

Florida Department of Agriculture and Consumer Services
Division of Consumer Services



**WILTON SIMPSON
COMMISSIONER**

**CHARITABLE ORGANIZATIONS/SPONSORS REGISTRATION
APPLICATION**

**Solicitation of Contributions Act
Chapter 496, Florida Statutes
Rule 5J-7.004, Florida Administrative Code**

1-800-HELP-FLA (435-7352)
850-410-3800 *Calling Outside Florida*
<https://www.fdacs.gov/ConsumerServices> • 850-410-3804 *Fax*

*Make check or money order
payable and remit
application to:*

FDACS
P.O. Box 6700
Tallahassee, FL 32314-6700

All documents and attachments submitted with this application are subject to public review pursuant to Chapter 119, F.S.

Application Information

Document Tracking Number: 4016004 **Application Date:** 10/25/2024 11:44:12 AM

Business Information

Legal Name: United States Energy Foundation
Business Phone: 415-561-6700
Business Address: 55 Second Street Suite 2400
San Francisco California 94105
Mailing Address: 310 WEST 20TH STREET SUITE 300
KANSAS CITY Missouri 64108
Email Address: aevans@clrk.com
Website Address: www.ef.org
Fictitious Names** Not Applicable

**All fictitious names must be registered with the Division of Corporations. If business is a corporation then 'Name' is the legal name of the business as listed with the Division of Corporations. You must list all names under which you intend to do business.

Organization Information

Form of Organization: Corporation
FEIN: 83-1740146
Established In: Delaware **Legally Established:** 8/21/2018

Business Details

**Month/Day fiscal
year ends:** 12/31

**Organization's
Internal Revenue
Service Status:** 501(c)(3)

Uploads Attached: Yes

Attached Documents

1. **Name:** IRS DETERMINATION LETTER.pdf

Type: Exemption Determination Letter

Purpose of the Organization:

To secure a clean and equitable energy future to tackle the climate crisis.

Purpose for which the contributions are used:

To secure a clean and equitable energy future to tackle the climate crisis.

Major Program activities:

Granted to organizations and institutions that, through education and analysis, made gains in the transition to a clean energy economy in order to tackle climate change. Achievement included (but not limited to) the adoption of stronger building codes and other energy optimization measures, the advancement of cleaner vehicles and fuels, the advancement of renewable energy technologies, progress in low-carbon growth planning and government commitments to achieve 100% clean energy by a target.

License History

Is this charitable organization/sponsor authorized by any other state to solicit contributions?[s. 496.405(2)(d)1, F.S.]

Yes

nationally registered

Has the charitable organization/sponsor entered into an assurance of voluntary compliance(AVC) or agreement similar to that set forth in s.496.420, F.S., in any jurisdiction?[s. 496.405(2)(d)4, F.S.]

No

Has the charitable organization/sponsor or any of its officers, directors, trustees, or employees, regardless of adjudication, been convicted of, found guilty of, pled guilty or nolo contendere to, or been incarcerated within the last 10 years as a result of having previously been convicted of, or found guilty of, or pled guilty or nolo contendere to, any felony within the last 10 years? [s. 496.405(2)(d)5, F.S.]

No

Has the charitable organization/sponsor or any of its officers, directors, trustees, or employees, regardless of adjudication, been convicted of, found guilty of, pled guilty or nolo contendere to, or been incarcerated within the last 10 years as a result of having previously been convicted of, or found guilty of, or pled guilty or nolo contendere to, any crime involving fraud, theft, larceny, embezzlement, fraudulent conversion, misappropriation of property, or any crime enumerated in this chapter or resulted from acts committed while involved in the solicitation of contributions within the last 10 years? [s. 496.405(2)(d)6, F.S.]

No

Has the charitable organization/sponsor or any of its officers, directors, trustees, or principal salaried executive personnel been enjoined in any jurisdiction from soliciting contributions or been found to have engaged in unlawful practices in the solicitation of contributions or administration of charitable assets or been enjoined from violating any law relating to a charitable solicitation? [s. 496.405(2)(d)7, F.S.]

No

Has the charitable organization/sponsor had its registration or authority denied, suspended, or revoked by any governmental agency? [s. 496.405(2)(d)3, F.S.] No

Conflict of Interest

Have all directors, officers and trustees read and complied with the conflict of interest statement for the organization? Yes

Owner/Management Information

Name: Melanie Audette
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

Additional Information

1. Is this person exempt from Public Records? [s. 119.071(4), F.S.] *No*
2. Is this person compensated? *Yes*
3. Has this person, regardless of adjudication, been convicted of, or found guilty of, or pled guilty or nolo contendere to, or been incarcerated within the last 10 years as a result of having previously been convicted of, or found guilty of, or pled guilty or nolo contendere to, any felony within the last 10 years? *No*
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5. Has this person been enjoined from violating any law relating to a charitable solicitation? *No*

Name: Jane L Breyer
Title: In Charge of Solicitation
President
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

Additional Information

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5. Has this person been enjoined from violating any law relating to a charitable solicitation? *No*

Name: Stuart Clarke
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Carlos Curbelo
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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embezzlement, fraudulent conversion, misappropriation of property, or any crime enumerated in this chapter or resulting from acts committed while involved in the solicitation of contributions within the last 10 years? *No*

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Name: Jessica Finn Coven
Title: Vice President
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Arvin Ganesan
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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10 years? *No*

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Name: Bryan Garcia
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Jason Mark
Title: Chief Executive Officer
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Gina McCarthy
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Rose McKinney-James
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Heather McTeer Toney
Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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5. Has this person been enjoined from violating any law relating to a charitable solicitation? *No*

Name: Brian Stanley
Title: In Charge of Distribution
Officer
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Nicole Systrom

Title: Director
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Maria Alvarez
Custody of Records
Title: Director
In Charge of Distribution
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Name: Lupine Seran

Title: Director
In Charge of Distribution
Phone: 415-561-6700
Address: 55 Second Street Suite 2400
San Francisco California 94105

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Branch offices, Chapters or Affiliates

Other Locations: Not Applicable

Professional Solicitors

Other Locations: Not Applicable

Fundraising Consultants

Other Locations: Not Applicable

Commercial Co-venturers

Other Locations: Not Applicable

Financial Statement

Fiscal year ending: 12/31/2022
Financial statement source: 990 w/all attached Schedules
Total Revenue: \$133,310,567
Total Expense: \$189,073,695
Program Service Expense: \$182,472,551
Management & General Expense: \$2,029,612
Fundraising Expense: \$4,571,532

Attached Documents

1. Name: 2022 Form 990 United States Energy Foundation.pdf

Type: Financial Information

Supporting Documents(List of Sources and Amounts)

1. Name: USSEF 2023 Form 8868.pdf

Type: Miscellaneous

Desc: Extension on 2023 Financials

Application Questionnaire

Did the charitable organization or sponsor receive \$50,000 or more in total revenue during the immediately preceding fiscal year? Yes

Are the fundraising activities of the charitable organization or sponsor carried on by any compensated volunteers, members, or officers ? Yes

Are any part of the assets or income of the organization or sponsor inured to the benefit of or paid to any officer or member? No

Does the charitable organization or sponsor utilize a professional fundraising consultant, professional solicitor, or commercial co-venture? No

Registration application Type

Registration Application Type: Charitable
Contributions received in the immediately preceding fiscal year: \$131,930,419
Registration Fee: \$400

Preparer Information

First Name: Ally
Last Name: Evans
Company Name: United States Energy Foundation
Title: Compliance Professional
Phone Number: 816-472-9000
Email Address: aevans@clrk.com

Signature Information

* I declare under penalty of perjury that all of the information provided in this application and in any exhibits attached hereto, is true and correct.

and further state as follows:

* The information furnished in this application and all supplemental forms, reports, documents and attachments are true and correct to the best of my knowledge. [s. 496.405(2) F.S.]

Signature Name: Ally Evans

Signature Date: 10/25/2024

