

STATE OF NEW MEXICO
OFFICE OF THE ATTORNEY GENERAL



Registry of Charitable Organizations
P.O. Drawer 1508
Santa Fe, NM 87504-150
charity.registrar@nmag.gov
(505) 717-3500 or 1-844-255-9210

HECTOR H. BALDERAS
ATTORNEY GENERAL

NM Charitable Organization Registration Statement

Tax Year 2020 - fiscal period beginning 7/1/2020 and ending 6/30/2021

Status is Registration Submitted (20203212216659903) as of 6/15/2022

For up to date status information, visit <https://secure.nmag.gov/CharitySearch/CharityDetail.aspx?FEIN=85-0135073>

Charity Name: LifeROOTS Inc.

FEIN: 85-0135073

Website Address: www.lifeROOTSnm.org

E-Mail Address: info@LifeROOTSnm.org

Fiscal Year End Month: 06 *Day:* 30

Incorporated: Yes *State:* NM *Date:* 3/24/1958

Organization Type:

Establish Date:

Other Names for Charity: LifeROOTS

Primary Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107

Mailing Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107

Other Addresses:
1909 29th St.
Rio Rancho, NM 87124

Phone Numbers: 505-255-5501 Ext: 1800 (Telephone)

Phone Numbers: 505-255-9971 (Fax)
505-962-0270 (Telephone)

NTEE Classifications: J30 Vocational Rehabilitation
P30 Children & Youth Services
P82 Developmentally Disabled Centers

Charity Purpose: Providing people with disabilities and their families the resources and support they need to empower their lives and shape their futures.

Solicitation Methods: Supported by Trust or Grant SourceAmerica
Internet Web site
Supported by Trust or Grant Anderson Charitable Foundation
Supported by Trust or Grant NMDOT Section 5310 Grant
Other Smiths Community Rewards
Internet Smile.Amazon Charitable Donations

Charity Individuals: Name: Cooper, Dwanna 255-5501
Position Title: Director of Human Resources DwannaC@LifeROOTS
nm.org

Annual
Compensation: \$71,050.00
Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107

Name: Epstein, Carol
Position Title: Board Secretary
Annual
Compensation: \$0.00
Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107

Name: Esquibel, Dawn
Position Title: Treasurer
Annual
Compensation: \$0.00
Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107

Name: Guerra, Carol
Position Title: Board Member
Annual
Compensation: \$0.00
Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107

Charity Individuals:

<i>Name:</i> Hayden, Michelle	255-5501 x1801
<i>Position Title:</i> Finance Director	MichelleH@LifeROOTS NM.org
<i>Annual Compensation:</i> \$60,320.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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<i>Name:</i> Molina, Matthew	255-5501
<i>Position Title:</i> Director of Contracts	MatthewM@LifeROOTS nm.org
<i>Annual Compensation:</i> \$65,100.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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<i>Name:</i> Molina, Matthew	5052555501 ext
<i>Position Title:</i> President and CEO	matthewm@liferootsnm. org
<i>Annual Compensation:</i> \$94,800.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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<i>Name:</i> Ortega, Angela	255-5501
<i>Position Title:</i> Director of Children's and Therapy Services	AngelaO@LifeROOTSn m.org
<i>Annual Compensation:</i> \$80,600.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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<i>Name:</i> Ortega, Angela	255-5501
<i>Position Title:</i> Director of Community Services	AngelaO@LifeROOTSn m.org
<i>Annual Compensation:</i> \$80,600.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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<i>Name:</i> Salazar, Catherine	
<i>Position Title:</i> Board Member	
<i>Annual Compensation:</i> \$0.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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<i>Name:</i> Saldyt, Myron "Sal"	
<i>Position Title:</i> Board Member	
<i>Annual Compensation:</i> \$0.00	
<i>Address:</i> 1111 Menaul Blvd. NE Albuquerque, NM 87107	
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Charity Individuals:

Name: Silva, Maggie

Position Title: Board Chairman

Annual

Compensation: \$0.00

Address: 1111 Menaul Blvd. NE

Albuquerque, NM 87107

Name: Strickler, Leslie

Position Title: Board Member

Annual

Compensation: \$0.00

Address: 1111 Menaul Blvd. NE

Albuquerque, NM 87107

Name: Valdez, Ernesto

5052555501 ext

Position Title: Director of Safety, Facilities
and Fleet

ernestov@liferootsnm.org

Annual

Compensation: \$60,200.00

Address: 1111 Menaul Blvd. NE

Albuquerque, NM 87107

Name: Vigil, Jeanne

Position Title: Board Chairman

Annual

Compensation: \$0.00

Address: 1111 Menaul Blvd. NE

Albuquerque, NM 87107

Responsibilities:

Individuals who are authorized to sign checks: Cooper, Dwanna
Esquibel, Dawn
Guerra, Carol
Molina, Matthew

Director of Human
Resources
Treasurer
Board Member
President and CEO

Individuals who are responsible for fund raising: Molina, Matthew
Silva, Maggie

President and CEO
Board Chairman

Individuals who are responsible for the distribution of funds: Hayden, Michelle
Molina, Matthew

Finance Director
President and CEO

Individuals who have custody of financial records: Hayden, Michelle

Finance Director

Individuals who have custody of funds: Molina, Matthew

President and CEO

Accountant/Auditor:

Person Name: Lewis, Barbara
Job Title: Principal Assurance
Company: CliftonLarsonAllen LLP
Address: 6501 Americas Pkwy NE
Suite 700
Albuquerque, NM 87110
Phone Number: 5053141609
Fax Number: 5054509142
E-Mail Address: Barbara.Lewis@claconnect.com

*Person Authorized to Receive
Service of Process:*

Person Name: Molina, Matthew
Job Title: President and CEO
Company: LifeROOTS Inc.
Address: 1111 Menaul Blvd. NE
Albuquerque, NM 87107
Phone Number: 505-255-5501
Fax Number: 505-255-9971
E-Mail Address: matthewm@liferootsnm.org

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

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

A: Yes Capital campaign
 Place to donate on web site
 Mail
 Annual Pi(e) Event March 12th

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: Yes Carol Guerra, Board Member, is an owner of All-Star Insurance, 2625 Pennsylvania NE, Ste 710, Albuquerque, NM 87110.

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
 Anderson Charitable Foundation

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

Applied For Tax Exempt: Yes 2/28/1963
Granted Tax Exempt: Yes 2/28/1963
IRS Section: 501(c)(3)
Tax Exempt Ever Denied: No
Tax Exempt Ever Revoked: No

Tax Exempt Ever Modified: No
Contributions Tax Deductible: Yes

Banks:

US Bank
1-800-673-3555
P. O. Box 1800
Saint Paul, MN 55101-0800

Bank of the West
1-800-488-2265
P.O. Box 2830
Omaha, NE 68103-2830

Annual Financials

IRS Document Filed: 990

Total Contributions: \$1,282,070.00

Total Gross Revenue: \$6,833,932.00

Total Expenses: \$5,707,944.00

Program Services Expenses: \$4,732,854.00

Management General Expenses: \$920,998.00

Fundraising Expenses: \$54,092.00

Beginning of Year Net Assets: \$1,905,921.00

End of Year Net Assets: \$2,968,969.00

Gross Professional Fundraising Collections: \$0.00

Net Professional Fundraising Collections: \$0.00

Tax Year 2020 - fiscal period beginning 7/1/2020 and ending 6/30/2021

Registration Submitted By:

Hayden, Michelle
Finance Director

505-314-8528
michelleh@liferootsnm.org