

Tennessee Secretary of State
Tre Hargett



Division of Business and Charitable Organizations
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243-1102

August 02, 2023

Mr. FERNANDO SALAZAR
7272 GREENVILLE AVENUE
DALLAS, TX 75231

RE: Registration to Solicit Funds for Charitable Purposes
Organization Name: AMERICAN HEART ASSOCIATION, INC.
CO Number: CO3209
Renewal Date: 12/31/2023

Dear Mr. FERNANDO SALAZAR :

Pursuant to the Tennessee Charitable Solicitations Act, T.C.A. § 48-101-501, *et seq.* the Tennessee Secretary of State has reviewed your application and is pleased to announce your organization's registration to solicit contributions has been **approved**.

The organization must maintain statutory compliance by submitting a renewal application and required fees on an annual basis. At that time you may be required to submit tax filings, financial statements, proof of IRS status, and other documents related to your organization and its fundraising activities. You can find additional information and submit additional filings online at <https://sos.tn.gov/charities>. The "CO" Number listed above will serve as your organization's charitable registration number and should be used when submitting any charitable filings or correspondence.

Please also be advised that if the organization's application or other provided information includes false, misleading or deceptive statements, appropriate action will be taken. Pursuant to the Tennessee Charitable Solicitations Act, a civil penalty of up to five thousand dollars (\$5,000.00) may be assessed for any violation.

Thank you for registering your organization and please do not hesitate to contact us with any questions.

Sincerely,

Tre Hargett
Secretary of State

Tracking Number
2023123511

Application to Renew Registration of a Charitable Organization



Tre Hargett
Secretary of State

Division of Business and Charitable Organizations

Department of State

State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2555
Fax: 615-253-5173
sos.tn.gov/charities

CO Number: CO3209
Filed: 08/02/2023 02:28 PM
Tre Hargett
Secretary of State

Organization Information

Legal Name of the Charitable Organization: AMERICAN HEART ASSOCIATION, INC.

Legal entity type of the Organization: Corporation

Business Services Control Number: 000356971

FEIN: 13-5613797

Initial Registration Date: 01/01/1997

Renewal Date: 03/31/2023

Has your fiscal year ending month changed since your last renewal?

☐ Yes ☒ No

Fiscal Year Ending Month: June

When and where was the organization legally established

Date: 05/23/1924

Country: USA

City/State: NEW YORK, NY

Has your Principal Office address changed since your last renewal?

☐ Yes ☒ No

Principal Office Address

7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129

Has your Mailing address changed since your last renewal?

☐ Yes ☒ No

Mailing Office Address

7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231

Contact Information for the Charitable Organization

Contact Name: Mr. FERNANDO SALAZAR

Telephone Number: (214) 706-1566

Fax Number: (214) 706-5273

Email: taxdept@heart.org

Website: http://www.heart.org

Current names used by the charity organization

AMERICAN STROKE ASSOCIATION, INC.

Do you need to modify other names that the charity solicits under?

☐ Yes ☒ No

Has the organization registered in any other state(s)?

☒ Yes ☐ No

Other States

All States

Does the charity have other offices, chapters, branches, affiliates or a parent?

☐ Yes ☒ No

The category that best describes your organization

G - Disease, Disorders, Medical Disciplines

The charitable purpose of the organization

The mission of the American Heart Association is to be a relentless force for a world of longer, healthier lives. Primary focus is on activities related to the causes, diagnosis, prevention, and treatment of cardiovascular disease, stroke, and other related diseases.

Tax & Financial Information

Has your tax exempt status changed since your last renewal?

☐ Yes ☒ No

Last Fiscal Year Start: July 2021

Last Fiscal Year End: June 2022

Type of 990 Tax Form Filed: 990 (Long Form)

Gross Revenue

Direct and Indirect Public Contributions	\$ 591,778,325.00
Government Grants	\$ 16,267,076.00
Program Service Revenue	\$ 54,923,656.00
Special Events and Activities	\$ 19,101,446.00
Gross Sales of Inventory	\$ 108,720,738.00
Other Revenue	\$ 107,032,399.00
Total Revenue	\$ 897,823,640.00

Expenses

Total Program Expenses	\$ 591,473,995.00
Direct Expenses from Special Events	\$ 30,360,739.00
Cost of Goods Sold	\$ 11,710,884.00
Management and General Expenses	\$ 71,484,796.00
Fundraising Expenses	\$ 88,758,359.00
Other Expenses	\$ 7,937.00
Total Expenses	\$ 793,796,710.00

Excess/Deficit For the Year (Total Revenue - Total Expenses)	\$ 104,026,930.00
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Changes in Net Assets/Fund Balances

Net Assets/Fund Balances at Beginning of Year	\$ 1,145,463,928.00
Other Changes in Net Assets or Fund Balances	(\$ 137,284,185.00)
Net Assets/Fund Balances	\$ 1,112,206,673.00
Total Liabilities at End of Year	\$ 474,235,955.00
Net Assets/Fund Balances at End of Year	\$ 1,112,206,673.00

Solicitation Information

Have you been enjoined by any court from soliciting contributions?

☐ Yes ☒ No

Does your organization contract with or otherwise engage the services of any outside fundraising professional (such as a “professional fund-raiser,” “paid solicitor,” “fund raising counsel,” or “commercial co-venturer”)?

☒ Yes ☐ No

Officer Information

Do you need to modify the current officers?

☒ Yes ☐ No

List each officer, director, and trustee (at least 2 officers are required, and you must list officers who have or share the following titles: "Chief Financial Officer", "Custodian of Contributions", "Custodian of Final Distributions")

DELOITTE & TOUCHE LLP
2200 ROSS AVENUE
DALLAS, TX 75201, USA
Title(s): Accountant

Adam Renken
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Custodian of Contributions

Bertram Scott
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member, Officer

Cyndi Roberts
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Custodian of Contributions, Chief Fiscal Officer

Donald Lloyd-Jones
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member, Officer

Douglas Boyle
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Ileana Pina
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

James Postl
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Jeremy Beauchamp
4217 Park Place Court
Glen Allen, VA 23060, USA
Title(s): Custodian of Final Distributions, Vice President

John Warner

7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Keith Churchwell
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Larry Cannon
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Chief Administrative Officer

Lee Shapiro
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Treasurer, Board Member

Linda Gooden
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Marcella Roberts
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Marsha Jones
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Officer, Board Member

Michelle Albert
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member, President

Nancy Brown
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Chief Executive Officer

Raymond Vara
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Chairman

Regina Benjamin
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Robert Harrington
120 Wyntrope Way
Franklin, TN 37067, USA
Title(s): Board Member

Ron Haddock
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Shawn Dennis

7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Suzie Upton
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Custodian of Final Distributions, Vice President

JOSEPH WU MD
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member, Officer

Thomas Windsor
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

Tom Greco
7272 Greenville Avenue
Dallas, TX 75231, USA
Title(s): Board Member

JOSEPH WU MD
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member, Officer

CHERYL ANDERSON
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member

KATIE MILLER-SMITH
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member

CHERYL PEGUS MD
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member

SVATI SHAH MD
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member

BOB SWAN
7272 GREENVILLE AVENUE
USA, DALLAS, TX 75231-5129
Title(s): Board Member

Has any officer, director, manager, operator, or principal of the organization been the subject of an injunction, judgement, or administrative order or been convicted of a felony?

☐ Yes ☒ No

Signature

I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

Signed Electronically: Cyndi Roberts

Date: 08/02/2023

Title: Chief Fiscal Officer

I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

Signed Electronically: Larry Cannon

Date: 08/02/2023

Title: Chief Administrative Officer



Tre Hargett
Secretary of State

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Department of State

State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2555
Fax: 615-253-5173
sos.tn.gov/charities

Date: 08/02/2023

Invoice: 2023-06286

Customer Information

Mr. FERNANDO SALAZAR
AMERICAN HEART ASSOCIATION, INC.
7272 GREENVILLE AVENUE
DALLAS, 75231

Tracking Number	Description	Amount Paid
2023123511	CH Filing Late Fee	\$ 50.00
2023123511	CH Charitable Renewal	\$ 10.00
Payment Details		
Fee Total:		\$ 60.00
Payment Total:		\$ 60.00
Amount Due:		\$ 0.00
Payment Method		
Payment Type: eCheck		
Check/Confirmation Number: 3855731410		