this
	box and stop here. The organization qua	lifies as a publi	cly supported	organization			
b	33 <sup>1</sup> / <sub>3</sub> % support test—2021. If the organithis box and stop here. The organization						_
			,	J			
17a	10%-facts-and-circumstances test—20 10% or more, and if the organization m Part VI how the organization meets the organization	neets the facts- facts-and-circu	and-circumstaumstances tes	ances test, che t. The organiz	eck this box a ation qualifies	nd <b>stop here</b> . as a publicly	Explain in supported
b	10%-facts-and-circumstances test—20 15 is 10% or more, and if the organizatio in Part VI how the organization meets the organization	on meets the fa e facts-and-circ	cts-and-circur cumstances te	nstances test, st. The organi	check this boz zation qualifies	x and <b>stop her</b> s as a publicly	<b>e</b> . Explain supported
18	<b>Private foundation.</b> If the organization of instructions	did not check	a box on line	13, 16a, 16b,	17a, or 17b,	check this bo	x and see

Schedule A (Form 990) 2022 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 qualify under the tests listed below, please complete Part II.)

Secti	on A. Public Support	under the te	oto notoa pon	ow, picase oc	ompiete i art	,	
	dar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	<b>(e)</b> 2022	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	(4) 20 10	(5) 25 : 5	(6) 2020	(0) 202	(6) 2022	(4) 1010.
2	Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3	Gross receipts from activities that are not an unrelated trade or business under section 513						
4	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5	The value of services or facilities furnished by a governmental unit to the organization without charge						
6 7a	<b>Total.</b> Add lines 1 through 5 Amounts included on lines 1, 2, and 3 received from disqualified persons .						
b	Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
с 8	Add lines 7a and 7b						
Secti	on B. Total Support		•		•		
Calen	dar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	<b>(e)</b> 2022	(f) Total
9	Amounts from line 6						
10a	Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						
b	Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
С	Add lines 10a and 10b						
11	Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13	<b>Total support.</b> (Add lines 9, 10c, 11, and 12.)						
14	First 5 years. If the Form 990 is for the organization, check this box and stop he	•			-	ear as a sectio	
Secti	on C. Computation of Public Suppor						
15	Public support percentage for 2022 (line 8	, ,,,	•	, ( , ,			%
16	Public support percentage from 2021 Sch					16	%
	on D. Computation of Investment Inc						<del> </del>
17	Investment income percentage for 2022 (			-			<u>%</u>
18	Investment income percentage from 2021						% and line
19a	33 <sup>1</sup> /3% support tests—2022. If the organi 17 is not more than 33 <sup>1</sup> /3%, check this box						
b	33 <sup>1</sup> /3% support tests—2021. If the organiz	_	_	-		-	_
b	line 18 is not more than 331/3%, check this b						
20	Private foundation. If the organization di	_	=	•	-		_

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#### 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.)

All Supporting Organizations

ecu	on A. All Supporting Organizations			
			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.	1		
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 <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).	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.	3a		
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 <b>Part VI</b> when and how the organization made the determination.	3b		
С	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.	3c		
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.	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.	4b		
С	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 <b>Part VI</b> 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.	4c		
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 <b>Part VI</b> , 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).			
		5a		
b	<b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
С	<b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?	5c		
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 <b>Part VI</b> .	6		
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).			
0	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line	7		
8	7? If "Yes," complete Part I of Schedule L (Form 990).	8		
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 <b>Part VI</b> .	9a		
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 <b>Part VI</b> .	9b		
С	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 <b>Part VI</b> .	9c		
10a	4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated			
	supporting organizations)? If "Yes," answer line 10b below.	10a		
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.)	10b		

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Part	Supporting Organizations (continued)			_
			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?  A person who directly or indirectly controls, either alone or together with persons described on lines 11b and			
u	11c below, the governing body of a supported organization?	11a		
b	A family member of a person described on line 11a above?	11b		
	A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c,</i>	110		
	provide detail in <b>Part VI</b> .	11c		
Secti	on 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 <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.	2		
Secti	on 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 <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed			
	the supported organization(s).	1		
Secti	on 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 <b>Part VI</b> 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 <b>Part VI</b> the role the organization's supported organizations played in this regard.	3		
Secti	on E. Type III Functionally Integrated Supporting Organizations			
1 a b	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see in the organization satisfied the Activities Test. Complete line 2 below.  The organization is the parent of each of its supported organizations. Complete line 3 below.			
с 2	☐ The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a governmental entity (Activities Test. <b>Answer lines 2a and 2b below.</b>	see in	Yes	
			162	140
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 <b>Part VI identify</b> 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 <b>Part VI</b> 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. <i>Answer lines 3a and 3b below.</i>			
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 <b>Part VI</b> the role played by the organization in this regard.	3b		

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Par	Type III Non-Functionally Integrated 509(a)(3) Supporting Org	jani	izations	
1	$\square$ Check here if the organization satisfied the Integral Part Test as a qualifying	j tru	st on Nov. 20, 1970 ( <i>expla</i>	ain in <b>Part VI</b> ). <b>See</b>
	instructions. All other Type III non-functionally integrated supporting organ	izat	ions must complete Secti	ons A through E.
Sec	tion A-Adjusted Net Income		(A) Prior Year	(B) Current Year (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		
Sec	tion B—Minimum Asset Amount		(A) Prior Year	(B) Current Year (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):			
а	Average monthly value of securities	1a		
b	Average monthly cash balances	1b		
С	Fair market value of other non-exempt-use assets	1c		
d	Total (add lines 1a, 1b, and 1c)	1d		
е	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):			
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		
Sec	tion 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	<b>Distributable Amount.</b> 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-functional		Integrated Type III suppor	ting organization

Schedule A (Form 990) 2022

(see instructions).

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

Schedule A (Form 990) 2022

Excess from 2022 . . .

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Part VI	<b>Supplemental Information.</b> Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

#### Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Return Reference - Identifier	Explanation
	OTHER INCOME INCLUDES CAFETERIA SALES AS WELL AS FUNDRAISING INCOME THAT WAS NOT INCLUDED IN CONTRIBUTIONS.

Return Reference - Identifier				Explanation			
SCHEDULE A, PART II,	Description	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
LINE 10 - OTHER INCOME	(1)	347,212	295,959	158,503	260,020	425,851	1,487,545
	Total	347,212	295,959	158,503	260,020	425,851	1,487,545

#### Schedule B (Form 990)

Schedule of Contributors Attach to Form 990 or Form 990-PF.

OMB No. 1545-0047

**Employer identification number** 

Department of the Treasury Internal Revenue Service Name of the organization Go to www.irs.gov/Form990 for the latest information.

73-0580274 OKLAHOMA MEDICAL RESEARCH FOUNDATION Organization type (check one): Filers of: Section: Form 990 or 990-EZ ✓ 501(c)( 3 ) (enter number) organization 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation ☐ 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation Check if your organization is covered by the **General Rule** or a **Special Rule**. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. **General Rule** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions. **Special Rules** For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 331/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II. For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III. For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions 

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Cat. No. 30613X

Schedule B (Form 990) (2022)

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

Name of organization
OKLAHOMA MEDICAL RESEARCH FOUNDATION

Employer identification number

73-0580274

Part I	Contributors (see instructions). Use duplicate cop	oles of Part I if additional space is	needed.
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$ 37,967,890	Person Payroll Noncash  (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2		\$ 11,866,918	Person Payroll Noncash  (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3		\$ 1,638,485	Person Payroll Noncash  (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		s	Person

Name of organization
OKLAHOMA MEDICAL RESEARCH FOUNDATION

Employer identification number

73-0580274

Part II	Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				

Schedule B (Form 990) (2022)

Name of organization

OKLAHOMA MEDICAL RESEARCH FOUNDATION

73-0580274

OKLALIO	WA WILDICAL RESEARCH FO	UI
Dart III	Evaluaiyaly raligiaya	_

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) \$

Use duplicate copies of Part III if additional space is needed.

	Jse duplicate copies of Part III if add	itional space is needed.	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, an	(e) Transfer of gi	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, an	(e) Transfer of gi	ift  Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, an	(e) Transfer of gi d ZIP + 4	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	Transferee's name, address, an	(e) Transfer of gi	Relationship of transferor to transferee

#### SCHEDULE C (Form 990)

#### **Political Campaign and Lobbying Activities**

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service For Organizations Exempt From Income Tax Under section 501(c) and section 527

Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.

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

If the organization answered "Yes," on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," on Form 990, Part IV, line 5 (Proxy Tax) (See separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (See separate instructions), then

• Section 501(c)(4), (5), or (6) organizations: Complete Part III. Name of organization **Employer identification number** OKLAHOMA MEDICAL RESEARCH FOUNDATION 73-0580274 Complete if the organization is exempt under section 501(c) or is a section 527 organization. Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for 1 definition of "political campaign activities." Volunteer hours for political campaign activities. See instructions Complete if the organization is exempt under section 501(c)(3). Enter the amount of any excise tax incurred by the organization under section 4955 2 Enter the amount of any excise tax incurred by organization managers under section 4955 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? . Yes No Yes No If "Yes," describe in Part IV. Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3). Enter the amount directly expended by the filing organization for section 527 exempt function 2 Enter the amount of the filing organization's funds contributed to other organizations for section Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, 3 4 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV. (a) Name (b) Address (c) EIN (d) Amount paid from (e) Amount of political filing organization's contributions received and funds. If none, enter -0-. promptly and directly delivered to a separate political organization. If none, enter -0-. (1) (2)(3) (4)(5) (6)

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

Cat. No. 50084S

Schedule C (Form 990) 2022

Sche	dule C (Form 990) 2022					Page <b>2</b>
Par	t II-A Complete if the organization section 501(h)).	on is exempt u	under section 50	01(c)(3) and file	d Form 5768 (ele	
<b>A</b> (	Check if the filing organization belongs EIN, expenses, and share of exc			art IV each affiliate	ed group member's	name, address,
В	Check $\square$ if the filing organization checked	box A and "lim	ited control" provis	sions apply.		
	Limits on Lob	bying Expendit	ures		(a) Filing	(b) Affiliated
	(The term "expenditures" m			)	organization's totals	group totals
18	a Total lobbying expenditures to influence	public opinion	(grassroots lobbyi	ng)		
k	Total lobbying expenditures to influence	a legislative bo	ody (direct lobbying	g)		
(	Total lobbying expenditures (add lines 1	a and 1b) .				
(	d Other exempt purpose expenditures .					
•	Total exempt purpose expenditures (ad	d lines 1c and 1	d)			
f	Lobbying nontaxable amount. Enter columns.	the amount fi	rom the following	table in both		
	If the amount on line 1e, column (a) or (b) is	: The lobbying	nontaxable amoun	t is:		
	Not over \$500,000	20% of the ar	mount on line 1e.			
	Over \$500,000 but not over \$1,000,000	\$100,000 plus	s 15% of the excess	over \$500,000.		
	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus	s 10% of the excess	over \$1,000,000.		
	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus	5 5% of the excess o	ver \$1,500,000.		
	Over \$17,000,000	\$1,000,000.				
Ç	•	•				_
ł	<u> </u>					
i						
j	If there is an amount other than zero reporting section 4911 tax for this year			-	Г	<b>T</b> Yes <b>No</b>
	·					
	(Some organizations that made a se	ction 501(h) el	Period Under Sec ection do not hav ructions for lines	e to complete all	of the five column	ns below.
	Lobbyin <sub> </sub>	g Expenditures	During 4-Year A	eraging Period		
	Calendar year (or fiscal year beginning in)	<b>(a)</b> 2019	<b>(b)</b> 2020	<b>(c)</b> 2021	(d) 2022	(e) Total
28	a Lobbying nontaxable amount					
k	Lobbying ceiling amount (150% of line 2a, column (e))					
	Total lobbying expenditures					
	d Grassroots nontaxable amount					
	Grassroots ceiling amount (150% of line 2d, column (e))					
f	Grassroots lobbying expenditures					

Schedule C (Form 990) 2022

Schedule C (Form 990) 2022 Page **3** 

Part	Complete if the organization is exempt under section 501(c)(3) and has NOT f (election under section 501(h)).	iled I	Form	5768		
For e	ach "Yes" response on lines 1a through 1i below, provide in Part IV a detailed	(a	1)		(b)	
	iption of the lobbying activity.	Yes	No	Ar	nount	:
1	During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:					
а	Volunteers?		~			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	~				
c	Media advertisements?	-	~			
d	Mailings to members, legislators, or the public?		~		-	
е	Publications, or published or broadcast statements?		~			
f	Grants to other organizations for lobbying purposes?		~			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?	~			42	7,091
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		~			
i	Other activities?		~			
j	Total. Add lines 1c through 1i				42	7,091
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		~			
b	If "Yes," enter the amount of any tax incurred under section 4912					
C	If "Yes," enter the amount of any tax incurred by organization managers under section 4912 .					
d Part l	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?	(F) a				
Part	III-A Complete if the organization is exempt under section 501(c)(4), section 501(c) 501(c)(6).	(5), 0	or se	ction		
					Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?			1		
2	Did the organization make only in-house lobbying expenditures of \$2,000 or less?			2		
3 Part l	Did the organization agree to carry over lobbying and political campaign activity expenditures from the Complete if the organization is exempt under section 501(c)(4), section 501(c)	-	-			
rait	501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OF answered "Yes."				ine 3	, is
1	Dues, assessments and similar amounts from members	.	1			
2	Section 162(e) nondeductible lobbying and political expenditures (do not include amounts political expenses for which the section 527(f) tax was paid).	of		ı		
а	Current year	.	2a			
b	Carryover from last year	.	2b			
С	Total	.	2c			
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues .	.	3			
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of excess does the organization agree to carryover to the reasonable estimate of nondeductible lobby	ing		ı		
_	and political expenditures next year?		4			
5	Taxable amount of lobbying and political expenditures. See instructions	•	5			
2 (See	Supplemental Information le the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated grownstructions); and Part II-B, line 1. Also, complete this part for any additional information.  EXT PAGE	up list	); Par 	t II-A, li	nes 1	and

#### Part IV

**Supplemental Information.** Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference - Identifier	Explanation
LINE 1 - DETAILED	THE FOUNDATION'S LOBBYING ACTIVITIES ENTAIL MONITORING PROPOSED LEGISLATION AND EDUCATING LEGISLATORS AND THEIR STAFFS ABOUT THE FOUNDATION, MEDICAL RESEARCH AND THE IMPACT OF PROPOSED LEGISLATION ON MEDICAL RESEARCH AND THE FOUNDATION.

## SCHEDULE D (Form 990)

### **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.

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Name o	f the organization		Employer identification number
OKLA	HOMA MEDICAL RESEARCH FOUNDATION		73-0580274
Par	t I Organizations Maintaining Donor Advi	sed Funds or Other Similar Fund	ls or Accounts.
	Complete if the organization answered "	Yes" on Form 990, Part IV, line 6.	
		(a) Donor advised 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 a		_
_	funds are the organization's property, subject to the	= = = = = = = = = = = = = = = = = = = =	
6	Did the organization inform all grantees, donors, are only for charitable purposes and not for the benefit		
	conferring impermissible private benefit?		
			· · · · · · · L Yes L No
Par			
	Complete if the organization answered "		
1	Purpose(s) of conservation easements held by the o		
	Preservation of land for public use (for example, recreations)	•	• •
	Protection of natural habitat	☐ Preservation o	f a certified historic structure
2	Preservation of open space Complete lines 2a through 2d if the organization hel	d a qualified conservation contribution	in the form of a conservation
_	easement on the last day of the tax year.	d a qualified conservation contribution	Held at the End of the Tax Year
_			
a b	Total acreage restricted by conservation easements		<del></del>
C	Number of conservation easements on a certified hi		
d	Number of conservation easements included in (c) a		
	• • • • • • • • • • • • • • • • • • • •		
3	Number of conservation easements modified, trans	ferred, released, extinguished, or tern	L L
	tax year	, , ,	, ,
4	Number of states where property subject to conserv	ation easement is located	
5	Does the organization have a written policy regard		
	violations, and enforcement of the conservation eas	ements it holds?	· · · · · · □ Yes □ No
6	Staff and volunteer hours devoted to monitoring, inspec	ting, handling of violations, and enforcing	g conservation easements during the year
_	<del></del>		
7	Amount of expenses incurred in monitoring, inspecting	g, handling of violations, and enforcing of	conservation easements during the year
8	Does each conservation easement reported on line 2	O(d) above satisfy the requirements of s	section 170(h)(4)(R)(i)
O	and section 170(h)(4)(B)(ii)?		
9	In Part XIII, describe how the organization report		
_	balance sheet, and include, if applicable, the text of		
	organization's accounting for conservation easemer	nts.	
Part	III Organizations Maintaining Collections	of Art, Historical Treasures, or	Other Similar Assets.
	Complete if the organization answered "		
1a	If the organization elected, as permitted under FAS	B ASC 958, not to report in its revenu	e statement and balance sheet works
	of art, historical treasures, or other similar assets	held for public exhibition, education,	, or research in furtherance of public
	service, provide in Part XIII the text of the footnote to	o its financial statements that describe	es these items.
b	If the organization elected, as permitted under FAS		
	art, historical treasures, or other similar assets held		search in furtherance of public service,
	provide the following amounts relating to these item		
	<ul><li>(i) Revenue included on Form 990, Part VIII, line 1</li><li>(ii) Assets included in Form 990, Part X</li></ul>		\$
_	(ii) Assets included in Form 990, Part X		· · · \$
2	If the organization received or held works of art,	historical treasures, or other similar	assets for financial gain, provide the
	following amounts required to be reported under FA	ASC 958 relating to these items:	
a	Revenue included on Form 990, Part VIII, line 1 . Assets included in Form 990, Part X		\$
b	Assets included in Form 990, Part X		\$

Schedule D (Form 990) 2022

Part	Organizations Maintaining	Collections of	Art, Historical 1	reasures, or 0	Other Similar Ass	sets (continued)
3	Using the organization's acquisition, collection items (check all that apply):	accession, and ot				
а	☐ Public exhibition		d 🗌 Loan	or exchange pro	gram	
b	☐ Scholarly research		e 🗌 Other			
С	☐ Preservation for future generations	3				
4	Provide a description of the organiza XIII.	tion's collections a	and explain how t	hey further the c	organization's exem	pt purpose in Part
5	During the year, did the organization assets to be sold to raise funds rather					r □ Yes □ No
Part			•			
	Complete if the organization 990, Part X, line 21.	n answered "Yes			•	
1a	Is the organization an agent, trustee included on Form 990, Part X?					t □ Yes □ No
b	If "Yes," explain the arrangement in P	art XIII and comple	ete the following to	able:		
					Ar	nount
С	Beginning balance				1c	
d	Additions during the year				1d	
е	Distributions during the year				1e	
f	Ending balance				1f	
2a	Did the organization include an amou				-	
b	If "Yes," explain the arrangement in P	art XIII. Check here	e if the explanatio	n has been provi	ded on Part XIII .	🗆
Par						
	Complete if the organization					
		(a) Current year	(b) Prior year	(c) Two years back	1 1 1	<del>                                     </del>
1a	Beginning of year balance	158,042,345	169,632,776	116,281,09		
b	Contributions	7,689,037	12,453,227	18,987,42	1 26,722	16,719,850
С	Net investment earnings, gains, and					
	losses	17,641,873	(18,843,658)	39,164,26		_
d	Grants or scholarships				0 0	0
е	Other expenditures for facilities and					
	programs	5,700,000	5,200,000	4,800,00		<del>                                     </del>
f	Administrative expenses				0 0	
g	End of year balance	177,673,255	158,042,345	169,632,77		115,938,978
2	Provide the estimated percentage of	-	· -	ı, column (a)) hel	d as:	
a	Board designated or quasi-endowme		%			
b	Permanent endowment 36.1	9 %				
С	Term endowment 29.27 %	0 1 11 14	222			
0-	The percentages on lines 2a, 2b, and					_
3a	Are there endowment funds not in thorganization by:	e possession of th	ie organization th	at are neid and a	administered for the	
	-					Yes No
	(i) Unrelated organizations					3a(i) 🗸
	( )					3a(ii)
b	If "Yes" on line 3a(ii), are the related of	•	•			3b
4 Part	Describe in Part XIII the intended use:  VI Land, Buildings, and Equipment		on s endowment i	unus.		
rait	Complete if the organization		" on Form 000 [	Part IV line 11a	Soo Form 000	Part Y line 10
	Description of property					
	Description of property	(a) Cost or ot (investment)	' '	ther)	depreciation	(d) Book value
	Land	_		4,080,847		4,080,847
b	Buildings		1	87,166,124	122,606,778	64,559,346
C	Leasehold improvements		<u> </u>	2.,.55,12.	,000,770	3 1,000,040
d	Equipment			49,786,418	34,195,965	15,590,453
e	Other			125,705	34,100,000	125,705
	Add lines 1a through 1e. (Column (d) r		90, Part X, columr			84,356,351

Schedule D (Form 990) 2022

Schedule D (Fo	orm 990) 2022			Page 3
Part VII	Investments – Other Securities.			•
	Complete if the organization answered "Yes" on For	m 990, Part IV, lin	e 11b. See Form	990, Part X, line 12.
	<ul><li>(a) Description of security or category (including name of security)</li></ul>	(b) Book value		hod of valuation: -of-year market value
(1) Financia	I derivatives			
(2) Closely I	neld equity interests			
(3) Other				
(A) OTHE	R SECURITES	30,261,701	END OF YEAR MA	RKET VALUE
(G) (H)				
	 mn (b) must equal Form 990, Part X, col. (B) line 12.)	30,261,701		
Part VIII	Investments – Program Related.	30,201,701		
T GIT VIII	Complete if the organization answered "Yes" on For	m 990. Part IV. lin	e 11c. See Form	990. Part X. line 13.
	(a) Description of investment	(b) Book value	(c) Met	hod of valuation: -of-year market value
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
	mn (b) must equal Form 990, Part X, col. (B) line 13.)			
Part IX	Other Assets.	000 D+ IV II-	- 44-l O F	000 David V. Brand F
	Complete if the organization answered "Yes" on For	m 990, Part IV, IIn	e 11a. See Form	
/4\ ELINDS	HELD IN TRUST BY OTHERS			(b) Book value
	AND BEQUESTS			145,885,933 23,726,140
	SURRENDER VALUE OF LIFE INSURANCE			6,097,175
	SSUE COSTS			79,852
(5) DEPOS				128,244
(6) ACCRU	ED INTEREST RECEIVABLE			39,388
(7) ASSETS	S HELD FOR SALE			47,970
(8) MINERA	ALS			117
(9)				
	mn (b) must equal Form 990, Part X, col. (B) line 15.)	<del></del>		176,004,819
Part X	Other Liabilities.			
	Complete if the organization answered "Yes" on For	m 990, Part IV, lin	e 11e or 11f. See	e Form 990, Part X,
4	line 25.			#ND 1 1
1. (1) Factorial in	(a) Description of liability			(b) Book value
(1) Federal in	ETIREMENT BENEFITS AND DEFERRED COMP			7,935,769
<del>(-)</del>	NTEREST AGREEMENTS			101,528
	TERM LEASE LIABILITY			849,215
(5)	-			5.5,210
(6)				
(7)				
(8)				
(9)				
	mn (b) must equal Form 990. Part X. col. (B) line 25.)			8.886.512

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII.

Schedule D (Form 990) 2022 Page **4** 

Part	-			Return.	,
	Complete if the organization answered "Yes" on Form 990, F		V, line 12a.		
1	Total revenue, gains, and other support per audited financial statements Amounts included on line 1 but not on Form 990, Part VIII, line 12:			1	128,895,162
2		۰.	10,000,040		
a	Net unrealized gains (losses) on investments	2a	12,396,046	-	
b	Donated services and use of facilities	2b			
С	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d	2,187,456		
е	Add lines 2a through 2d			2e	14,583,502
3	Subtract line <b>2e</b> from line <b>1</b>			3	114,311,660
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	0		
С	Add lines <b>4a</b> and <b>4b</b>			4c	0
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line	12.)		5	114,311,660
Part	XII Reconciliation of Expenses per Audited Financial Statem	ents	With Expenses pe	r Returi	n.
	Complete if the organization answered "Yes" on Form 990, I				
1	Total expenses and losses per audited financial statements	<b></b>	·,	1	108,085,497
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
	Donated services and use of facilities	2a			
a				-	
b	Prior year adjustments	2b		-	
C	Other losses	2c	_	-	
d	Other (Describe in Part XIII.)	2d	0		
е	Add lines 2a through 2d			2e	0
3	Subtract line <b>2e</b> from line <b>1</b>			3	108,085,497
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	0		
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	e 18.)		5	108,085,497
<b>Part</b>	XIII Supplemental Information.				
Provid	le the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and	d 4; P	art IV, lines 1b and 2b	; Part V, I	ine 4; Part X, line
2; Par	t XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part	to pro	ovide any additional ir	formation	١.
SEE S	TATEMENT				

## Part XIII

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.

Return Reference - Identifier	Explanation					
SCHEDULE D, PART XI, LINE	(a) Description	(b) Amount				
2(D) - OTHER REVENUES IN AUDITED FINANCIAL	CHANGES IN FAIR VALUE OF FUNDS HELD IN TRUST	2,094,607				
STATEMENTS NOT IN FORM	PENSION RELATED CHANGES OTHER THAN NET PERIODIC PENSION COSTS	92,849				
990						

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-		$^{\wedge}$	ш

**Supplemental Information.** 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.

Return Reference - Identifier	Explanation
SCHEDULE D, PART V, LINE 4 - INTENDED USES OF ENDOWMENT FUNDS	THE FOUNDATION'S ENDOWMENT CONSISTS OF INDIVIDUAL FUNDS ESTABLISHED TO PROVIDE THE FOUNDATION WITH FUNDING IN PERPETUITY.
SCHEDULE D, PART X, LINE 2 - FIN 48 (ASC 740) FOOTNOTE	THE FOUNDATION IS A PUBLIC FOUNDATION EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE EXCEPT FOR AMOUNTS RELATING TO UNRELATED BUSINESS INCOME. THERE WERE NO KNOWN MATERIAL UNRELATED BUSINESS INCOME TAXES INCURRED IN 2023 AND ACCORDINGLY, NO PROVISION FOR INCOME TAXES HAS BEEN MADE IN THESE FINANCIAL STATEMENTS.  MANAGEMENT HAS REVIEWED THE FOUNDATION'S TAX POSITION AND CONCLUDED THAT THERE ARE NO UNCERTAIN TAX POSITIONS THAT REQUIRE ACCRUAL IN THE CONSOLIDATED FINANCIAL STATEMENTS OR DISCLOSURE IN THE FOOTNOTES TO BE IN COMPLIANCE WITH AUTHORITATIVE LITERATURE. GENERALLY, THE FOUNDATION IS NO LONGER SUBJECT TO INCOME TAX EXAMINATION BY FEDERAL, STATE OR LOCAL TAX AUTHORITIES FOR YEARS PRIOR TO 2020. THE STATUTE OF LIMITATIONS WILL REMAIN OPEN FOR BOTH FEDERAL AND STATE PURPOSES FOR ANY RETURNS NOT FILED.

### **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.

20**22** Open to Public

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

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

Inspection

Name of the organization **Employer identification number** OKLAHOMA MEDICAL RESEARCH FOUNDATION 73-0580274 Part I General Information on Activities Outside the United States. Complete if the organization answered "Yes" on Form 990. Part IV. line 14b. For grantmakers. Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . . . . . . . . **☐ Yes** ☐ No 2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States. 3 Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.) (c) Number of (a) Region (b) Number (d) Activities conducted in the (e) If activity listed in (d) is (f) Total employees, expenditures for of offices in region (by type) (such as, a program service, agents, and the region fundraising, program services, describe specific type of and investments independent investments, grants to recipients service(s) in the region in the region contractors located in the region) in the region **EUROPE (INCLUDING** CONFERENCE TRAVEL **ICELAND AND GREENLAND)** 0 23 82,795 STUDENT PROGRAM **EUROPE (INCLUDING** PROGRAM SERVICES **ICELAND AND GREENLAND)** 0 15 21,172 NORTH AMERICA (CANADA & CONFERENCE TRAVEL MEXICO ONLY) 0 3 5.273 (3) INTELLECTUAL SOUTH ASIA PROGRAM SERVICES PROPERTY/RESEARCH 0 2 5.157 (4)COLLABORATION CENTRAL AMERICA AND THE INVESTMENTS **CARIBBEAN** 0 0 15,163,551 (5) SOUTH AMERICA CONFERENCE TRAVEL 0 1 1.640 EAST ASIA AND THE PACIFIC CONFERENCE TRAVEL 0 2 8.344 (7)NORTH AMERICA (CANADA & **INVESTMENTS** MEXICO ONLY) 0 0 2,015,968 (8) (9) (10) (11) (12)(13)(14)(15)(16)(17)17.303.900 0 46 Subtotal . . . . . 0 Total from continuation 0 sheets to Part I . . . .

0

46

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17,303,900

**Totals** (add lines 3a and 3b)

Schedule F (Form 990) 2022

Part II 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. (a) Name of (b) IRS code (c) Region (d) Purpose of (e) Amount of (f) Manner of (g) Amount of (h) Description (i) Method of section and EIN organization grant cash grant cash noncash of noncash assistance valuation (book, FMV, (if applicable) disbursement assistance appraisal, other) (1) (2) (3) (4) (5) (6) (7) (8)(9)(10)(11) (12)(13)(14)(15)(16)Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter 

Schedule F (Form 990) 2023
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Schedule F (Form 990) 2022

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.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of noncash assistance	(g) Description of noncash assistance	(h) Method of valuation (book, FMV, appraisal, other)
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							
(13)							
(14)							
(15)							
(16)							
(17)							
(18)							

Schedule F (Form 990) 2022 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	☐ 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	✓ 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	☑ 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	□ 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	☐ 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	✓ No

Schedule F (Form 990) 2022

## Part V

**Supplemental Information.** Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

Return Reference - Identifier	Explanation
3 - METHOD ÚSED TÓ ACCOUNT FOR EXPENDITURES ON ORG'S	CENTRAL AMERICA AND THE CARIBBEAN -ACCRUAL EAST ASIA AND THE PACIFIC -ACCRUAL EUROPE (INCLUDING ICELAND AND GREENLAND) -ACCRUAL NORTH AMERICA (CANADA & MEXICO ONLY) -ACCRUAL SOUTH AMERICA SOUTH ASIA -ACCRUAL

## SCHEDULE G (Form 990)

## **Supplemental Information Regarding Fundraising or Gaming Activities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

2022

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Name	of the organization					Employer identifi	cation number
OKLA	AHOMA MEDICAL RESEARCH FOUN	IDATION				73-	-0580274
Par	<b>Fundraising Activities.</b> Form 990-EZ filers are r				vered "Yes" on	Form 990, Part IV,	line 17.
1	Indicate whether the organization	on raised funds	through any	of the follo	owing activities. C	heck all that apply.	
а	☐ Mail solicitations		<b>e</b> [		ion of non-govern	-	
b	Internet and email solicitation	ns	f		ion of governmen	-	
С	Phone solicitations		g [	Special 1	fundraising events	3	
d	In-person solicitations						
2a	Did the organization have a writ	tten or oral agre	ement with	any individ	dual (including offi	cers, directors, trust	tees,
	or key employees listed in Form	n 990, Part VII) o	r entity in c	onnection \	with professional	fundraising services	?
b	If "Yes," list the 10 highest paid compensated at least \$5,000 by			draisers) pu	ursuant to agreem	nents under which th	ne fundraiser is to be
	(i) Name and address of individual or entity (fundraiser)	(ii) Activity	custody o	draiser have or control of outlons?	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
			Yes	No			
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
Total	1						
3	List all states in which the orgaregistration or licensing.	nization is regis	stered or lic	ensed to s	olicit contribution	s or has been notifi	ed it is exempt from

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

**Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		gross receipts greater tha	III \$5,000.			
			(a) Event #1 241 EVENT	(b) Event #2 MS DINNER	(c) Other events	(d) Total events (add col. (a) through
			(event type)	(event type)	(total number)	col. <b>(c)</b> )
Revenue	1	Gross receipts	478,900	356,555		835,455
Re	2		445,300	342,635		787,935
	3	Gross income (line 1 minus line 2)	33,600	13,920	0	47,520
	4	Cash prizes				0
	5	Noncash prizes				0
Direct Expenses	6	Rent/facility costs	7,728	2,050		9,778
	7	Food and beverages	23,312	21,227		44,539
	8	Entertainment	40,000	1,697		41,697
	9	Other direct expenses .	48,398	14,571		62,969
	10 11	Direct expense summary. Ad Net income summary. Subtra				158,983 (111,463)
Pa	rt II		e organization answe			or reported more than
Revenue			(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Rev	1	Gross revenue				
ses	2	Cash prizes				
Direct Expenses	3	Noncash prizes				
Direct	4	Rent/facility costs				
	5	Other direct expenses .				
	6	Volunteer labor	<ul><li>☐ Yes %</li><li>☐ No</li></ul>	☐ Yes % ☐ No	☐ Yes % ☐ No	
	7	Direct expense summary. Ad				
	8	Net gaming income summary	y. Subtract line 7 from li	ne 1, column (d)		
		Enter the state(s) in which the or is the organization licensed to co				
10		Were any of the organization's g If "Yes," explain:	aming licenses revoked	l, suspended, or termina		? .

Schedu	ule G (Form 990) 2022		Page <b>3</b>
11	Does the organization conduct gaming activities with nonmembers?	☐ Yes	☐ No
12	Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?		□ No
13	Indicate the percentage of gaming activity conducted in:	1	
a	The organization's facility		<u>%</u>
. b	An outside facility		%_
14	Enter the name and address of the person who prepares the organization's gaming/special events books and records:	1	
	Name		
	Address		
15a	revenue?		☐ No
b	If "Yes," enter the amount of gaming revenue received by the organization \$ and the		
	amount of gaming revenue retained by the third party \$		
С	If "Yes," enter name and address of the third party:		
	Name		
	Address		
16	Gaming manager information:		
	Name		
	Gaming manager compensation \$		
	Description of services provided		
	□ Director/officer □ Employee □ Independent contractor		
17	Mandatory distributions:		
а	Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?		☐ No
b	Enter the amount of distributions required under state law to be distributed to other exempt organizations of spent in the organization's own exempt activities during the tax year	r	
Part	Supplemental Information. Provide the explanations required by Part I, line 2b, columns Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional See instructions.	(iii) and ( onal infor	v); and mation.

Schedule G (Form 990) 2022

### **SCHEDULE J** (Form 990)

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

Department of the Treasury Internal Revenue Service Name of the organization

OKLAHOMA MEDICAL RESEARCH FOUNDATION

Employer identification number

73-0580274

Part	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	V	
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.			
	✓ Compensation committee			
	<ul><li>✓ Independent compensation consultant</li><li>✓ Compensation survey or study</li></ul>			
	Form 990 of other organizations  Approval by the board or compensation committee			
4	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:			
а	Receive a severance payment or change-of-control payment?	4a		~
b	Participate in or receive payment from a supplemental nonqualified retirement plan?	4b	~	
С	Participate in or receive payment from an equity-based compensation arrangement?	4c		~
	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		~
b	Any related organization?	5b		~
	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		~
b	Any related organization?	6b		~
	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	~	
8	Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject	<b>–</b>		
•	to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe			
	in Part III	8		~
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in			
	Regulations section 53.4958-6(c)?	9		

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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.

		(B) Breakdown of W-2 ar	nd/or 1099-MISC and/or	099-NEC compensation	(C) Retirement and	(D) Nentavable	(F) Total of calumana	(F) Compensation
(A) Name and Title		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	other deferred compensation	( <b>D</b> ) Nontaxable benefits	(E) Total of columns (B)(i)–(D)	in column (B) reported as deferred on prior Form 990
ANDREW WEYRICH, PHD	(i)	594,260	28,247	50,205	64,996	20,300	758,008	0
1 PRESIDENT AND CEO	(ii)	0	0	0	0	0	0	0
JUDITH JAMES	(i)	426,848	0	49,109	92,424	12,018	580,399	0
$oldsymbol{2}$ VP OF CLINICAL AFFAIRS AND PROGRAM CHAIR	(ii)	0	0	0	0	0	0	0
GABRIEL PARDO , MD	(i)	365,404	100	3,232	34,433	20,223	423,392	0
3 ASSOCIATE PROFESSOR, ARTHRITIS AND CLINICAL	(ii)	0	0	0	0	0	0	0
ADAM COHEN	(i)	291,163	26,000	23,252	45,666	11,653	397,734	0
4 SR VP AND GENERAL COUNSEL	(ii)	0	0	0	0	0	0	0
RODGER MCEVER , MD	(i)	301,226	0	47,994	32,522	13,210	394,952	0
5 VP OF RESEARCH	(ii)	0	0	0	0	0	0	0
LIJUN XIA , MD	(i)	252,710	0	49,520	60,795	11,963	374,988	0
6 PROGRAM CHAIR, CARDIOVASCULAR BIOLOGY	(ii)	0	0	0	0	0	0	0
PATRICK GAFFNEY , MD	(i)	294,568	0	15,784	42,635	20,223	373,210	0
7 PROGRAM CHAIR, GENES AND HUMAN DISEASE	(ii)	0	0	0	0	0	0	0
SWAPAN NATH , PHD	(i)	267,660	0	41,436	32,721	20,863	362,680	0
8 PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY	(ii)	0	0	0	0	0	0	0
FLOREA LUPU, PHD	(i)	297,067	150	23,100	33,406	7,502	361,225	0
9 PROFESSOR, CARDIOVASCULAR BIOLOGY	(ii)	0	0	0	0	0	0	0
TIM HASSEN	(i)	254,938	75	27,272	45,306	21,323	348,914	0
10 VP AND CFO	(ii)	0	0	0	0	0	0	0
PENNY VOSS	(i)	224,743	0	21,784	50,272	13,507	310,306	0
11 VP OF PHILANTHROPY	(ii)	0	0	0	0	0	0	0
BERKLEY CHELSEA, MD	(i)	248,428	20,000	832	26,350	6,755	302,365	0
12 CLINICAL ASSISTANT PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY	(ii)	0	0	0	0	0	0	0
ALIREZA REZAIE, PHD	(i)	202,869	0	47,358	27,571	13,850	291,648	0
13 PROFESSOR, CARDIOVASCULAR BIOLOGY	(ii)	0	0	0	0	0	0	0
MERRILL JOAN, MD	(i)	229,175	150	23,281	26,110	1,352	280,068	0
14 PROFESSOR, ARTHRITIS AND CLINICAL IMMUNOLOGY	(ii)	0	0	0	0	0	0	0
COURTNEY GRIFFIN , PHD	(i)	207,033	0	11,760	28,145	12,014	258,952	0
15 VP OF RESEARCH (TRAINING)	(ii)	0	0	0	0	0	0	0
(SEE STATEMENT)	(i)							
16	(ii)							

Schedule J (Form 990) 2022

Part II

Officers, Directors, Trustees, Key Employees and Highest Compensated Employees (continued)

(a)			(b)		(c)	(d)	(e)	(f)
Name		Breakdown of W	-2 and/or 1099-MIS	C compensation	Retirement and	Nontaxable	Total of columns	Compensation
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	other deferred compensation	benefits	(b)(i)-(d)	reported in prior Form 990 or Form 990-EZ
(16) COURTNEY GREENWOOD	(i)	195,238	0	4,540	24,555	20,863	245,196	0
VP OF HUMAN RESOURCES	(ii)	0	0	0	0	0	0	0
(17) LISA DAY	(i)	174,707	150	3,899	20,241	11,378	210,375	0
VP OF GOVERNMENT AFFAIRS	(ii)	0	0	0	0	0	0	0
(18) BENJAMIN MILLER, PHD	(i)	160,383	5,000	1,919	14,693	7,912	189,907	0
PROGRAM CHAIR, AGING AND METABOLISM	(ii)	0	0	0	0	0	0	0

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**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 this part for any additional information.

Return Reference - Identifier	Explanation
SCHEDULE J, PART I, LINE 1A - FIRST-CLASS OR CHARTER TRAVEL	FIRST CLASS TRAVEL IS ALLOWED FOR THE CEO TO ALLOW HIM TO ACCOMPLISH WORK RELATED TO TASKS WHILE TRAVELING.
SCHEDULE J, PART I, LINE 1A - TRAVEL FOR COMPANIONS	TRAVEL FOR COMPANIONS IS ALLOWED IN CERTAIN LIMITED CIRCUMSTANCES WHERE THE COMPANION'S PRESENCE HAS A BENEFIT TO THE FOUNDATION BUT DOES NOT QUALIFY AS A BUSINESS EXPENSE UNDER IRS RULES. IN THOSE LIMITED CASES THE COMPANION'S TRAVEL EXPENSES ARE TREATED AS TAXABLE COMPENSATION.
SCHEDULE J, PART I, LINE 1A - TAX INDEMNIFICATION AND GROSS-UP PAYMENTS	THE FOUNDATION'S POLICY IS TO PROVIDE GROSS-UP PAYMENTS FOR ALL EMPLOYEE RELOCATION EXPENSES. DURING 2022, THE PRESIDENT RELOCATED TO OKLAHOMA.
SCHEDULE J, PART I, LINE 1A - HOUSING ALLOWANCE OR RESIDENCE FOR PERSONAL USE	THE PRESIDENT USED THE FOUNDATION OWNED CONDO FOR APPROXIMATELY 3 MONTHS WHILE RELOCATING. THE ESTIMATED MARKET VALUE OF RENT PLUS UTILITIES WAS INCLUDED IN HIS TAXABLE COMPENSATION.
SCHEDULE J, PART I, LINE 4B - SUPPLEMENTAL NONQUALIFIED RETIREMENT PLAN	THE BOARD OF THE FOUNDATION PERIODICALLY USES NON-QUALIFIED RETIREMENT PLANS AS A RETENTION TOOL. THE AMOUNT REPORTED IS THE AMOUNT VESTED IN THE 457(F) PLAN. THE REMAINING AMOUNT OF THE PLAN IS NOT VESTED AND IS SUBJECT TO SUBSTANTIAL RISK OF FORFEITURE.
SCHEDULE J, PART I, LINE 7 - NON-FIXED PAYMENTS	THE PRESIDENT RECEIVES AN ANNUAL BONUS THAT IS DETERMINED BY LEADERSHIP OF THE BOARD OF DIRECTORS BASED ON PERFORMANCE. THE BONUS IS CONSIDERED AS A PORTION OF TOTAL COMPENSATION AND IS SUBJECT TO THE REVIEW PROCESS PREVIOUSLY DESCRIBED.
SCHEDULE J, PART I, LINE 3 -	COMPENSATION FOR THE CEO IS DETERMINED BY LEADERSHIP OF THE BOARD OF DIRECTORS BASED ON COMPARABILITY DATA FROM WIDELY ACCEPTED PEER BENCHMARKING SURVEYS THAT ARE SEGMENTED BY REGION AND SIZE OF ENTITY.

## SCHEDULE K (Form 990)

## **Supplemental Information on Tax-Exempt Bonds**

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Part VI.

Attach to Form 990.

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Name of the organization **Employer identification number** OKLAHOMA MEDICAL RESEARCH FOUNDATION 73-0580274 **Bond Issues** (i) Pooled financing (b) Issuer EIN (c) CUSIP # (d) Date issued (g) Defeased (a) Issuer name (e) Issue price (f) Description of purpose behalf of issuer OKLAHOMA INDUSTRIES AUTHORITY REVENUE **REFUNDING OF PRIOR YEAR 2008** Yes No Yes No Yes No 29,535,000 73-6194355 000000000 07/13/2016 BONDS (OMRF PROJECT) SERIES 2016 **BOND** В C D Part II **Proceeds** C В D 18.600.000 Amount of bonds legally defeased . . . . . . . . . . . . . . . . . . 3 29.535.000 2.953.564 5 26,315,325 7 266,175 8 9 0 10 11 12 0 13 2016 Yes No Yes Yes Nο Yes Nο Nο Were the bonds issued as part of a refunding issue of tax-exempt bonds (or, if issued prior to 2018, a current refunding issue)? . . . . . . . . . . . . . . Were the bonds issued as part of a refunding issue of taxable bonds (or, if V 16 ~ 17 Does the organization maintain adequate books and records to support the final allocation of proceeds? . . . . . . . . . . . . . . . . .

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

Cat. No. 50193E

Schedule K (Form 990) 2022

Schedule K (Form 990) 2022

#### Part III **Private Business Use** В C D Α Was the organization a partner in a partnership, or a member of an LLC, Yes No Yes No Nο Yes Yes No which owned property financed by tax-exempt bonds? . . . . . . . . . v Are there any lease arrangements that may result in private business use of ~ 3a Are there any management or service contracts that may result in private V **b** If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property? c Are there any research agreements that may result in private business use of ~ d If "Yes" to line 3c, does the organization routinely engage bond counsel or other ~ outside counsel to review any research agreements relating to the financed property? Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government . . . . 0.00 % % Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government . . . . . 0.00 % % 0.00 % % Does the bond issue meet the private security or payment test? . . . . . ~ **8a** Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued? **b** If "Yes" to line 8a, enter the percentage of bond-financed property sold or % c If "Yes" to line 8a, was any remedial action taken pursuant to Regulations Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the ~ requirements under Regulations sections 1.141-12 and 1.145-2? . . . . Part IV Arbitrage C Α В D Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Yes Nο Yes Nο Yes Nο Yes Nο ~ 2 If "No" to line 1, did the following apply? V If "Yes" to line 2c, provide in Part VI the date the rebate computation was 07/01/2021

Schedule K (Form 990) 2022

Schedule K (Form 990) 2022

Part	IV Arbitrage (continued)								•	
			Α		В		С		D	
4a	Has the organization or the governmental issuer entered into a qualified	Yes	No	Yes	No	Yes	No	Yes	No	
	hedge with respect to the bond issue?		~							
b	Name of provider		•		•					
С	Term of hedge									
d	Was the hedge superintegrated?									
е	Was the hedge terminated?									
5a	Were gross proceeds invested in a guaranteed investment contract (GIC)? .		~							
b	Name of provider									
С	Term of GIC									
d	Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?									
6	Were any gross proceeds invested beyond an available temporary period? .		~							
7	Has the organization established written procedures to monitor the									
	requirements of section 148?	<b>~</b>								
Part	V Procedures To Undertake Corrective Action									
			A	I	В				D	
	Has the organization established written procedures to ensure that violations	Yes	No	Yes	No	Yes	No	Yes	No	
	of federal tax requirements are timely identified and corrected through the									
	voluntary closing agreement program if self-remediation isn't available under									
	applicable regulations?	>								
Part	VI Supplemental Information. Provide additional information for responsible to the supplemental Information.	ponses to	questions	on Schedu	lle K. See i	nstructions				
(SEE	STATEMENT)									

Pa	rt	V
----	----	---

**Supplemental Information.** Supplemental Information Complete this part to provide additional information for responses to questions on Schedule K (see instructions).

Return Reference - Identifier	Explanation
07/13/2016 29535000 OKLAHOMA INDUSTRIES AUTHORITY	IN JULY 2016, THE FOUNDATION ENTERED INTO ADVANCED REFINANCING OF THE SERIES 2008 BONDS. THE FOUNDATION ISSUED \$43,955,000 OF OIA SERIES 2008 REVENUE BONDS (THE "SERIES 2008 BONDS") DATED JULY 1, 2008; THE PROCEEDS FROM THIS BOND WERE USED TO CONSTRUCT AND EQUIP A NEW RESEARCH FACILITY. THE SERIES 2008 BONDS WERE DEFEASED WHEN THE FOUNDATION ISSUED \$29,535,000 OF OIA SERIES 2016 REVENUE BONDS (THE "SERIES 2016 BONDS") DATED JULY 13, 2016. THE SERIES 2016 BONDS MATURE ON JULY 1, 2026 AND BEAR INTEREST AT THE STATED RATE OF 1.81% PER ANNUM. PAYMENTS OF PRINCIPAL AND INTEREST BEGAN JANUARY 1, 2017 AND ARE DUE JANUARY 1ST AND JULY 1ST OF EACH YEAR. THE SERIES 2016 BOND AGREEMENTS ALSO REQUIRE MAINTENANCE OF A RESERVE FUND WHICH IS INCLUDED IN INVESTMENTS IN THE ACCOMPANYING STATEMENT OF FINANCIAL POSITION. THIS AMOUNT WAS \$2,953,500 AS OF JUNE 30, 2023.
SCHEDULE K, PART IV, LINE 2C - COLUMN A	ISSUER NAME: OKLAHOMA INDUSTRIES AUTHORITY REVENUE BONDS (OMRF PROJECT) SERIES 2016 THE CALCULATION FOR COMPUTING NO REBATE DUE WAS PERFORMED ON 07/01/2021

## SCHEDULE M (Form 990)

## **Noncash Contributions**

OMB No. 1545-0047

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Name of the organization

OKLAHOMA MEDICAL RESEARCH FOUNDATION

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

Employer identification number 73-0580274

Part	Types of Property							
		(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	Method o			
1 2 3 4 5	Art—Works of art			10111 000, 1 011 111, 1110 19				
6 7 8 9	goods		10	408 485	MARKET VA	IUE		
10 11	Securities – Closely held stock . Securities – Partnership, LLC, or trust interests			133,133				
12 13	Securities—Miscellaneous Qualified conservation contribution—Historic structures							
14	Qualified conservation contribution—Other							
15 16 17	Real estate—Residential Real estate—Commercial Real estate—Other							
18 19 20	Collectibles							
21 22	Taxidermy							
23 24 25	Scientific specimens Archeological artifacts Other ()							
26 27 28	Other () Other ()							
29	Number of Forms 8283 received which the organization completed				29	0	Yes	No
30a	During the year, did the organiza 28, that it must hold for at least 3 used for exempt purposes for the	years from	the date of the initial contri		uired to be	30a	res	NO V
b 31	If "Yes," describe the arrangement Does the organization have a contributions?		otance policy that require	es the review of any no	onstandard 	31	~	
32a							_	
33	<b>b</b> If "Yes," describe in Part II.							

## Part II

**Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Return Reference - Identifier	Explanation
USED TO SOLICIT,	THE FOUNDATION CONTRACTS WITH A SERVICE ORGANIZATION WHO SOLICITS THE DONATION OF VEHICLES. THE SERVICE ORGANIZATION IS RESPONSIBLE FOR COMMUNICATION WITH THE DONOR AS WELL AS THE SELLING PROCESS. THE FOUNDATION RECEIVES A CHECK FOR 80% OF THE PROCEEDS FROM THE SALE OF THE VEHICLE.

## **SCHEDULE O** (Form 990)

Department of 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 990-EZ.

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

OMB No. 1545-0047 Open to Public Inspection

Name of the Organization OKLAHOMA MEDICAL RESEARCH FOUNDATION

Employer Identification Number 73-0580274

Return Reference - Identifier	Explanation	
FORM 990, PART III, LINE 4D - DESCRIPTION OF OTHER	(EXPENSES \$43,293,925 INCLUDING GRANTS OF )(REVENUE \$35,305,207)	
PROGRAM SERVICES	OTHER PROGRAM SERVICES INCLUDE DEPARTMENTS SUCH AS CELL CYCLE AN BIOLOGY, GENES AND HUMAN DISEASE, GENETIC MODELS OF DISEASE AND OT AND RESEARCH SUPPORT SERVICES.	
FORM 990, PART VI - SECTION A, LINE 2	THE FOUNDATION CURRENTLY HAS 62 DIRECTORS, MANY OF WHOM ARE BUSIN MEMBERS OF PROMINENT FAMILIES IN THE STATE OF OKLAHOMA. THE FOUNDATHERE ARE MULTIPLE BUSINESS RELATIONSHIPS BETWEEN AND AMONG BOAR FAMILIES OF BOARD MEMBERS, BUT THE FOUNDATION REVIEW OF SIGNED CONDISCLOSURES FROM ALL BOARD MEMBERS AND OF THE FOUNDATION'S LEDGE INDICATED THERE ARE NO SUCH RELATIONSHIPS THAT WOULD IMPAIR THE FID ANY DIRECTOR TO THE FOUNDATION.	ATION BELIEVES D MEMBERS AND IFLICT OF INTEREST R ACCOUNTS
FORM 990, PART VI, LINE 1A - DELEGATE BROAD AUTHORITY TO A COMMITTEE	THE FOUNDATION'S BOARD OF DIRECTORS HAS DELEGATED ALL OF ITS POWER FOUNDATION'S EXECUTIVE COMMITTEE, EXCEPT AS FOLLOWS: ESTABLISH THE AND DIRECTION OF THE FOUNDATION, APPOINT THE MEMBERS OF THE EXECUT ELECT AND REMOVE THE CHAIR OF THE BOARD OF DIRECTORS, AMEND THE BY CERTIFICATE OF INCORPORATION OF THE FOUNDATION, AND APPOINT SPECIAL THE BOARD OF DIRECTORS. THE BOARD OF DIRECTORS MAY AT ANY TIME AME THIS DELEGATION OF POWERS.	OVERALL POLICIES TIVE COMMITTEE, /LAWS AND THE L COMMITTEES TO
FORM 990, PART VI, LINE 11B - REVIEW OF FORM 990 BY GOVERNING BODY	THE FORM 990 IS PREPARED BY THE FOUNDATION, INTERNALLY REVIEWED BY 990-T IS EXTERNALLY REVIEWED BY THE TAX DEPARTMENT OF A PUBLIC ACCOL SUMMARY OF THE FORM 990 IS PRESENTED FOR REVIEW TO THE EXECUTIVE C SUBSEQUENT TO THAT REVIEW, THE FORM 990 WITH ALL SUPPLEMENTAL SCHE AVAILABLE TO ALL MEMBERS OF THE BOARD OF DIRECTORS FOR REVIEW AND TO FILING.	UNTING FIRM. A OMMITTEE. EDULES IS MADE
FORM 990, PART VI, LINE 12C - CONFLICT OF INTEREST POLICY	EACH DIRECTOR, OFFICER AND KEY EMPLOYEE IS ANNUALLY PROVIDED WITH A FOUNDATION'S CONFLICT OF INTEREST POLICY. EACH OF THESE INDIVIDUALS I PROVIDED WITH A QUESTIONNAIRE REGARDING POTENTIAL CONFLICTS AND REDISCLOSE ANY POTENTIAL CONFLICT THAT HE OR SHE MIGHT HAVE. IN ADDITION INDIVIDUALS MUST ANNUALLY SIGN A STATEMENT AFFIRMING THAT HE OR SHE COPY OF THE CONFLICTS OF INTEREST POLICY, READ AND UNDERSTOOD THE AGREES TO COMPLY WITH THE POLICY. ONCE THE FOUNDATION HAS COLLECT DISCLOSURE STATEMENTS FROM ALL DIRECTORS, OFFICER AND KEY EMPLOYE FOUNDATION'S GOVERNANCE COMMITTEE REVIEWS SUCH INFORMATION TO ID IN WHICH A POTENTIAL CONFLICT EXISTS AND IS MATERIAL. IF A POTENTIAL MAIS IDENTIFIED, THE COMMITTEE ANALYZES WHETHER THE CONTEMPLATED TRAUTHORIZED AS JUST, FAIR, AND REASONABLE TO THE FOUNDATION. THE GOV COMMITTEE THEN MAKES A RECOMMENDATION TO THE FOUNDATIONS' EXECUTEGARDING THE MANAGEMENT OF ALL POTENTIAL CONFLICTS IT HAS IDENTIFIED DECISION AS TO THE APPROVAL AND, WHERE APPLICABLE, MANAGEMENT OF A POTENTIAL CONFLICTS RESTS IN THE SOLE DISCRETION OF THE EXECUTIVE COMMITTEE ARE OF THE FOUNDATION AND ADVANCEMENT OF ITS PURPOSE. THE RECOMMENDATIONS OF THE GOVERNAN AND DECISIONS OF THE EXECUTIVE COMMITTEE ARE DOCUMENTED IN THE RESOFT THESE COMMITTEES' REGULAR MEETINGS.	S ANNUALLY EQUIRED TO IN, EACH OF THESE HAS; RECEIVED A POLICY AND ED ANNUAL EES, THE ENTIFY SITUATIONS ITERIAL CONFLICT INSACTION MAY BE ERNANCE FIVE COMMITTEE ED. THE FINAL ALL SUCH DMMITTEE, WHICH D THE ICE COMMITTEE
FORM 990, PART VI, LINE 15A - PROCESS TO ESTABLISH COMPENSATION OF TOP MANAGEMENT OFFICIAL	COMPENSATION FOR OFFICERS AND KEY EMPLOYEES IS DETERMINED AND EVACENCH YEAR BY THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS BASE COMPARABILITY DATA FROM WIDELY ACCEPTED PEER BENCH MARKING SALAR ARE SEGMENTED BY REGION AND SIZE OF ENTITY.	SED ON
FORM 990, PART VI, LINE 15B - PROCESS TO ESTABLISH COMPENSATION OF OTHER OFFICERS OR KEY EMPLOYEES	COMPENSATION FOR OFFICERS AND KEY EMPLOYEES IS DETERMINED AND EVERACH YEAR BY THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS BASE COMPARABILITY DATA FROM WIDELY ACCEPTED PEER BENCH MARKING SALAR ARE SEGMENTED BY REGION AND SIZE OF ENTITY.	SED ON
FORM 990, PART VI, LINE 18 - HOW FORMS ARE MADE AVAILABLE TO THE PUBLIC	THE FOUNDATION'S FORM 990 FOR THE LAST THREE YEARS ARE PUBLICLY AVA FOUNDATION'S WEBSITE, AS WELL AS ON GUIDESTAR AND OTHER NONPROFIT 1023, 990, AND 990-T ARE PROVIDED UPON REQUEST.	
FORM 990, PART VI, LINE 19 - REQUIRED DOCUMENTS AVAILABLE TO THE PUBLIC	THE FOUNDATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY STATEMENTS ARE PROVIDED UPON REQUEST AND ARE PUBLICLY AVAILABLE O FOUNDATION'S WEBSITE.	
FORM 990, PART XI, LINE 9 -	(a) Description	(b) Amount
OTHER CHANGES IN NET ASSETS OR FUND BALANCES	CHANGES IN FAIR VALUE OF FUNDS HELD IN TRUST	2,094,607
	PENSION RELATED CHANGES OTHER THAN NET PERIODIC PENSION COSTS	92,849

Return Reference - Identifier	Explanation
SCHEDULE F, PART I, LINE 3 -	PROGRAM SERVICE ACTIVITY IN ALL REGIONS INCLUDES SCIENTISTS ATTENDING AND/OR SPEAKING AT SCIENTIFIC CONFERENCES AND COLLABORATIONS.  OMRF DOES NOT MAINTAIN ONGOING OPERATIONS IN FOREIGN JURISDICTIONS HOWEVER THE FOUNDATION'S SCIENTISTS DO TRAVEL TO VARIOUS SCIENTIFIC CONFERENCES IN OTHER COUNTRIES TO SHARE IN SCIENTIFIC DISCOVERIES, AS WELL AS, TO LEARN FROM OTHER SCIENTISTS ACROSS THE WORLD.

## **SCHEDULE R** (Form 990)

Part II

## **Related Organizations and Unrelated Partnerships**

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37. Attach to Form 990. Go to www.irs.gov/Form990 for instructions and the latest information.

**Open to Public** Inspection

Name of the organization

OKLAHOMA MEDICAL RESEARCH FOUNDATION

**Employer identification number** 73-0580274

(a) Name, address, and EIN (if applicable) of disregarded entity	<b>(b)</b> Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	<b>(e)</b> End-of-year assets	(f) Direct controlling entity
(1) CULBERTSON PLAZA LLC (84-2527142) 825 NE 13TH STREET, OKLAHOMA CITY, OK 73104	MANAGE REAL PROPERTY KNOWN AS THE CULBERTSON PLAZA SHOPPING CENTER	OK	122,511	1,382,296	OKLAHOMA MEDICAL RESEARCH FOUNDATION
(2)					
(3)	-				
(4)	-				
(5)					
(6)	-				

**(g)** Section 512(b)(13) Name, address, and EIN of related organization Public charity status Direct controlling Primary activity Legal domicile (state Exempt Code section or foreign country) (if section 501(c)(3)) controlled entity entity? Yes No (4)

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

one or more related tax-exempt organizations during the tax year.

Schedule R (Form 990) 2022

Cat. No. 50135Y

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Part III 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) Name, address, and EIN of related organization	<b>(b)</b> Primary activity	(c) Legal domicile (state or foreign	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from	(f) Share of total income	re of total Share of end-of-		n) ortionate tions?	(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	Gene man	i) eral or aging ner?	(k) Percentage ownership
		country)		tax under sections 512-514)			Yes	No	, ,	Yes No		
(1)												
(2)												
(3)												
(4)												
(5)												
(6)												
(7)												

Part IV 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> Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	Section 5 contr ent	i) 512(b)(13) rolled ity?
								Yes	No
_(1)									
(2)									
(3)									
(4)									
(5)									
(6)									
(7)									

Schedule R (Form 990) 2022

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

Not	te: 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 with one or n				_											
а	Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity													1a		
b	Gift, grant, or capital contribution to related organization(s)													1b		
С	Gift, grant, or capital contribution from related organization(s)													1c		
d	Loans or loan guarantees to or for related organization(s)													1d		
е	Loans or loan guarantees by related organization(s)													1e		
f	Dividends from related organization(s)													1f		
g	Sale of assets to related organization(s)													1g		
h	Purchase of assets from related organization(s)													1h		
i	Exchange of assets with related organization(s)													1i		
j	Lease of facilities, equipment, or other assets to related organization(s)													1j		
•																
k	Lease of facilities, equipment, or other assets from related organization(s)													1k		
- 1	Performance of services or membership or fundraising solicitations for related organization(s).													11		
m														1m		
n														1n		
0														10		
	3 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -															
р	Reimbursement paid to related organization(s) for expenses													1p		
q														1g		
-														1		
r	Other transfer of cash or property to related organization(s)													1r		
s														1s		
2	If the answer to any of the above is "Yes," see the instructions for information on who must comp														eshol	
•	(a)		(b		, -	Ī	<u> </u>	(c)					(d)			
	Name of related organization	T		action			Amo	ount ir	ed	Met	hod c	of det	erminin	g amou	nt invol	ved
		t	ype (a	a—s)												
(1)																
(2)																
(3)																
(4)																
(5)																
(6)																

Page **4** 

## 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) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under	organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
			sections 512-514)	Yes	No			Yes	No		Yes	No	
(1)													
(2)													
(3)													
<u>(4)</u>													
(5)													
<u>(6)</u>													
(7)													
(8)													
(9)													
(10)													
(11)													
(12)													
(13)													
(14)													
(15)													
(16)													

## Form **8868**

(Rev. January 2022)

Department of the Treasury Internal Revenue Service

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

► File a separate application for each return.

► Go to www.irs.gov/Form8868 for the latest information.

OMB No. 1545-0047

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. Taxpayer identification number (TIN) Name of exempt organization or other filer, see instructions. Type or 73-0580274 OKLAHOMA MEDICAL RESEARCH FOUNDATION print Number, street, and room or suite no. If a P.O. box, see instructions. File by the due date for 825 NE 13TH STREET filing your City, town or post office, state, and ZIP code. For a foreign address, see instructions. return. See OKLAHOMA CITY, OK 73104 instructions. **Application** Application Return Return Code Code Is For ls For Form 990 or Form 990-EZ 01 Form 1041-A 80 Form 4720 (individual) 03 Form 4720 (other than individual) 09 Form 990-PF Form 5227 04 10 Form 990-T (sec. 401(a) or 408(a) trust) 05 Form 6069 11 Form 8870 Form 990-T (trust other than above) 06 12 Form 990-T (corporation) 07 • The books are in the care of ▶ TIM HASSEN, VP AND CHIEF FINANCIAL OFFICER, 825 NE 13TH STREET, OKLAHOMA CITY, OK 73104 Telephone No. ► (405) 271-7421 Fax No. ► (405) 271-7119 • If the organization does not have an office or place of business in the United States, check this box . . . . . . . . . . . . . . . . . • If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box . . . ▶ □ . If it is for part of the group, check this box . . . . ▶ □ and attach a list with the names and TINs of all members the extension is for. the organization named above. The extension is for the organization's return for: ► ☐ calendar year 20 or  $\blacktriangleright$  tax year beginning 07/01 , 20 22 , and ending 06/30 , 20 23 . If the tax year entered in line 1 is for less than 12 months, check reason:  $\Box$  Initial return  $\Box$  Final return ☐ Change in accounting period If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any

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 instructions.

b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and

c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by

estimated tax payments made. Include any prior year overpayment allowed as a credit.

using EFTPS (Electronic Federal Tax Payment System). See instructions.

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

nonrefundable credits. See instructions.

Cat. No. 27916D

Form **8868** (Rev. 1-2022)

3a \$

3b \$

3c \$