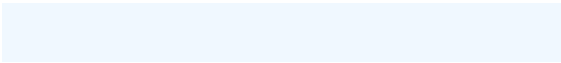


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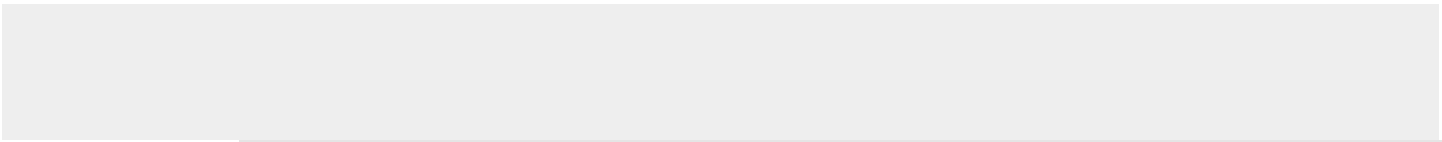
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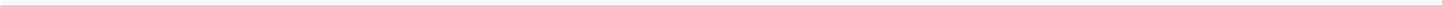
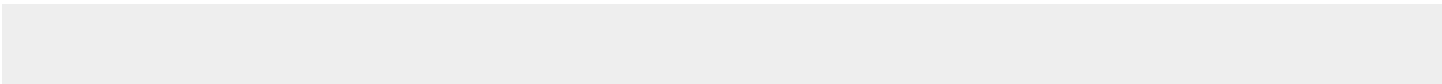
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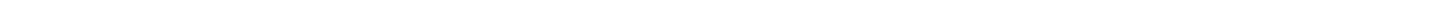




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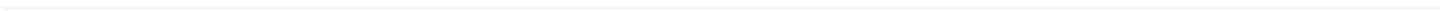
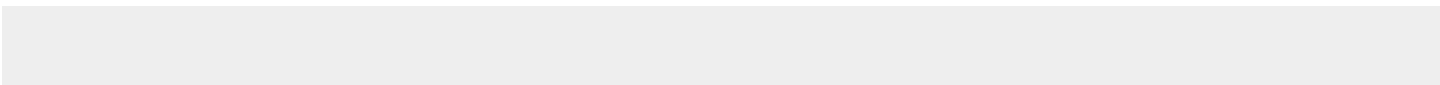
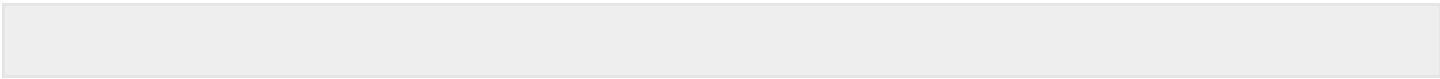
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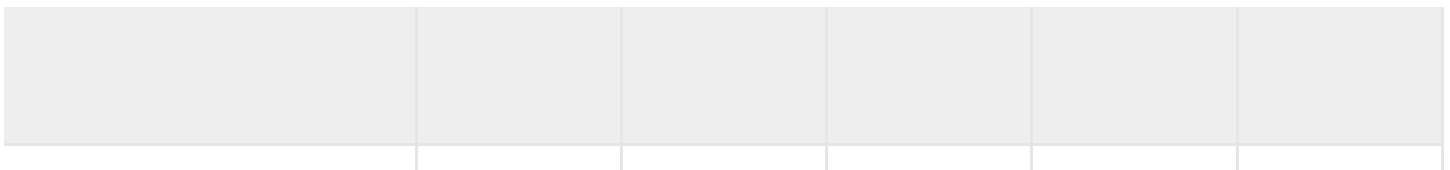
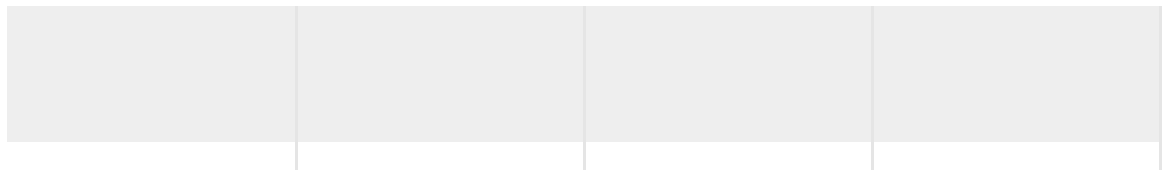
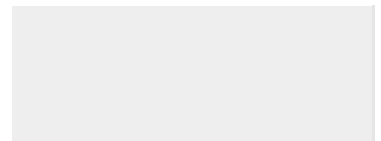
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# Entry 7 Board Member

1. SUNY-AUTHORIZED charter schools are required to provide information to the Trustees of the State University of New York.
2. REGENTS, NYSED, and SUNY DO NOT MONITOR or collect information from SUNY-AUTHORIZED CHARTER SCHOOLS.

ICAHN CHARTER SCHOOL #00000071153

## Authorizer:

Who is the authorizer of your charter school?

SUNY

## 1. 2021-2022 Board Member Information (Enter information for all Board Members)

| Trustee Number | Trustee Name    | Trustee Address | Position       | Commitment  | Volunteer | Number Served | Start Date | End Date | Current Term        |
|----------------|-----------------|-----------------|----------------|-------------|-----------|---------------|------------|----------|---------------------|
| 1              | Gail Golden     | [REDACTED]      | Trustee/Member | Educational | Yes       | 10            | 09/01/20   | 08/31/21 | 10                  |
| 2              | Edward Shanahan | [REDACTED]      | Trustee/Member | Educational | Yes       | 4             | 07/01/17   | 06/30/22 | 0                   |
| 3              | Seymour Fliegel | [REDACTED]      | Trustee/Member | Educational | Yes       | 10            | 08/01/11   | 07/31/22 | 5, 6, 1, 2, 3, 4, 5 |

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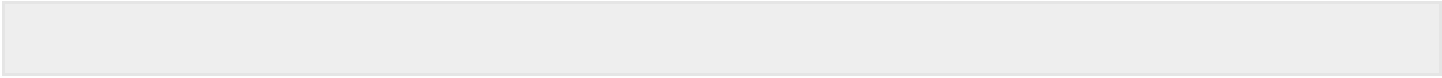
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Financial Statements with Reports of  
Independent Certified Public  
Accountants

Icahn Charter School 7

June 30, 2022 and 2021





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GRANT THORNTON LLP  
186 Wood Ave. S., 4th Floor  
Iselin, NJ 08830

D +1 732 516 5500  
F +1 732 516 5502

## REPORT OF INDEPENDENT CERTIFIED PUBLIC ACCOUNTANTS

To the Board of Directors of:  
Icahn Charter School 7

### Opinion

We have audited the financial statements of Icahn Charter School 7 (the "Charter School"), which comprise the statements of financial position as of June 30, 2022 and 2021, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Charter School as of June 30, 2022 and 2021, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

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## Icahn Charter School 7

## STATEMENT OF FUNCTIONAL EXPENSES

Year ended June 30, 2022

|  | Program Services     |                      |                     | Management<br>and General | 2022<br>Total       |
|--|----------------------|----------------------|---------------------|---------------------------|---------------------|
|  | Regular<br>Education | Special<br>Education | Total               |                           |                     |
| Personnel service costs                          |                      |                      |                     |                           |                     |
| Administrative staff personnel                   | \$ 196,994           | \$ -                 | \$ 196,994          | \$ 395,722                | \$ 592,716          |
| Instructional personnel                          | 2,301,976            | 65,505               | 2,367,481           | -                         | 2,367,481           |
| Non-instructional personnel                      | -                    | -                    | -                   | 235,116                   | 235,116             |
| <b>Total personnel service costs</b>             | <b>2,498,970</b>     | <b>65,505</b>        | <b>2,564,475</b>    | <b>630,838</b>            | <b>3,195,313</b>    |
| Fringe benefits and payroll taxes                | 549,861              | 5,011                | 554,872             | 52,836                    | 607,708             |
| Retirement                                       | 45,492               | 3,275                | 48,767              | 27,100                    | 75,867              |
| Legal service                                    | 5,522                | -                    | 5,522               | 1,208                     | 6,730               |
| Accounting/audit services                        | 25,839               | 2,991                | 28,830              | 6,306                     | 35,136              |
| Other purchased/professional/consulting services | 55,530               | -                    | 55,530              | 1,817                     | 57,347              |
| Building and land rent/lease                     | 193,166              | 22,357               | 215,523             | 47,146                    | 262,669             |
| Repairs and maintenance                          | 27,754               | 60                   | 27,814              | 1,449                     | 29,263              |
| Insurance  | 66,543               | -                    | 66,543              | 14,556                    | 81,099              |
| Supplies/materials                               | 237,149              | 18,089               | 255,238             | -                         | 255,238             |
| Equipment/furnishings                            | 1,614                | -                    | 1,614               | 338                       | 1,952               |
| Staff development                                | 337,326              | -                    | 337,326             | -                         | 337,326             |
| Marketing/recruitment                            | 13,316               | -                    | 13,316              | 2,913                     | 16,229              |
| Technology                                       | 231,200              | 3,973                | 235,173             | 51,444                    | 286,617             |
| Telephone  | 10,243               | 1,186                | 11,429              | 2,500                     | 13,929              |
| Student services                                 | 257,153              | 17,638               | 274,791             | -                         | 274,791             |
| Office expense                                   | 18,396               | 967                  | 19,363              | 49,284                    | 68,647              |
| Depreciation                                     | 121,026              | 13,627               | 134,653             | 25,447                    | 160,100             |
| Other  | 34,163               | 268                  | 34,431              | 14,999                    | 49,430              |
| <b>Total expenses</b>                            | <b>\$ 4,730,263</b>  | <b>\$ 154,947</b>    | <b>\$ 4,885,210</b> | <b>\$ 930,181</b>         | <b>\$ 5,815,391</b> |

The accompanying notes are an integral part of this financial statement.

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Icahn Charter School 7

NOTES TO THE FINANCIAL STATEMENTS

June 30, 2022 and 2021

NOTE A - NATURE OF OPERATIONS

The Icahn Charter School 7 (the "Charter School") is an educational corporation formed to operate a charter school located in the City of New York, 3.2 (t)-0hartTd [(2)2 23orTd.2 7i( )]TJ 0.002 [.4 Yatel) T T

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NOTES TO THE FINANCIAL STATEMENTS - CONTINUED

June 30, 2022 and 2021

Net Assets with Donor Restriction

Represent net assets which are subject to donor-imposed restrictions whose use is restricted by time and/or purpose. The Charter School's net assets with donor restrictions are all subject to donor-imposed restrictions that require the Charter School to use or expend the gifts as specified, based on purpose or passage of time. The Charter School did not have any such amounts as of June 30, 2022 or 2021.

Net assets with donor restrictions may also include amounts with donor stipulations that the corpus of the gifts be maintained in perpetuity, but allows for the expenditure of net investment income and gains earned on the corpus for either specified or unspecified purposes. The Charter School did not have any such amounts as of June 30, 2022 or 2021.

Revenue

Revenue is recorded on the accrual basis of accounting. The Charter School derives its revenue primarily from state and local capitation from the public school districts based on student enrollment, contributions and grants.

Revenues are reported as increases in net assets without donor restrictions unless use of the related assets is limited by explicit donor-imposed restrictions. Public school district revenues (state and local capitation) received from the New York City Department of Education Office of Charter Schools are recognized over the period earned. Revenue from grants and contracts is recognized as the related expenses are incurred, or services performed, in accordance with the terms of the respective grant or contract agreement. Amounts received in advance are reported as deferred revenue.

The Charter School records contributions of cash and other assets when an unconditional promise to give such assets is received from a donor. Contributions are recorded at the fair market value of the assets received and are classified as either with or without donor restr

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NOTES TO THE FINANCIAL STATEMENTS -

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NOTES TO THE FINANCIAL STATEMENTS - CONTINUED

June 30, 2022 and 2021

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NOTES TO THE FINANCIAL STATEMENTS - CONTINUED

June 30, 2022 and 2021

Included in equipment as of June 30, 2022 and 2021 are assets acquired under capital leases at a cost of approximately \$112,000 and \$120,000 with accumulated depreciation of approximately \$5,500 and \$62,400, respectively.

Depreciation expense totaled approximately \$160,000 and \$154,000 for the years ended June 30, 2022 and 2021, respectively.

NOTE D - RELATED PARTY TRANSACTIONS

Legal services are provided by the Inwood Opportunity LLC (the "Company"), a foundation for which Carl C. Icahn serves as a trustee, at no cost to the Charter School. These amounts have not been reflected as in-kind contributions in the accompanying financial statements, as neither the Charter School nor the Company has a readily measurable or objective basis for determining such amounts. RE LLC Es

NOTES TO THE FINANCIAL STATEMENTS - CONTINUED

June 30, 2022 and 2021

Annual payments due subsequent to June 30, 2022 follow:

Year Ending June 30.

2023  
2024  
2025  
2026  
2027

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SUPPLEMENTARY INFORMATION

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**Dis**  
**or Former Trustee**

**Trustee Name:**

Dr Diane Fellows

**Name of Charter School Education Corporation:**

leahn Charter Schools

1. List all positions held on the education corporation board of trustee, (e.g., chair, vice chair, treasurer, secretary, parent representative)

Trustee of the Board

2. Are you related, by blood or marriage, to any person employed by the school or education corporation?

Yes  No

If Yes, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

3. Are you related by blood, or marriage, or legal adoption to any student currently enrolled in a school operated by the education corporation?

Yes  No

If Yes, please describe the nature of your relationship and if the student could benefit from your participation.

4. Are you related, by blood or marriage, to a person that could otherwise benefit from your participation as a board member of the education corporation?

Yes  No

If Yes, please describe the nature of your relationship and if this person could benefit from your participation.

5. Are you a past, current, or prospective employee of the charter school education corporation, and/or an entity that provides comprehensive management services ("CMO"), whether for-profit or not-for-profit, which contracts, or may contract, with the charter school or education corporation, or do you serve as an employee, officer, director, or controlling interest in, a business entity that contracts, or does business with, or plans to contract or do business with, the charter school or education corporation, and/or a CMO, whether for-profit or not-for-profit, including but not limited to the lease of real or personal property to the said entities?

Yes  No

If Yes, please provide a description of the position(s) you held, your responsibilities, your salary and your start date.



6. Identify any financial transactions (including any financial transactions) for which you, any of your immediate family members, and/or any persons who you reside with have held or engaged in with the charter school(s) operated by the education corporation during a term of your service on the Board, and in the six months prior to such service. If there has been no such financial transaction, check **None**.

**None**

| Date(s) | Nature of financial interest transaction | Steps taken to disclose a conflict of interest, (e.g., did not vote, did not participate in discussion) | holding interest or engage in relationship to you |
|---------|--|---|---|
|         |  |   |   |

7. Identify each individual, business, partnership, joint venture, association, firm, partnership, franchise holding company, joint stock company, business trust, estate trust, non-profit organization or other organization or group of people doing business with the school(s) and the school(s) and the education corporation and in which such entity, during the time covered by this report, you or your immediate family member(s) or person(s) you reside with has a financial interest or other relationship. If you are an officer, director, trustee or employee of an organization, formally or informally, and/or doing business with the school(s) through a management or consulting agreement, please identify, only the name of the organization, your position in the organization, and the relationship between such organization and the school(s), if there was no financial interest, relationship.

None

| Organization conducting business with the school(s) | Nature of business conducted | Approximate value of the business conducted | Name of Trustee and/or immediate family member or business holding an interest in the organization conducting business with the school(s) and the nature of the interest. | Steps taken to avoid conflict of interest. |
|---|------------------------------|---|---|--|
|   |                              |   |   |  |



Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name:

EDWARD J. SHANAHAN

Name of Charter School Educational Corporation:

Icahn Charter School, L.P., S.F.S., a California Limited Liability Partnership

1. 1. List all positions held at the educational organization of which you are a trustee ("Board") (e.g., chair, vice chair, treasurer, secretary, or other representative, etc.).

Board member

1. 2. Are you related, by blood or marriage, to any person employed by the school and/or an officer or director?

No

If Yes, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

1. 3. Are you related by blood or marriage, or legal adoption, guardianship to any student currently enrolled in or on a sponsored by your educational corporation?

No

If Yes, please describe the nature of your relationship and if the student could benefit from your participation.

1. 4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a board member of the educational corporation?

No

If Yes, please describe the nature of your relationship and if this person could benefit



from your participation.

1. 5. Are you a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services (CMO), whether for-profit or not-for-profit, which contracts or may contract with the charter school or education corporation; or do you serve as an employee, CMO, or director, or of own a controlling interest in, a business or entity that contracts, or plans to contract or do business with the charter school or CMO, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, lease of real property?

No

If Yes, please provide a description of the position(s) you hold, your responsibilities, your salary and your start date.

1. 6. Identify each individual, business, partnership, franchise, holding company, joint venture, company, trust, trust, real estate trust, holding company, organization, or other organization or entity in which you, any of your immediate family members, and/or any persons who you reside with have held or engaged in with a child or spouse's plan reported by you as a corporation during the time you have served on the Board, and in the six months prior to each year of service. If there has been no such interest or transaction, check None.

X None

| Date(s) | Nature of financial interest/transaction | Steps taken to avoid a conflict of interest (e.g., did not vote, did not participate in discussion) | Name of person, interest, or entity engaged in transaction and relationship to you |
|---------|--|---|--|
|         |  |   |  |

1. 7. Identify each individual, business, partnership, franchise, holding company, joint venture, company, trust, trust, real estate trust, holding company, organization, or other organization or entity in which you, any of your immediate family members, and/or any persons who you reside with have held or engaged in with a child or spouse's plan reported by you as a corporation during the time you have served on the Board, and in the six months prior to each year of service. If there has been no such interest or transaction, check None.



*Edward J. Sluder*

**Signature**

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form, manually signed, scanned PDF

Date July 20, 2022

*last revised 04/2022*

Disclosure of Financial Interests by a Parent or Other Trustee

Trustee Name

*Paula M. [unclear]*

Name of Charter School/Education Corporation

*Casey School Charter Education Corp.*

1. List all positions held by you on this school (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

*Chair*

2. Are you related, by blood or marriage, to any person employed by the school and/or the education corporation?

Yes  No

If Yes, please describe the nature of your relationship and the person's position in detail.

3. Are you related by blood, by marriage, or by adoption/guardianship to any student currently enrolled in a school operated by the education corporation?

Yes  No

If Yes, please describe the nature of the relationship and if the student is currently enrolled in a school operated by the education corporation.



4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a member of the governing corporation?

Yes  No

If Yes, please describe the nature of your relationship and if this person could benefit from your participation.

5. Are you a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO"), whether for-profit, not-for-profit, which contracts, or that contracts with the charter school, or do you serve as an employee, officer, or director of a for-profit or not-for-profit in, a business or entity that contracts, or does business with, or does business with, or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities?

Yes  No

If Yes, please provide a description of the position(s) you hold, your responsibilities, and any other relevant information.

8. Identify each interest/transaction, and provide the requested information as to you, any of your immediate family members, and any persons with whom you have held or engaged in with the corporation's interest during the education corporation during the time you have served on the board of directors six months prior to your service. If there has been no such interest or transaction, check None.

None

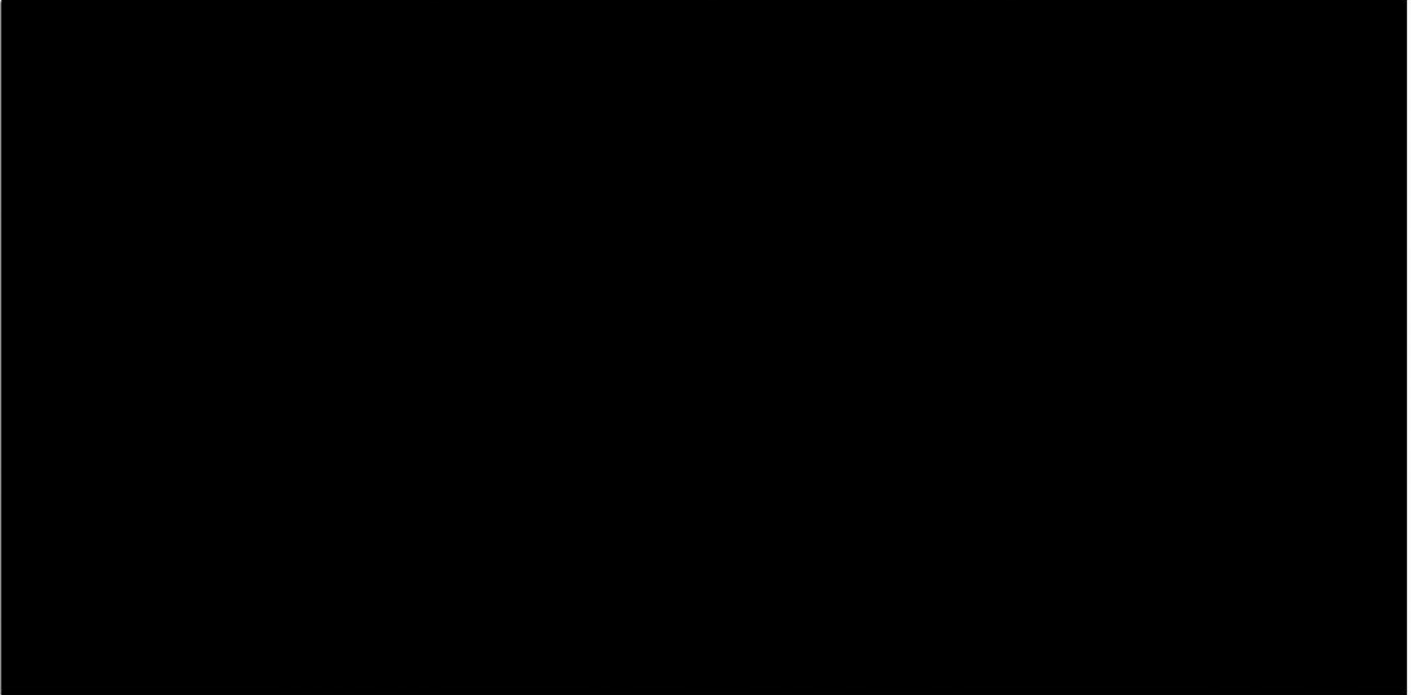
| Date(s) | Nature of financial Interest/ transaction | Steps taken to avoid a conflict of interest (e.g., did not participate in discussion) | Name of person holding interest or appearing in transaction and relationship to you |
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7. Identify each individual business, partnership, franchise holding company, joint stock company, business or real estate trust, non-profit organization, or other organization in which you are doing business who the school(s) operate through the school's education contracting and in which your entity, during the term of your tenure as a trustee, you and/or your immediate family, members(s), or partner(s), you reside with had a financial interest or other relationship. If you are a member, director, officer, or employee, of an organization formally named with the school(s) through a management or services agreement, please identify only the name of the organization, your position in the organization, and the relationship between the organization and the school(s). If there was no financial interest, check None.

None

| Organization conducting business with the school(s) | Nature of business conducted | Approximate amount of business conducted | Name of trustee family member or partner of trustee interest in the organization conducting business with the school(s) and the nature of the interest | State of interest |
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This document is considered a public record and, as such, may be made available to members of the public upon request. Personal contact information provided below will be redacted.



*[Handwritten Signature]* \_\_\_\_\_  
Signature Date

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form manually signed scan to PDF

last revised 04/2022



**Disclosure of Financial Interest by a Current  
or Former Trustee**

Trustee Name:

Karen M. Mather

Name of Charter School Education Corporation:

Teahn Charter School

1. List all positions held in the relevant organization (e.g., Board of Trustees, Board of Directors, etc.)

Financial Committee & Governance Committee

2. Are you related, by blood or marriage, to any person employed by the school and/or education corporation?

Yes  No

If Yes, please describe the nature of your relationship and the person's position, as well as any other responsibilities with the school.

3. Are you related, by blood or marriage, to any individual who is a student currently enrolled in a school operated by the education corporation?

Yes  No

If Yes, please describe the nature of your relationship and if the student could benefit from your participation.

4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a member of the educational corporation?

Yes  No

If Yes, please describe the relationship and if this person or person would benefit from your participation.

5. Are you a past, current, or prospective employee, officer, director, or owner of a charter school, educational corporation, or an entity that provides management services ("EMO"), whether for-profit or not-for-profit, which contracts, or may contract, with the charter school or educational corporation? Do you serve as an employee, officer, or director of, or own a controlling interest in, a business or entity that contracts or does business with, or do you do business with, the charter school or educational corporation, whether for-profit or not-for-profit, including, but not limited to, the lease or rental of personal property to an educational institution?

Yes  No

If Yes, please provide a description of the position(s) you hold, your responsibilities, your salary, and your stock holdings.

6. Identify each interest/transaction (and provide the following requested information that you, any of your immediate family members, direct, any for any persons who you reside with have not engaged in with the charter schools, operated by the education corporation during the time you have served on the Board and in the six months prior to a session, if there has been no subsequent interest or transaction, check the box:

None

| Date(s) | Nature of financial interest/transaction | Steps taken to avoid a conflict of interest (e.g., did you refrain from participating in discussion) | Name of person in interest or engaging in transaction and relationship to you |
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7. Identify each individual, business, corporation, union, association, firm, partnership, franchise holding company, joint stock company, business or trust, estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation and in which such party, during the time of your tenure as a trustee, you or your immediate family member(s) or person(s) you reside with had a financial interest or other relationship. If you are a member, director, officer, or employee of an organization formally or informally connected with the school(s) through a management or services agreement, please identify only the name of the organization, your position in the organization, and the relationship between such organization and the school(s). If there was no financial interest, check "None".

None

| Organization conducting business with the school(s) | Nature of business conducted | Approximate value of the business conducted | Name of trustee, director, officer, or immediate family member or household holding an interest in the organization conducting business with the school(s) and the nature of the interest | Steps taken to avoid conflict of interest |
|---|------------------------------|---|---|---|
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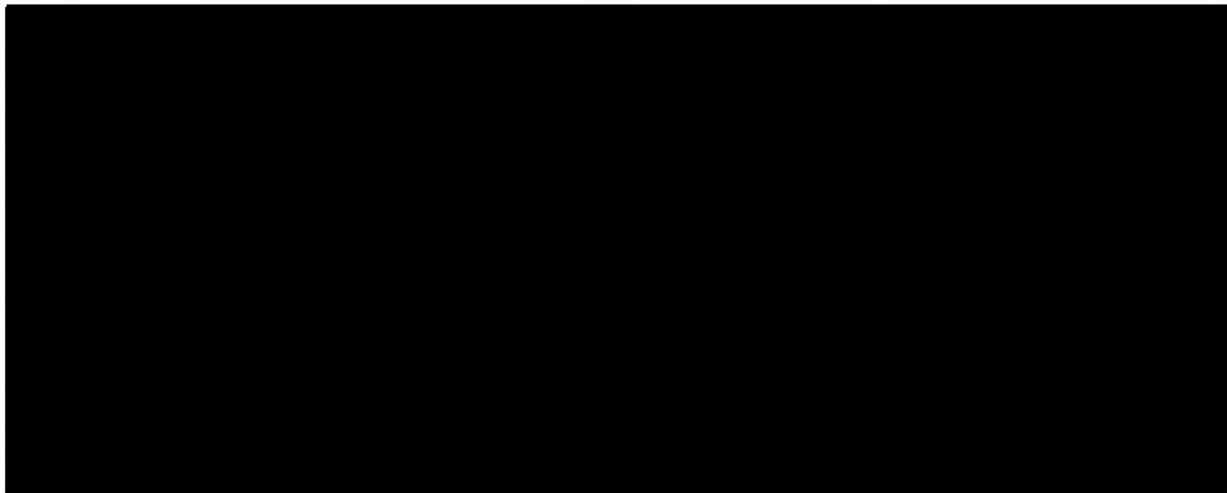
This document is considered a public record and, as such, may be made available to members of the public. If you have any questions regarding this information, please contact the person whose name is listed on this document.

**Business Telephone:**

\_\_\_\_\_

**Business Address:**

\_\_\_\_\_



*[Handwritten Signature]*

**Signature**

*[Handwritten Date]*

**Date**

Acceptable signatures to file include:

- Digitally signed PDF
- Print form, manually sign, scan

last revised 04/2020

Disclosure of Financial Interest by a Current or Former Trustee

Trustee name:

Robert Sanchez

Name of Charter School/Charter Education Corporation:

Iconia Charter School 11234567

1. List all positions held on the education corporation board of trustees or board (e.g., chair, vice-chair, treasurer, secretary, board representative, etc.).

Trustee

2. Are you related by blood or marriage to any person who reports to the school, and/or education corporation?

Yes  No

If Yes, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

3. Are you related by blood, or marriage, or legal adoption/guardianship to any student currently enrolled in a school operated by an education corporation?

Yes  No

If Yes, please describe the nature of your relationship and how the student could benefit from your participation.

4. Are you related by blood or marriage to an agent, his or her spouse, or otherwise benefit from your participation as a board member of the Corporation?

Yes  No

If Yes, please describe the relationship you benefit from your participation

5. Are you a past, current, or prospective employee of the United States, non-education corporation, and/or an entity that provides commercial or management services (CMO), whether for-profit or not-for-profit, which contract, or may contract, with the United States or educational institution, or do you serve as an employee, officer, or director of, or own a controlling interest in, a business entity that contracts, or does business with, or plans to contract or do business with the United States or educational institution, or CMO, whether for-profit or not-for-profit, including but not limited to the lease of real or personal property to the United States?

Yes  No

If Yes, please provide a description of the position(s) you hold, your responsibilities, yes, your salary and your signature.

6. Identify each interest or transaction (a) and provide the requested information that you, any of your immediate family members, and/or any persons to whom you relate with have had an ongoing relationship with the contractor(s) plus queried by the education corporation during the time you have served on the Board and in the six months prior to such service. If there has been no such interest or transaction, check **None**.

**None**

| Date(s) | Nature of financial interest / transaction | Steps taken to avoid a conflict of interest (e.g., did not vote, did not participate in discussion) | Name of person or organization with whom interest or transaction related | Relationship to you |
|---------|--|---|--|---------------------|
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7. Identify each individual, business, corporation, union, association, firm, ..... partnership, financial holding company, limited liability company, business of real estate trust, non-profit organization, or other organization or group of people doing business with the school(s), operated by, the education corporation and in which such entity, during the time of your tenure as a trustee or director of your immediate family member(s) or household holding an interest in the organization conducting business with the school(s) through a management or services agreement, lease, financial interest or other relationship. If you are a member, director, officer or employee of an organization normally partnered with and/or doing business with the school(s) through a management or services agreement, please identify only the name of the organization, your position in the organization and the relationship with the school(s) or organization and the school(s). If there was no financial interest, check **NONE**.

**NONE**

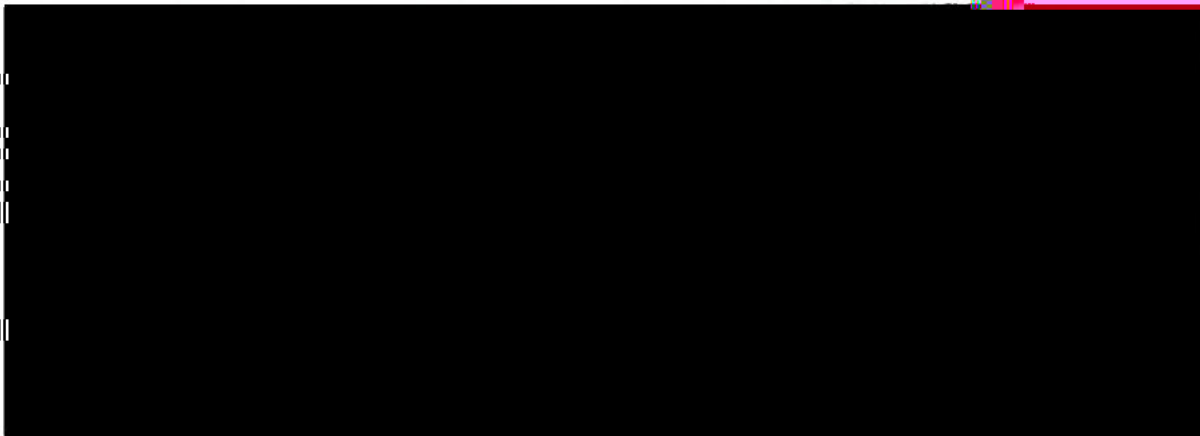
| Organization conducting business with the school(s) | Nature of business conducted | Approximate value of the business conducted | Name of trustee and/or immediate family member or household holding an interest in the organization conducting business with the school(s) and the nature of the interest |
|---|------------------------------|---|---|
|   |                              |   |   |

This document is considered a public record, as such, may be made available to members of the public upon request under the Freedom of Information Law. The personal contact information of the individual(s) listed below is not to be disseminated.

**Business Telephone:**

\_\_\_\_\_

**Business Address:**



*[Handwritten Signature]*      *[Handwritten Date]*

**Signature**

**Date**

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form, manually sign, scan to PDF

*last revised 04/2022*

