



Hector Balderas
Attorney General

Attorney General of New Mexico

Registry of Charitable Organizations
111 Lomas Blvd. NW, Suite 300
Albuquerque, NM 87102

(505) 222-9000
Fax: (505) 222-9006

NM Charitable Organization Registration Statement

Registration Tax Year

2015

Fiscal Year Period

7/1/2015 - 6/30/2016

Registration Status: **Registration Submitted**

Status Date: **February 10, 2017**

Registration Number: **20153621704145530**

Charity Name: New Mexico Military Institute Foundation, Inc.

FEIN: 85-6010718

Website Address: www.nmmi.edu/foundation

E-Mail Address: foundation@nmmi.edu

Fiscal Year End Month: 06 *Day:* 30

Incorporated: Yes *State:* NM *Date:* 10/9/1945

Organization Type:

Establish Date:

Other Names for Charity: NMMI Foundation, Inc.

New Mexico Military Institute Foundation, Inc.

Primary Address: 101 W. College Blvd
Roswell, NM 88201

Mailing Address: 1808 Aston Avenue, Suite 230
Carlsbad, CA 92008

Other Addresses: No Other Addresses

Phone Numbers: 575-624-8035 (Telephone)

760-931-2620 Ext: 123 (Telephone)

575-624-8037 (Fax)

NTEE Classifications: B11 Single Organization Support
B12 Fund Raising & Fund Distribution

Charity Purpose: The purpose of the organization is to create, maintain and administer an endowment fund for the benefit of New Mexico Military Institute (NMMI) to be used for research, scientific and literary purposes; for increasing the buildings, equipment and other facilities of NMMI; to provide for scholarships; and to promote the growth, welfare and maintenance of NMMI.

Solicitation Methods: E-Mail
Internet
Mail
Personal Contact
Special Events
Supported by Trust or Grant Grant Proposals
Other Corporate Solicitation

Charity Individuals:

<i>Name:</i> Barnes, Jimmy	575-624-8021
<i>Position Title:</i> President & CEO	jimmyb@nmmi.edu
<i>Annual Compensation:</i> \$96,899.00	
<i>Address:</i> 101 W. College Blvd Roswell, NM 88201	
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<i>Name:</i> Elliott, Steve	505-986-6088
<i>Position Title:</i> Immediate Past Chairman	steve@elliottol.net
<i>Annual Compensation:</i> \$0.00	
<i>Address:</i> 101 W. College Blvd Roswell, NM 88201	
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<i>Name:</i> Kerr, Harris	432-684-9222
<i>Position Title:</i> Treasurer	harris@permianabstract.com
<i>Annual Compensation:</i> \$0.00	
<i>Address:</i> 101 W. College Blvd Roswell, NM 88201	
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<i>Name:</i> Salazar, Jesus	505-232-7730
<i>Position Title:</i> Vice Chairman	jesus11salazar@aol.com
<i>Annual Compensation:</i> \$0.00	
<i>Address:</i> 101 W. College Blvd Roswell, NM 88201	
<hr/>	
<i>Name:</i> Solomon, James	575-336-1929

Position Title: Chairman of the Board jsolomon45@windstream.net

Annual Compensation: \$0.00
Address: 101 W. College Blvd
Roswell, NM 88201

Charity Individuals:

Name: Waggoner, Richard 575-623-3600

Position Title: Secretary rwagg@cableone.net

Annual Compensation: \$0.00
Address: 101 W. College Blvd
Roswell, NM 88201

Individuals who are authorized to sign checks:

Barnes, Jimmy President & CEO

Waggoner, Richard Secretary

Individuals who are responsible for fund raising:

Barnes, Jimmy President & CEO

Individuals who are responsible for the distribution of funds:

Barnes, Jimmy President & CEO

Individuals who have custody of financial records:

Barnes, Jimmy President & CEO

Individuals who have custody of funds:

Barnes, Jimmy President & CEO

Accountant/Auditor:

Job Title: External Auditor

Company: Axiom Certified Public Accountants and Business Advisors, LLC

Address: Sun Valley Commercial Center
316 Osuna Road, NE, Suite 401
Albuquerque, NM 87107

Phone Number: 505-767-7600

Fax Number: 505-767-7601

Person Authorized to Receive Service of Process:

Person Name: Cavalcante, Riina

Job Title: Registration Specialist

Company: Labyrinth, Inc.

Address: 1808 Aston Avenue
Suite 230
Carlsbad, CA 92008

Phone Number: 760-931-2026

Professional Fundraisers:

Question and Answer:

Q: Has organization or any of its officers, directors, employees or fund raisers ever been enjoined or otherwise prohibited by a government agency/court from soliciting?

A: No

Q: Has organization or any of its officers, directors, employees or fund raisers had its registration been denied or revoked?

A: No

Q: Has organization or any of its officers, directors, employees or fund raisers ever been the subject of a proceeding regarding any solicitation or registration?

A: No

Q: Has organization or any of its officers, directors, employees or fund raisers ever entered into a voluntary agreement of compliance with any government agency or in a case before a court or administrative agency?

A: No

Q: Has organization or any of its officers, directors, employees or fund raisers registered with or obtained exemption from any state or agency?

A: No Registred- AK, CA, CO, KY, ME, MA, MI, MN, NJ, NM, NY, ND, OH, OR, PA, RI, SC, UT, WA.
Exempt- AL, AR, CT, FL, GA, HI, IL, KS, MD, MS, MO, NH, NH, NC, OK, TN, VA, WV, WI.

Q: Has organization or any of its officers, directors, employees or fund raisers solicited funds in New Mexico?

A: Yes Internet, Corporate Solicitation, Grant Proposals, Personal Contact, Direct Mail, Special Events, E-mail

Q: Are any of the organization's officers, directors, trustees or employees related by blood, marriage, or adoption to: (a) any other officer, director, trustee or employee OR (b) any officer, agent, or employee of any fundraising professional firm under contract to the organization OR (c) any officer, agent, or employee of a supplier or vendor firm providing goods or services to the organization?

A: No

Q: Does the organization or any of its officers, directors, employees, or anyone holding a financial interest in the organization have a financial interest in a business described in (b) or (c) in previous question OR serve as an officer, director, partner or employee of a business described in (b) or (c) in previous question?

A: No

Q: *Have any of the organization's officers, directors, or principal executives ever been convicted of a misdemeanor or felony?*

A: No

Q: *Does the organization receive financial support from other non-profit organizations (foundations, public charities, combined campaigns, etc.)?*

A: Yes Waterhouse Charitable Trust

Q: *Does the organization share revenue or governance with any other non-profit organization?*

A: No

Q: *Does any other person or organization own a 10% or greater interest in your organization OR does your organization own a 10% or greater interest in any other organization?*

A: No

<i>Applied For Tax Exempt:</i>	Yes	2/18/1959
<i>Granted Tax Exempt:</i>	Yes	2/18/1959
<i>IRS Section:</i>	501(c)(3)	
<i>Tax Exempt Ever Denied:</i>	No	
<i>Tax Exempt Ever Revoked:</i>	No	
<i>Tax Exempt Ever Modified:</i>	No	
<i>Contributions Tax Deductible:</i>	Yes	

Banks:

Wells Fargo Bank, N.A.
575-622-3441
400 North Pennsylvania Avenue
Roswell, NM 88201

Annual Financials

Tax Year:	2015
<i>IRS Document Filed:</i>	990
<i>Total Contributions:</i>	\$708,565.00
<i>Total Gross Revenue:</i>	\$1,171,346.00
<i>Total Expenses:</i>	\$2,377,708.00

Program Services Expenses: \$2,037,102.00
Management General Expenses: \$335,459.00
Fundraising Expenses: \$5,147.00

Beginning of Year Net Assets: \$48,281,604.00
End of Year Net Assets: \$46,199,968.00

*Gross Professional Fundraising
Collections:* \$0.00
*Net Professional Fundraising
Collections:* \$0.00

Registration Submitted By:

Cavalcante, Riina
Registration Specialist
Registration Agent

760-931-2620
riina@labyrinthinc.com