# Form 990-E7

### Short Form Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

2016

OMB No. 1545-1150

Open to Public Inspection

Department of the Treasury

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-EZ and its instructions is at www.irs.gov/form990. Internal Revenue Service , 20 16 A For the 2016 calendar year, or tax year beginning January 1 2016, and ending December 31 C Name of organization B Check if applicable: D Employer identification number Address change The Heart2Heart Foundation, Inc. 46-1239466 Name change Room/suite E Telephone number Number and street (or P.O. box, if mail is not delivered to street address) Initial return P. O. BOX 2991 (803) 524-5671 Final return/terminated City or town, state or province, country, and ZIP or foreign postal code F Group Exemption Amended return Number ▶ Application pending Rock Hill, SC 29732 H Check ▶ if the organization is not www.theheart2heartfoundation.org required to attach Schedule B J Tax-exempt status (check only one) - 

√ 501(c)(3) 

501(c) ( (Form 990, 990-EZ, or 990-PF). 527 ◆ (insert no.) 
☐ 4947(a)(1) or K Form of organization: 

✓ Corporation ☐ Trust Association Other L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ . . . . . . . . . . . . . . . Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I) Check if the organization used Schedule O to respond to any question in this Part I . . .  $\checkmark$ 1 1 38,865 2 Program service revenue including government fees and contracts 2 2,620 3 3 0 Investment income . . . . . . . . 4 4 0 Gross amount from sale of assets other than inventory 5a Less: cost or other basis and sales expenses . . . . . . . . 0 Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . 5c C 6 Gaming and fundraising events Gross income from gaming (attach Schedule G if greater than Revenue 6a Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000) . . . 6b Less: direct expenses from gaming and fundraising events . . . 6c Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract 0 7a Gross sales of inventory, less returns and allowances . . . 7a Less: cost of goods sold . . . . . . . . . . . . . . . . . . Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) 7c 0 8 8 116,178 9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 9 157,663 10 Grants and similar amounts paid (list in Schedule O) 10 0 11 Benefits paid to or for members . . . . . . . . . . . . . . . . . . 11 0 12 Salaries, other compensation, and employee benefits . . . . . 12 0 13 Professional fees and other payments to independent contractors . 13 3,681 Occupancy, rent, utilities, and maintenance . . . . . . . . . . . . 14 14 654 15 15 20,385 16 16 136,379 17 156,764 Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . . 18 18 900 Net Assets 19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with 19 227 20 Other changes in net assets or fund balances (explain in Schedule O) . . . . . 20 0

Net assets or fund balances at end of year. Combine lines 18 through 20

1,127

Pa	rt II Balance Sheets (see the instructions f					
	Check if the organization used Schedule	O to respond to a	ny question in this	Part II		🗆
				(A) Beginning of year		(B) End of year
22	Cash, savings, and investments		1	227	22	1,127
23	Land and buildings		1		23	7,121
24	Other assets (describe in Schedule O)		[		24	
25	Total assets			227	25	1,127
26	Total liabilities (describe in Schedule O)		1		26	1,127
27	Net assets or fund balances (line 27 of column	(B) must agree with	h line 21)	227		1,127
Par						1,147
	Check if the organization used Schedule	O to respond to a	ny question in this	Part III 🗸		Expenses
Wha	t is the organization's primary exempt purpose?				6	ired for section
as n	neasured by expenses. In a clear and concise m	shments for each of its three largest program services, anner, describe the services provided, the number of				)(3) and 501(c)(4) izations; optional for s.)
	ons benefited, and other relevant information for ea	1 0				
28	Prevention/Support: The mission of The Heart2Heart					
	loved ones to take action that prevents heart disease					
	American women already have one or more risk factor (Grants \$ ) If this amount	ors for developing he includes foreign gra			28a	84,017
29	Education Awareness: While heart disease is the nu	mber one killer of wo	men and men in the	United States,		- 1,011
	many still cite cancer to be their greatest health threa					
	of more Americans each year than all of the cancers					
		includes foreign gra			29a	54,113
30	Advocacy: As an all-volunteer organization, voluntee	The state of the s		The same of the sa	200	34,113
	our mission. In 2016, we launched our new #RedHear	tMamas advocacy pr	ogram to encourage	and train women		
	to share our message of the prevention and early det (Grants \$ ) If this amount	ection of heart disea includes foreign gra			30a	4,272
31	Other program services (describe in Schedule O)					
	(Grants \$ ) If this amount	includes foreign gra	ints, check here .	▶ □	31a	
32	L. S h S h				32	142,401
Par	List of Officers, Directors, Trustees, and Key Check if the organization used Schedule				nstruct	tions for Part IV)
		(b) Average	(c) Reportable	(d) Health benefits,	Ť	
	(a) Name and title	hours per week devoted to position	compensation (Forms W-2/1099-MISC (if not paid, enter -0-)		ot	stimated amount of her compensation
Sheil	a J Caldwell					
Presi	dent/Founder	40			0	0
Deb	King					
Vice	President/CoFounder	2			0	0
Jimm	nie Sherrill					
Secr	etary	4			0	. 0
Paul	W Caldwell				T	
Treas	surer	10			0	0
Aliso	n Mallard					
Mem	ber Director	6			0	0
Katie	Price					
Mem	ber Director	4			0	0
April	Mandan					
Mem	Maylor		l .			
	Maylor ber Director	2			0	0
		2			0	0
		2			0	0
		2			0	0
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		2	(		0	0

Part				_
	instructions for Part V) Check if the organization used Schedule O to respond to any question in this	Part		✓
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a		Yes	No
	detailed description of each activity in Schedule O	33		1
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)	34		,
35a	Did the organization have unrelated business gross income of \$1,000 or more during the year from business			
b	activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a 35b		_
С	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III	35c		
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36		1
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a	071		
38a	Did the organization file Form 1120-POL for this year?	37b 38a		1
b	If "Yes," complete Schedule L, Part II and enter the total amount involved	000		
39 a	Section 501(c)(7) organizations. Enter: Initiation fees and capital contributions included on line 9			
b	Gross receipts, included on line 9, for public use of club facilities			
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶			
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b		1
С	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958			
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization			
е	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e		1
41	List the states with which a copy of this return is filed ▶ South Carolina and North Carolina			
42a	3	303-52		1
b	Located at ► 157 Hightide Drive, Rock Hill, SC ZIP + 4 ►  At any time during the calendar year, did the organization have an interest in or a signature or other authority over	29732	-7623 Yes	No
	a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		✓
	If "Yes," enter the name of the foreign country: ►  See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and			
	Financial Accounts (FBAR).	10		
С	At any time during the calendar year, did the organization maintain an office outside the United States? .  If "Yes," enter the name of the foreign country:	42c		<b>✓</b>
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the tax year		. 1	► □
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be	91660	Yes	NO
та	completed instead of Form 990-EZ	44a		1
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44b		1
c	Did the organization receive any payments for indoor tanning services during the year?	44c		1
d	If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schodule O			
45-	explanation in Schedule O	44d		-
45a b	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		1
D	meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of			
	Form 990-EZ (see instructions)	45b		/

46 oles for 47 48 49a 49b		
47 48 49a		
47 48 49a		
47 48 49a		
47 48 49a	_	No
47 48 49a	_	No
47 48 49a		
48 49a		
49a		<b>1</b>
_	_	<b>V</b>
49b		<b>✓</b>
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Yes		
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### SCHEDULE A (Form 990 or 990-EZ)

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

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

OMB No. 1545-0047

Open to Public

Department of the Treasury Internal Revenue Service

▶ Attach to Form 990 or Form 990-EZ. Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Inspection

Hallio	or the organization					Employer identification	Humber		
_	The Heart2Heart Foundation, Inc.  46-1239466  Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.								
Par							ns.		
	The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)  1								
	A school described in section								
	A hospital or a cooperative hos					* *			
4									
	hospital's name, city, and state;								
5	An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)								
8	A community trust described in	section 170(b)	(1)(A)(vi). (Complete I	Part II.)					
10	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 331/3% 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.)								
11	An organization organized and								
12	An organization organized and								
	of one or more publicly suppo								
	Check the box in lines 12a throi								
а	□ Type I. A supporting organi the supported organization								
	supporting organization. You					rie directors or trust	ees or the		
b	☐ Type II. A supporting organ	-				supported organizati	on(s), by having		
	control or management of to organization(s). You must of	the supporting o	rganization vested in	the same					
С	Type III functionally integrits supported organization(s						ally integrated with,		
d	☐ Type III non-functionally is								
	that is not functionally integ						d an attentiveness		
	requirement (see instruction						:		
е	<ul> <li>Check this box if the organi functionally integrated, or T</li> </ul>						II, Type III		
f	Enter the number of supported o		tionally integrated so	sporting (	Ji gai iizac	ion.			
g	Provide the following information		orted organization(s).						
	(i) Name of supported organization	(ii) EIN	(iii) Type of organization		rganization	(v) Amount of monetary	(vi) Amount of		
			(described on lines 1–10 above (see instructions))	listed in you docur	ur governing ment?	support (see instructions)	other support (see instructions)		
	5		above (see mendonomy)			in isa actions)	instructions		
				Yes	No				
(A)									
(B)									
(C)									
(D)									
(E)									
Total			STATE OF THE PERSON NAMED IN				Employee and the second		

Schedul	e A (Form 990 or 990-EZ) 2016						Page 2
Part							
	(Complete only if you checked the	e box on line	e 5, 7, or 8 of I	Part I or if the	organization	failed to qua	lify under
	Part III. If the organization fails to	qualify unde	er the tests list	ted below, ple	ease comple	te Part III.)	
Secti	on A. Public Support						
Calen	dar year (or fiscal year beginning in)	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not						
	include any "unusual grants.")		29,814.00	42,971.00	47,724.00	41,485.00	161,944.00
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3	The value of services or facilities furnished by a governmental unit to the organization without charge						
4	Total. Add lines 1 through 3		29,814.00	42,971.00	47,724.00	41,485.00	161,944.00
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)			+			10 1/0 1/100
6	Public support. Subtract line 5 from line 4						
Secti	on B. Total Support						
Calen	dar year (or fiscal year beginning in) 🕨	(a) 2012	<b>(b)</b> 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
7	Amounts from line 4		29,814.00	42,971.00	47,724.00	41,485.00	161,944.00
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9	Net income from unrelated business activities, whether or not the business is regularly carried on						
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)		0	0	111,419.00	116,178.00	227,597.00
11	Total support. Add lines 7 through 10						389,541.00
12	Gross receipts from related activities, etc.	*				12	0.00
13	First five years. If the Form 990 is for the	~					
	organization, check this box and stop he	re					▶ ☑
Secti	on C. Computation of Public Suppor		THE RESIDENCE OF THE PARTY OF T				
14	Public support percentage for 2016 (line 6					14	%
15 16a	Public support percentage from 2015 Schedule A, Part II, line 14						check this
b	331/3% support test—2015. If the organithis box and stop here. The organization	zation did not	check a box or	n line 13 or 16a	a, and line 15	is 331/3% or mo	ore, check
17a	10%-facts-and-circumstances test—20 10% or more, and if the organization me Part VI how the organization meets the " organization	ets the "facts facts-and-circ	s-and-circumsta cumstances" tes	nces" test, ch st. The organiz	eck this box a ation qualifies	nd stop here. as a publicly	Explain in supported
h	10%-facts-and-circumstances test - 2	ME If the ore	enization did n	at aback a bay	on line 12 1	60 16h or 17	and line

15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly 

Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see

Part VI	III, line 12; Part IV, Sec B, lines 1 and 2; Part I 3a, and 3b; Part V, line	ction A, lines 1, 2, 3b, V, Section C, line 1; l e 1; Part V, Section B	xplanations required by Pa , 3c, 4b, 4c, 5a, 6, 9a, 9b, Part IV, Section D, lines 2 , line 1e; Part V, Section E r any additional informatio	9c, 11a, 11b, and 11c, and 3; Part IV, Section D, lines 5, 6, and 8; and	Part IV, Section E, lines 1c, 2a, 2b,
Part II: Sect	ion B Total Support - Line	10 Other Income			
In Kind Dona	ations				
Description		Amount			
Volunteer Se	ervices - non-GAAP	84,148.04			
Screenings		20,720.00			
Printing - Pr	ograms	11,310.00			
Total In Kind		116,178.04			***************************************
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#### SCHEDULE O (Form 990 or 990-EZ)

### 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.

OMB No. 1545-0047

Employer identification number

Department of the Treasury Internal Revenue Service Name of the organization ▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

The Heart2Heart Foundation, Inc. 46-1239466 Part II: Section B Total Support - Line 10 Other Income In Kind Donations Description Amount Volunteer Services - non-GAAP 84,148.04 Volunteers for health fairs, meetings, awareness events Screenings 20,720.00 Blood tests, BMI calculation, EKG's and consultation and supplies Printing - Programs 11,310.00 Educational Flyers promoting good health habits Total In Kind Gifts 116,178.04 PART 1: REVENUE, EXPENSES, AND CHANGES IN NET ASSETS OR FUND BALANCES, LINE 16 - OTHER EXPENSES DESCRIPTION OF OTHER EXPENSES AMOUNT Screening Scholarships 22,013.85 Business Registration Fees 51.85 State Sales Tax 380.99 875.00 Legal Fees Volunteer Services - non-GAAP 83,393.30 9,722.63 Supplies - General Software Subscriptions 433.46 Advertising 1,686.06 1,400.00 Insurance Liability D&O 293.50 Internet Expense - General Memberships and Dues 263.35 Other Costs 293.96 Staff Development 431.00 Domain Registration Fees 488.90 Food and Drink Expense - Conference 10,660.00 Travel 2,751.22 Food and Drink Expense - Meeting 1,239.58

Schedule O (Form 990 or 990-EZ) (2016) Page 2 Name of the organization Employer identification number THE HEART2HEART FOUNDATION, INC. 46-1239466 TOTAL LINE 16 OTHER EXPENSES 136,378.66 PART III: STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS - PREVENTION AND SUPPORT (CONT'D) equates to more than 1.3 million women, between the ages of 20 and 70, who are at risk or living with heart disease. According to national trends, a third of these women typically have the metabolic syndrome which puts them at higher risk of heart attack, stroke, and premature death. Because most women learn that they have cardiovascular disease only after they suffer a heart attack, stroke or, worse, they die, our goal is to help more women learn their risk for the disease, identify those who have already developed the disease, and to increase participation in prevention or intervention programs with health care providers. To better serve families in our state, we have extended our screening initiatives to include men. We accomplish our mission through our ongoing monthly screening events and our annual Statewide Screening initiative held each Heart Month (February), Through our partnerships with health care providers across the state, 783 South Carolinians received free heart disease risk assessments and related educational materials to help address their respective risk factors. Participants who were classified as moderate-to-high risk, or who presented symptoms of concern, were referred to their primary care physician or cardiologist for follow-up. In 2016, our health care provider partners included nine hospitals, two reduced-fee clinics, and two free clinics. In addition to the free basic heart health screenings, The Heart2Heart Foundation provided Advance Screening scholarships to 26 eligible women who received 12-lead EKG and Coronary Calcium Scoring screenings, which included consultations with board-certified cardiologists. PART III: LINE 29 - EDUCATION AWARENESS (CONT'D) heart disease can be prevented or managed, awareness and education programs are critical in our community outreach efforts. At our largest community event, the Back2School Block Party held in August, over 1,200 parents and children received free (age-appropriate) heart health educational materials. Of those, 102 adults received a free diabetes screening, 300 adults received free blood pressure screenings, and 500 students received free book bags with basic school supplies. During the four-hour event, parents and students received free information and access to resources from 30 of our collaborative community partners which reinforced our message about making healthy choices through nutrition, fitness and eliminating smoking/drug use. During 2016, The Heart2Heart Foundation also distributed free heart health educational materials through 33 community events including the SC Strawberry Festival, COOLFest and Summerfest. In addition, we provided free educational programs and materials through 12 corporate health fairs and events. In 2016, to increase awareness and educate more women and their families about the prevention of heart disease, The Heart2Heart Foundation hosted or served through a total of 65 community, faithfaith-based and corporate events. Through these events, we distributed free heart health educational materials to more than 4,000 adults

and 1,000 children.

Schedule O (Form 990 or 990-EZ) (2016)	Page 3
Name of the organization	Employer identification number
THE HEART2HEART FOUNDATION, INC.	46-1239466
PART III: LINE 30 - ADVOCACY	
n addition, we continue to communicate and educate local, state and federal leaders about the need for in	creased awareness, education and
early detection of heart disease. Through the successful launch of our efforts regarding Coronary Calcium	Scoring, we helped educate more
of our leaders about this life-saving screening and the need for expanded availability and coverage by inst	urance.
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