

November 8, 2022

WRITER'S DIRECT LINE
202.295.4712
rriley@foley.com

CLIENT/MATTER NUMBER
056015-0137

David Morales, Esquire
General Counsel
AARP
601 E Street, N.W., Floor A10
Washington, DC 20049

Re: Statement for AARP Foundation Matter – Through October 2022

Dear David:

Enclosed is our statement through October 2022 for the AARP Foundation matter, which we hope you find satisfactory.

Please let me know if you have any questions about the enclosed statement.

Very truly yours,



Richard F. Riley, Jr.

Enclosure



FOLEY & LARDNER LLP
WASHINGTON HARBOUR
3000 K STREET, N.W.
SUITE 600
WASHINGTON, D.C. 20007-5109
TELEPHONE (202) 672-5300
FACSIMILE (202) 672-5399
WWW.FOLEY.COM

AARP
601 E Street, N.W.
(PO #00040088)
Washington, DC 20049

Date: November 08, 2022
Invoice No.: 50506802
Our Ref. No.: 056015-0137

Remittance Advice

Re: AARP FOUNDATION

Current Invoice:

11/08/22 - 50506802	\$13,443.75
Total Amount Due:	\$13,443.75

Please mail check payments to:

Foley & Lardner LLP
P.O. Box 78470
Milwaukee, WI 53278-8470

Foley & Lardner LLP's preferred payment method is ACH (CTX or CCD+ transmission) with invoice number(s) included in the addenda of the ACH.

Please send electronic payment remittance advice and questions to accountsreceivable@foley.com.

Foley & Lardner LLP
U.S. Bank, NA
777 E. Wisconsin Ave.
Milwaukee, WI 53202
ABA No.: 075000022
Acct No.: 112031389
Swift Code: USBKUS44IMT
(foreign wires only)



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Services through October 31, 2022

Amount due for professional services rendered regarding AARP FOUNDATION	\$14,937.50
Less Discount:	(\$1,493.75)
Total Services:	\$13,443.75
Total Amount Due:	\$13,443.75

Please reference your invoice number 50506802 with your remittance payable to Foley & Lardner LLP. Payment is due promptly upon receipt of our invoice.

Federal Employer Number:
39-0473800

Professional Services Detail

10/03/22	RRJR	Work on drafting and editing memorandum analyzing AARP Foundation grants to Wish of a Lifetime, with attention to 501(c)(3) compliance and Wish's public support computation; research to confirm AARP Foundation's exempt mission and review applicable 501(c)(3) regulations.	2.30	\$3,047.50
10/04/22	ESJ	Research IRS authority regarding public support test and 2% limitation for support from non-public charities; summarize research and correspond with R. Riley regarding same.	4.40	\$2,398.00
10/04/22	RRJR	Continue drafting and editing memorandum analyzing AARP Foundation grants to Wish of a Lifetime, with focus on details of Wish's public support computation; continue tax research on same; complete full preliminary draft of memorandum; communications with E. Jurgena on same.	2.40	\$3,180.00
10/05/22	ESJ	Review memo regarding charitable contributions and 2% limitation; review additional authority regarding related corporations and distributions; conference with R. Riley regarding memo.	1.70	\$926.50
10/05/22	RRJR	Several communications with E. Jurgena to review and discuss her research on 2% public-support rule and "earmarking" in Foundation-Wish-AARP context; revise and edit draft memorandum on Foundation grants to Wish to incorporate E. Jurgena's research; prepare full draft of memorandum and circulate to J. Wyatt and S. Shaw for client review; discuss with E. Jurgena.	1.60	\$2,120.00
10/06/22	ESJ	Review and revise memo regarding contributions to public charities and 2% limitation; correspond with R. Riley on same.	0.40	\$218.00
10/06/22	RRJR	Communications with J. Wyatt and S. Shaw regarding their comments on draft memorandum on Foundation financial support of Wish of a Lifetime; work with E. Jurgena to revise and finalize memorandum; send final Foundation/Wish memo to J. Wyatt and S. Shaw.	0.90	\$1,192.50

AARP

Our Ref. No.:056015-0137

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Foley & Lardner LLP

November 08, 2022

10/28/22	RRJR	Review material from J. Wyatt and D. Morales about Foundation executive compensation review procedures and Form 990 reporting of same; telephone conference with J. Wyatt to discuss same, including changes compelled by CA Nonprofit Integrity Act; review and recirculate our 2005 memorandum to Foundation on CA Nonprofit Integrity Act requirements including CEO/CFO compensation review requirements.	1.40	\$1,855.00
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Subtotal:	\$14,937.50
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Less Discount:	(\$1,493.75)
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Services Total:	15.10	\$13,443.75
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Professional Services Summary

Service Provider	Initials	Hours	Rate	Amount
Emmaline S. Jurgena	ESJ	6.50	\$545.00	\$3,542.50
Richard F. Riley, Jr.	RRJR	8.60	\$1,325.00	\$11,395.00
Totals		15.10		\$14,937.50
