

990 Long Form Questionnaire

This information requested is in addition to the initial information submitted to us in the financial organizer and will be considered a part of the entire organizer of information and subject to the same acknowledgement of accuracy signature. Please initial here: _____

If you do not understand the question or are unclear as to the answer, check the help box beside the question and we will discuss it with you.

<u>HELP</u>	1	Provide the number of officers, directors, and trustees permitted to vote on organization business at board meetings.			
	2	Are any officers, directors, trustees, or key employees, or highest compensated employees, or highest compensated professional and other independent contractors related to each other through family or business relationships? If yes, please attach the following: <ul style="list-style-type: none"> Identify the individuals. Explain the relationship(s) 	YES	NO	N/A
	3	Do any officers, directors, trustees, or key employees, or highest compensated employees, or highest compensated professional and other independent contractors receive compensation from any other organizations, whether tax exempt or taxable, that are related to this organization through common supervision or common control? If yes, please attach the following. <ul style="list-style-type: none"> Identify the individuals. Explain the relationship(s) 	YES	NO	N/A
	4	Does the organization have a written conflict of interest policy? If yes, attach a copy. <ul style="list-style-type: none"> Are officers, directors/trustees and key employees required to disclose interests that could give rise to conflicts? Does the organization monitor and enforce compliance with the conflict of interest policy? How often does the organization review its conflict of interest policy? _____ 	YES	NO	N/A
	5	During the tax year, did any person who is a current or former officer, director, trustee, or key employee: <ul style="list-style-type: none"> Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another organization or business (individually or collectively with other officers, directors/trustees, or key employees)? Have a family member who had a direct or indirect business relationship with the organization? 	YES	NO	N/A

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			YES	NO	N/A
		<ul style="list-style-type: none"> Serve as an officer, director, trustee, key employee, partner, or member of an organization or business (or shareholder of a professional corporation) doing business with the organization? 			
	6	Does the organization have members or stockholders? <ul style="list-style-type: none"> Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body (board)? Are any decisions of the governing body subject to approval by members, stockholders, or other persons? 	YES	NO	N/A
	7	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	YES	NO	N/A
	8	Did the organization document (keep minutes of) the meetings held during the year by the following: <ul style="list-style-type: none"> The governing body (board)? Each committee with the authority to act on behalf of the governing body? Provide a copy of all meeting minutes for the year. 	YES	NO	N/A
	9	Indicate the total number of employees (issued a W-2).			
	10	Indicate the total number of independent contractors (issued a 1099).			
	11	Indicate the total number of volunteers.			
	12	Did the organization compensate (in any form) other individuals that were not issued a W-2 or 1099?	YES	NO	N/A
	13	Did the organization maintain employees, or agents outside of the U.S.?	YES	NO	N/A
	14	Did the organization file Form 1096, Annual Summary and Transmittal of U.S. Information Returns (used to report 1099s issued)? <ul style="list-style-type: none"> If yes, enter the number reported in Box 3 on Form 1096 _____ Were any Forms W-2G included (reporting of gambling earnings)? If yes, how many? _____ Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? 	YES	NO	N/A
	15	Did the organization file Form W-3, Transmittal of Wage and Tax statements (used to report W-2s issued), for the calendar year ending with or within the year covered by this return? <ul style="list-style-type: none"> If yes, how many employees were reported? _____ Did the organization file all required federal employment tax returns (such as 941s)? 	YES	NO	N/A

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	16	Does the organization use any of the following methods to establish the compensation of the officers, directors/trustees, and employees? <ul style="list-style-type: none"> • Compensation committee • Independent compensation consultant • Form 990 of other organizations • Written employment contract • Compensation survey or study • Approval by the board or compensation committee. 	YES	NO	N/A
	17	Did the organization pay to/for or reimburse any of the following on behalf of officers, directors/trustees, or employees? <ul style="list-style-type: none"> • First-class or charter travel • Travel for companions • Tax indemnification and gross-up payments • Discretionary spending account • Housing allowance or residence for personal use • Payments for business use of personal residence • Health or social club dues or initiation fees • Personal services • Cell or home phone services • Life insurance • Health Insurance • Education expenses • Other expense accounts 	YES	NO	N/A
	18	Did the organization pay any special individual deferred compensation after active employment? If yes, provide details.	YES	NO	N/A
	19	During the year, did officer, director/trustee, or employee: <ul style="list-style-type: none"> • Receive a severance payment or change of control payment? • Participate in, or receive payment from, a supplemental nonqualified retirement plan? • Participate in, or receive payment from, an equity-based compensation arrangement? • Receive any non-fixed payments, such as bonuses? 	YES	NO	N/A
	20	Did the organization pay or accrue any compensation contingent on the revenues of the organization or any related organization or on some other type of commission basis?	YES	NO	N/A
	21	During the past year, has your organization received any notices, warnings or penalties from the IRS? If so, provide copies.	YES	NO	N/A
	22	Did the organization become aware during the year of a significant loss or transfer of the organization's assets (such as theft, embezzlement, the intended or unintended transfer assets to another organization, business or individual, etc.)?	YES	NO	N/A
	23	Does the organization have a written whistleblower policy? If so, provide a copy.	YES	NO	N/A

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	24	Does the organization have a written document retention and destruction policy? If so, provide a copy.	YES	NO	N/A
	25	Does the organization have local chapters, branches, or affiliates? <ul style="list-style-type: none"> If yes, does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those organization? If so, provide copies. 	YES	NO	N/A
	26	Did the organization receive more than \$25,000 in non-cash contributions?	YES	NO	N/A
	27	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions?	YES	NO	N/A
	28	Did the organization solicit any contributions or gifts that were not tax deductible?	YES	NO	N/A
	29	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75? (For example, "For your love gift of \$100, we will send you this replica painting.")	YES	NO	N/A
	30	Did the organization sell, exchange, or otherwise dispose of tangible property valued at over \$500?	YES	NO	N/A
	31	Did the organization receive any contributions of intellectual property (patents, copyrights, trademarks, software, know-how, trade secrets, etc.)?	YES	NO	N/A
	32	Did the organization receive any contributions of cars, boats, airplanes, and other vehicles?	YES	NO	N/A
	33	Did the organization, during the year, pay premiums, directly or indirectly for any life insurance, annuity or endowment contract?	YES	NO	N/A
	34	Did the organization own 100% of another organization or business?	YES	NO	N/A
	35	Was the organization related to any other organization or business?	YES	NO	N/A
	36	§ 501(c)(3) organizations. Did the organization make any transfers of assets to an exempt non-charitable related organization (any § 501(c) organization other than a § 501(c)(3) ?	YES	NO	N/A
	37	Did the organization conduct more than 5% of its activities through another organization or business?	YES	NO	N/A
	38	Did the organization receive any contributions to be distributed to an individual or group of individuals?	YES	NO	N/A
	39	Does the organization have a charitable remainder trust?	YES	NO	N/A

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	40	<p>§ 501(c)(3) and other sponsoring organizations maintaining donor advised funds.</p> <ul style="list-style-type: none"> Did the organization distribute any funds to an individual, estate, partnership, association, company or corporation? 	YES	NO	N/A
	41	<p>Will a completed copy of the Form 990 be provided to the organization's governing body (board) before it is filed?</p> <ul style="list-style-type: none"> If yes, describe the process, if any, the organization uses to review the Form 990. 	YES	NO	N/A
	42	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable organization or business during the year?	YES	NO	N/A
	43	<p>Does the organization make a copy of the following documents available to the public?</p> <ul style="list-style-type: none"> Tax exemption application (1023/1024) Annual Tax Returns (990/990-EZ) Governing Documents (Articles, Bylaws) Conflict of Interest Policy Financial Statements If yes, describe how these are made available (organization's website, another's website, upon Request, other). 	YES	NO	N/A
	44	<p>Were the organization's financial statements compiled or reviewed by an independent accountant?</p> <ul style="list-style-type: none"> Were the organization's financial statements audited by an independent accountant? Does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? 	YES	NO	N/A
	45	Was the organization required to undergo an audit as a result of a financial award?	YES	NO	N/A
	46	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures?	YES	NO	N/A
	47	Did the organization maintain collections of works of art, historical treasures, or other similar assets?	YES	NO	N/A
	48	Did the organization serve as a custodian for amounts not listed on the balance sheet?	YES	NO	N/A
	49	Did the organization provide credit counseling, debt management, credit repair, or debt negotiation services?	YES	NO	N/A

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	50	<ul style="list-style-type: none"> • Did the organization have a tax-exempt bond issue with an outstanding principle amount of more than \$100,000 as of the last day of the year that was issued after December 31, 2002? • Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? • Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defense any tax-exempt bonds? • Did the organization act as an “on behalf of” issuer for bonds outstanding at any time during the year? 	YES	NO	N/A
	51	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value? If yes, provide a detailed list indicating the value of each item and whether it is included in revenue and expense.	YES	NO	N/A
	52	Does the organization hold any land, buildings or equipment for investment purposes? If yes, provide a schedule listing of the following for each asset: <ul style="list-style-type: none"> • Description. • Cost or other basis. • Accumulated depreciation, if any. 	YES	NO	N/A
	53	Does the organization hold securities or other investments (other than land, buildings and equipment)?	YES	NO	N/A
	54	Did the organization receive contributions or grants that contributors or grantors have designated as payable for one or more future years? If yes, provide a schedule describing each contribution or grant and indicate the total amount of each item and the amount applicable to each future period.	YES	NO	N/A
	55	Do you have policies in place regarding the use of the assets? If so, provide a copy providing the following information: <ul style="list-style-type: none"> • Who has access to the organization’s assets (bank accounts, vehicles, equipment, etc.)? • Who keeps the records of assets the organization? • How often is the bank statement(s) reconciled and by whom? • How often does the board review the financial statements of the organization? 	YES	NO	N/A

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	56	Did your organization raise funds through any of the following activities: <ul style="list-style-type: none"> Mail solicitations Email solicitations Phone solicitations In-person solicitations Solicitations of non-government grants Solicitations of government grants Special fundraising events 	YES	NO	N/A																																																																		
	57	Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees) or business in connection with professional fundraising services? <ul style="list-style-type: none"> If yes, list the ten highest paid individuals or businesses (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Use the chart below as a guideline when submitting the information. 	YES	NO	N/A																																																																		
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Name of individual or entity(fundraiser)</th> <th style="width: 20%;">Activity</th> <th style="width: 15%;">Did fundraiser have custody or control of contributions?</th> <th style="width: 15%;">Gross receipts from activity</th> <th style="width: 15%;">Amount paid to (or retained by) fundraiser listed</th> <th style="width: 15%;">Amount paid to (or retained by) organization</th> </tr> <tr> <th></th> <th></th> <th style="text-align: center;">Yes No</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>					Name of individual or entity(fundraiser)	Activity	Did fundraiser have custody or control of contributions?	Gross receipts from activity	Amount paid to (or retained by) fundraiser listed	Amount paid to (or retained by) organization			Yes No																																																									
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	58	Attach a list of all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing.																																																																					