

Rec'd 11/14/09

Internal Revenue Service  
P.O. Box 2508 - Room 4511  
Cincinnati, Ohio 45201

Department of the Treasury

Date: November 12, 2009

Andreas Killian Descendents  
Historical Association  
16310 Barcica Lane  
Cornelius, NC 28031-8720

Employer Identification Number:  
80-0427367

Person to Contact - Group #:  
Angie Bender - 7828  
ID# 0395223

Contact Telephone Numbers:  
513-263-4492 Phone  
513-263-4590 Fax

Response Due Date:  
December 3, 2009

Dear Sir or Madam:

We need more information before we can complete our consideration of your application for exemption. Please provide the information requested on the enclosure by the response due date shown above. Your response must be signed by an authorized person or an officer whose name is listed on your application. Also, the information you submit should be accompanied by the following declaration:

*Under penalties of perjury, I declare that I have examined this information, including accompanying documents, and, to the best of my knowledge and belief, the information contains all the relevant facts relating to the request for the information, and such facts are true, correct, and complete.*

To facilitate processing of your application, please attach a copy of this letter to your response. This will enable us to quickly and accurately associate the additional documents with your case file.

If we do not hear from you within that time, we will assume you no longer want us to consider your application for exemption and will close your case. As a result, the Internal Revenue Service will treat you as a taxable entity. If we receive the information after the response due date, we may ask you to send us a new application.

In addition, if you do not respond to the information request by the due date, we will conclude that you have not taken all reasonable steps to complete your application for exemption. Under Code section 7428(b)(2), you must show that you have taken all the reasonable steps to obtain your exemption letter under IRS procedures in a timely manner and exhausted your administrative remedies before you can pursue a declaratory judgment. Accordingly, if you fail to timely provide the information we need to enable us to act on your application, you may lose your rights to a declaratory judgment under Code section 7428.

Letter 1312

Andreas Killian Descendents Historical Association  
80-0427367

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

*Angie Bender*

Angie Bender  
Exempt Organizations Specialist

Enclosure: Information Request

Additional Information Requested:

1. Please read the Penalties of Perjury statement on page one and then sign and date below, indicating that you agree to the Declaration.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

Your application states that the organization will provide genealogical research. Please provide the following information about this activity:

- a. What percentage of the organization's overall time is spent doing genealogical research for individuals?
- b. Is research done only for members of the organization? If the organization also does research for outside individuals, please state what percentage of the research is done for members of the organization.
- c. Provide a schedule showing the types of services provided and the fees associated with each service.
- d. Does the organization also educate individuals on research techniques, information sources, etc.? If so, please explain this activity in detail.
- e. How are the results of the genealogical research disseminated? Does the organization only disseminate the results to the individual who requested the information, or is the information made available to the general public?
- f. If genealogical research is made available to the general public, please explain this activity. For example, does the organization provide displays of genealogical information in the historical society or library; publish books or other materials including this information, etc.?

Andreas Killian Descendents Historical Association  
80-0427367

3. Enclosed is a copy of information we downloaded from your website. Since we have provided a copy of this information to you, it is available for public inspection as part of your exemption application.

If the enclosed information does not belong to you, please contact the person whose name and telephone number are shown in the heading of this letter.

4. Please explain how the annual reunion fulfills an exempt purpose under IRC section 501(c)(3).
5. Please provide more information regarding the cemetery maintenance, DNA Research and sale of books. Please explain how each of these activities fulfills an exempt purpose under IRC section 501(c)(3).
6. Provide the following information regarding your scholarships:
  - a. The names and qualifications of the selection committee members.
  - b. State if related parties of the board will be eligible to receive scholarships, if yes, state how the selection will be determine in an unbiased manner.
  - c. Provide the criteria that will be used to determine if an applicant will qualify for a scholarship.
  - d. Provide a copy of the application, if available.
  - e. Describe what procedures the organization has in place to monitor the funds disbursed and procedures if funds are not used for the purposes intended.
  - f. State how many scholarships will be provided each year.
  - g. How many applicants will be eligible to apply? Will only descendents of the Killian be able to apply? Please explain fully.
7. Will all funds come from one family? Please explain.
8. Your financial data does not reflect the income and costs on how you will provide the activities of the organization. Please provide updated financial information to reflect the activities. We are enclosing page 9 of the application to be completed and have an officer initial and date the page.

Note: Please include all income and expenses that will be related to all of the activities.

Andreas Killian Descendents Historical Association  
80-0427367

PLEASE DIRECT ALL CORRESPONDENCE REGARDING YOUR CASE TO:

US Mail:

Internal Revenue Service  
Exempt Organizations  
P. O. Box 2508  
Cincinnati, OH 45201  
ATT: Angie Bender  
Room 4511, Group 7828

Street Address:

Internal Revenue Service  
Exempt Organizations  
550 Main St, Federal Bldg.  
Cincinnati, OH 45202  
ATT: Angie Bender  
Room 4511, Group 7828

**Part IX Financial Data**

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

**A. Statement of Revenues and Expenses**

	Type of revenue or expense	Current tax year	3 prior tax years or 2 succeeding tax years			(e) Provide Total for (a) through (d)
		(a) From..... To .....	(b) From..... To .....	(c) From..... To .....	(d) From..... To .....	
<b>Revenues</b>	<b>1</b> Gifts, grants, and contributions received (do not include unusual grants)					
	<b>2</b> Membership fees received					
	<b>3</b> Gross investment income					
	<b>4</b> Net unrelated business income					
	<b>5</b> Taxes levied for your benefit					
	<b>6</b> Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
	<b>7</b> Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)					
	<b>8</b> Total of lines 1 through 7					
	<b>9</b> Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)					
	<b>10</b> Total of lines 8 and 9					
	<b>11</b> Net gain or loss on sale of capital assets (attach schedule and see instructions)					
	<b>12</b> Unusual grants					
	<b>13</b> Total Revenue Add lines 10 through 12					
<b>Expenses</b>	<b>14</b> Fundraising expenses					
	<b>15</b> Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
	<b>16</b> Disbursements to or for the benefit of members (attach an itemized list)					
	<b>17</b> Compensation of officers, directors, and trustees					
	<b>18</b> Other salaries and wages					
	<b>19</b> Interest expense					
	<b>20</b> Occupancy (rent, utilities, etc.)					
	<b>21</b> Depreciation and depletion					
	<b>22</b> Professional fees					
	<b>23</b> Any expense not otherwise classified, such as program services (attach itemized list)					
	<b>24</b> Total Expenses Add lines 14 through 23					

December 2, 2009

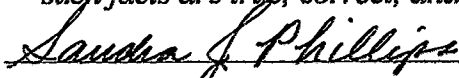
Ms. Angie Bender  
Exempt Organization Specialist  
INTERNAL REVENUE SERVICE  
P.O. Box 2508  
Room 4511, Group 7828  
Cincinnati, OH 45201

Re: Information Request

Dear Ms. Bender:

This letter serves as my response to your request for additional information regarding our Association's tax-exempt application. I have used your question format to respond.

1. As requested, I include my signature indicating that I agree with the Penalties of Perjury Statement: *Under penalties of perjury, I declare that I have examined this information, including accompanying documents, and, to the best of my knowledge and belief, the information contains all the relevant facts relating to the request for the information, and such facts are true, correct, and complete.*

  
\_\_\_\_\_

Sandra J. Phillips, Treasurer

12/02/2009

Date

2. **Your application states that the organization will provide genealogical research. Please provide the following information about this activity:**
  - a. **What percentage of the organization's overall time is spent doing genealogical research for individuals?** To our best estimation, the members of the organization spend about 50% of the organization's overall time on genealogical research and documentation for individuals.
  - b. **Is research done only for members of the organization?** We provide research for anyone who inquires, regardless of their relationship to Andreas Killian. **If the organization also does research for outside individuals, please state what percentage of the research is done for members of the organization.** Our expertise and research is focused on Andreas Killian, his descendants, affiliated families and Colonial Killians (Kilians, Killions, etc.), who are not proven relations of Andreas Killian; North Carolina history particularly in the counties of Tryon, Anson, Lincoln, Mecklenburg, Catawba, Rowan, Cabarrus, and Gaston. As a result, we estimate that 75% of the inquiries, and thus research, may be for descendants of Andreas Killian.
  - c. **Provide a schedule showing the types of services provided and the fees associated with each service.** Our genealogical research encompasses all available sources. We confirm facts. We review all available databases and sources. Several members of the organization travel to state archives, county courthouses, historical association libraries and museums as part of the organization's research. We provide copies of wills, court records, bible records, old pictures, land records, census records, birth and death records, and early marriage records. If the courthouse, for example, charges a copy fee, the person inquiring may reimburse the researcher. We do not charge a fee associated

with any service. We publish research findings or information of interest through our twice yearly newsletter, and archive all newsletters on our website. Our website houses research findings and resource links as well as information of interest. We pay for any costs associated with these services from donations. We have published one book and are selling the book at an amount equal to it's cost plus postage. We donated 15 books to Historical and Genealogical Associations, Historians, and Libraries. We provide a 3-day annual "reunion" meeting with speakers and genealogical workshops as well as tours of local historical sites and museums. We pay for any costs associated with this event from donations.

- d. **Does the organization also educate individuals on research techniques, information sources, etc? If so, please explain this activity in detail.** Yes, we educate individuals through the course of any inquiry as to what information can be useful and where to find this information. Many times the referral will be to public records and their location or to a book or the author of a book now out of print. We also educate through our speakers and workshops at the annual "reunion" meeting, newsletter articles and our recently published book.
  - e. **How are the results of the genealogical research disseminated? We have published our first book this year. We report news in our newsletter, on our website, and at the annual "reunion" meeting. We may answer an inquiry in person, by phone or via email. Does the organization only disseminate the results to the individual who requested the information, or is the information made available to the general public?** Information that is of a personal nature or poses a threat of identity theft is not disseminated. All other information is made available to the general public.
  - f. **If genealogical research is made available to the general public, please explain this activity. For example, does the organization provide displays of genealogical information in the historical society or library; publish books or other materials including this information, etc.?** We recently published a book for some of the information. We donated this book to several historical societies and libraries for public access. We have a newsletter published twice a year with information and archive all of those on our website for public access. Additional information is available on our website, which is accessible by anyone with internet access. We provide computer workshops and databases at the annual "reunion" meeting as well as educational lectures to anyone that attends. We invite the public to attend the annual "reunion" meeting through announcements in local papers, on Internet forums, and local bulletin boards.
3. **Enclosed is a copy of information we downloaded from your website. Since we have provided a copy of this information to you, it is available for public inspection as part of your exemption application.** Yes, the attached copy represents the website of our association.
  4. **Please explain how the annual reunion fulfills an exempt purpose under IRC section 501(c)(3).** The annual "reunion" meeting is a 3 day event for the purpose of business and education with social interaction during meals. On Friday evening, we have a guest lecturer who discusses a topic usually historical in nature. On Saturday morning, tours are usually given of local historical sites such as the Catawba County Historical Museum, Murray's Mill (an historic working mill), the 200 year old church at Old St. Pauls, and historic cemetery tours. Saturday afternoon is usually a genealogy lecture and workshop.

At the workshop, computers and databases among other historical information and documents is made available to all attendees. After the workshop, the annual Business Meeting is held. Officers are elected and the Treasury Report is presented and discussed as well as any other items of business. After dinner, a night cemetery photography class is given in a local historic cemetery where the tombstone, normally illegible from wear, can be clearly read using light and shadow. On Sunday afternoon, another guest speaker will discuss an historical topic of interest.

An example of a lecturer at the annual "reunion" meeting is a Professional Genealogist who spoke on where to find County, State, and National archival documents and the value of that information. Another example is a Genetic Genealogist who gave an informative and in depth presentation on DNA and it's impact on history.

- 5. Please provide more information regarding the cemetery maintenance, DNA Research and sale of books. Please explain how each of these activities fulfills an exempt purpose under IRC Section 501(c)(3).** All of these are incorporated into our goals of educating the public of our colonial Ancestor and affiliated families and the preservation of this heritage.

Historical sites such as cemeteries where gravesites as old as 200 years (some written in colonial German) are in dire need of maintenance or repair. We tour these historical cemeteries as a means to educate reunion attendees of the life and times of the colonial families therein buried. People from all over the country come to Lincoln and Catawba counties to visit these historic cemeteries. Often they will contact members of the Association for assistance in locating specific historic tombstones. In some cases where historic tombstones have been damaged or are missing, the Association's goal is to afford the ability to repair or replace and therefore preserve these historic sites.

We are using DNA research to support oral and written history as well as supporting research where no paper trail exists. In the 1800's, wooden courthouse structures and there historic documents were often lost to fire. DNA is yet another tool in genealogical research to track migratory patterns in colonial families. An example of this tool is where we believe Andreas Killian had 2 wives, one who came from Germany and one he married in America in the mid 1700s. We are trying to locate the female line member of his daughter born in Germany and the female line member of his youngest daughter born in North Carolina. The mitochondrial DNA comparison of these 2 living women could show that they came from the same mother, which would dispel the 2-wife theory. Colonial women are extremely difficult to locate and prove.

The sale of our books is a method of disseminating historical research done by the organization. Our first book has created great interest in learning and therefore, preserving the heritage of our colonial ancestors and their neighbors. To date, our book has won the recognition of the Old Buncombe County Genealogical Association in Buncombe County, North Carolina, as an outstanding and well-produced record of Andreas Killian descendants there. I have provided a copy of the book to show the depth of genealogical and historical research the association has done.

- 6. Provide the following information regarding your scholarships:**

**a. The names and qualification of the selection committee members.** The Selection Committee shall consist of the President, Vice President, Secretary, Treasurer, Project Director and Board of Directors.



- b. State if related parties of the board will be eligible to receive scholarships, if yes, state how the selection will be determined in an unbiased manner.** In the event that a member of the Selection Committee shall be a lineal or lateral relative within 3 generations of a qualifying applicant, that member shall be excluded from the selection process and if needed for a quorum, replaced by another member of the Board.
- c. Provide the criteria that will be used to determine if an applicant will qualify for a scholarship.** The selection will be based on a competitive nature from the school records, ACT/SAT scores, personal essay and outside activities and interests. A qualifying applicant will be defined as those students who will make academic contributions such as research papers; physical improvements; creating new physical structures; assist historical libraries, museums, historical churches and cemeteries; restoration and upkeep of public markers or monuments or assist other family organizations whose purpose is historical or educational, as approved by the Selection Committee, and who plan to attend vocational/technical schools (college level), junior colleges, colleges or universities and maintain a GPA of 2.0 and above. All other candidates will be considered as they relate to furthering the purpose of the association as approved by the Selection Committee. First, second, third, and fourth year attendees of vocational/technical schools, junior colleges, and colleges and universities may qualify. High school seniors who have been accepted to an institution of higher learning, as previously mentioned, are eligible. To qualify for the award, the High School student must have taken the American College Test (ACT) or the Scholastic Assessment Test (SAT), (but not for vocational/technical). All qualifying applicants must submit the application on the proper Association Application Form by the stated due date. Any application missing necessary information will not qualify for consideration.
- d. Provide a copy of the application, if available.** A draft sample application is attached.
- e. Describe what procedures the organization has in place to monitor the funds disbursed and procedures if funds are not used for the purposes intended.** Scholarship award checks will be forwarded directly to the school selected by the recipient after the Selection Committee receives proof of "acceptance". Should the recipient be unable to attend the school, or for any reason fail to complete the award school year, a refund will be required and monies returned to the scholarship fund for future awards.
- f. State how many scholarships will be provided each year.** Upon attainment of financial goals established by the Board, at least one scholarship will be provided each year, in an amount to be determined by the Board.
- g. How many applicants will be eligible to apply? Will only descendants of the Killian be able to apply? Please explain fully.** Any number of candidates can apply and should be descendants of Andreas Killian except in the case of a college level research thesis or doctoral work project dedicated exclusively to Andreas Killian or his descendants by a non-descendant.
- 7. Will all funds come from one family? Please explain.** No, we accept donations from anyone, regardless of their relationship to Andreas Killian. Historically, we have received funds from a large group of various individuals from all over the United States. To illustrate our breadth:

- In our largest database of family members (which is not a complete list) there are 25,416 actual descendants of Andreas Killian and 12,637 spouses. Of those approximately half are living.
  - Currently, we mail approximately 350 newsletters to 34 states plus Washington, DC.
  - Currently, we post the newsletter on the website and notify 250 email addresses that the newsletter is available on line.
  - Our website receives approximately 400 unique visitors per month, our only measure at how many people are using the site. A unique visitor is defined as a unique IP address used to connect to the website within a 24 hour period.
  - As Treasurer, I deposited approximately 100 checks this year as well as cash collected at the annual "reunion" meeting. Approximately 200 people attended all or part of the 3-day event in 2009.
8. **Your financial data does not reflect the income and costs on how you will provide the activities of the organization. Please provide updated financial information to reflect the activities. We are enclosing page 9 of the application to be completed and have an officer initial and date the page.** The association has been meeting informally for 75 years. We rely solely on donations. The activities in which we participate will depend on the funds available in the Treasury. We have in the past afforded the costs of the Website, Newsletter, the annual "reunion" meeting and the publication of our first book. As we reach financial goals, we plan to implement additional activities.
- a. **Note: Please include all income and expenses that will be related to all of the activities.** Attached you will find a completed Page 9 of the application which includes the Treasurer's Report for the year ending August 31, 2009. Please note the Board has not yet met to review and approve this report. Also included is a projected budget for the successive years ending August, 2010 and August, 2011. Please note there was unique activity surrounding the publication of our book in 2009, which is reflected in the income and disbursements of that year. I have attached copies of our traditional Treasurer's Report to assist you. To further explain our budgetary process, I have itemized each activity with a brief summary of our activity relating to each item:

Current Annual Activity Expenses:

1. Website: Each year we pay \$50 for website hosting. Every 5 years, we renew the Domain name ([www.andreaskillian.com](http://www.andreaskillian.com)) for \$41.27. We budget \$60 annually.
2. Newsletter: The expense for each newsletter is, on average \$567. We budget \$1,200 annually for supplies, printing and mailing.
3. The Annual "Reunion" Meeting: The average expense is \$500:
  - Meals: \$0. If we use a restaurant, each attendee pays separately. If we use a caterer, each attendee either pays at the door or pre-registers for the meal, depending on the caterer's preference.
  - Guest Speakers: \$50-75 per speaker, \$200 budgeted annually.
  - Facility expense: \$100 for church fellowship hall rental/cleanup. Sometimes we may secure the facility for 2 years in advance.
  - Handouts expense: \$100 budgeted annually. Most handouts are donated items from local businesses or brochures from historical sites.

- Equipment expense (for presentations): \$0. If not part of facility rental, we borrow any needed equipment.
- Marketing expense: \$100 budgeted annually for any printing or signage.

Total Current Annual Expenses: \$1760.

Current Annual Activity Income: We request donations at our Annual "Reunion" Meeting and through our Newsletters and have historically met our budgeted goals. There are no plans to change our current method of fundraising.

Please note that one-time projects, such as book publications, will be budgeted and financed individually. For example, in our last book publication, we obtained donation commitments to cover the cost of the publication of 250 books prior to incurring the expense. Once the book was published, the donations were made to pay the publication expense. Proceeds from any future distributions of the book goes into the general fund.

Future Annual Activities:

The Association plans to conduct a fund drive in 2010 to meet a Treasury balance goal of \$8000. After meeting the annual expenses relating to the Website, Newsletter, and Annual "Reunion" Meeting, contingent upon Board approval, we will implement the following annual activities, not in any particular order:

- *Scholarship Program:* We plan start with 1-2 scholarships in the amounts of \$500-1000, annually, contingent on Board approval.
- *Cemetery Maintenance:* We plan to start with a budget of \$500 for tombstone repair or replacement of historical markers. We estimate the expense of repair for a historical marker to be approximately \$50-\$100. We estimate the replacement of a historical marker to be approximately \$250-300.
- *DNA Research:* We plan to start with a budget of \$500 to subsidize or pay for DNA kits for individuals: a) whose DNA markers could be of historical and educational importance to the Killian DNA Research Project and b) who are willing to participate in the project and c) who may need financial assistance in the purchase of the DNA kit.

In successive years, financial goals will be set and approved by the Board and future annual activity budgets will be modified as necessary. For one-time projects, financial goals will be set and approved by the Board and project budgets will be established as necessary.

Enclosed you will find a copy of our Book to assist you. After your review, please return the book to me.

Thank you for your consideration in this matter. Please do not hesitate to contact me should you have any questions or comments.

Sincerely,



Sandra Phillips, Treasurer

ANDREAS KILLIAN DESCENDANTS HISTORICAL ASSOCIATION

16310 Barcica Lane

Cornelius, NC 28031

Enclosures

/SJP

# **Descendants of Andreas Killian Descendants Historical Association**

## **DRAFT SAMPLE**

### **SCHOLARSHIP APPLICATION**

#### **Instructions**

---

1. Please print or type all information.
2. If any requested information is not applicable, please indicate in the appropriate spaces.
3. "Applicant" refers to the student applying for the scholarship.

#### **Attachments**

---

1. Current ACT or SAT scores (high school applicants only).
2. Current high school or college transcripts.
3. Current letters of recommendation (2) from teachers or educators familiar with the applicant's scholastic achievement and character.
4. Current letter of recommendation from an individual in the community who can provide information regarding the applicant's character, achievements in civic and potential in leadership and civic affairs.
5. Hand-written or typed essay on the topic "I Can Make a Difference."
6. List of community and/or extra-curricular activities.

*NOTE: Any omission of the above six attachments will automatically disqualify the applicant.*

#### **Certification**

---

The applicant, by signing, certifies that the information in this application is true and correct.

The applicant understands the application and attachments will be reviewed by the Scholarship Selection Committee and that any misstatement or omission will result in the revocation of consideration or award.

The applicant understands all information will be reviewed only by the Scholarship Selection Committee and only the award winners will be announced.

Each applicant will receive a letter of response, confirming their participation.

#### **Dates To Remember**

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- June - Completed applications and all attachments must be **postmarked no later than June 15** and mailed (not faxed) to the president of the Andreas Killian Descendants Historical Association (see bottom of application section for address).
- July - The Scholarship Selection Committee determines the finalists. These finalists may be contacted by a member of the Scholarship Selection Committee for a brief telephone interview.
- July - The winners are selected and notified.
- September - The winners are announced at the Annual Association Business Meeting. The winners need not be present (but recommended) at the meeting and understand their names will be announced to the attendees.

# Descendants of Andreas Killian Descendants Historical Association

## Draft Sample

### Scholarship Application

#### Applicant Information

---

Name \_\_\_\_\_

Address (Home) \_\_\_\_\_

Phone (Home) \_\_\_\_\_ Date of Birth \_\_\_\_\_

I am applying for the following award:  Vocational/Technical       College

#### Secondary School Information

---

School Name \_\_\_\_\_

Address \_\_\_\_\_

Principal \_\_\_\_\_ Phone \_\_\_\_\_

Graduation Date \_\_\_\_\_ ACT/SAT Scores \_\_\_\_\_

#### College/Vocational/Technical School Information

---

Institution Name \_\_\_\_\_

Address \_\_\_\_\_

Expected Date of Enrollment \_\_\_\_\_

#### Parent/Guardian Information

---

Name \_\_\_\_\_

Address \_\_\_\_\_

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent/Guardian Signature \_\_\_\_\_ Date \_\_\_\_\_

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Return completed form and all attachments to:

Sandra Phillips, Treasurer

Andreas Killian Descendants Historical Association

16310 Barcica Lane

Cornelius, NC 28031

e-mail: [sandyjp@bellsouth.net](mailto:sandyjp@bellsouth.net)

Submitted by: SJP  
Sandra Phillips, Treasurer

12/1/09  
 Date

**Part IX Financial Data**

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

**A. Statement of Revenues and Expenses**

Type of revenue or expense	Current tax year		3 prior tax years or 2 succeeding tax years		(e) Provide Total for (a) through (d)
	(a) From 2007 To 2008	(b) From 2008 To 2009	(c) From 2009 To 2010	(d) From 2010 To 2011	
<b>Revenues</b>					
1 Gifts, grants, and contributions received (do not include unusual grants)	1,884.42	4,558.67	7,036.64	3,500.00	16,979.73
2 Membership fees received	0	0	0	0	0
3 Gross investment income	0	0	0	0	0
4 Net unrelated business income	0	0	0	0	0
5 Taxes levied for your benefit	0	0	0	0	0
6 Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)	0	0	0	0	0
7 Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)	0	0	0	0	0
8 Total of lines 1 through 7	1,884.42	4,558.67	7,036.64	3,500.00	16,979.73
9 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)	0	0	0	0	0
10 Total of lines 8 and 9	1,884.42	4,558.67	7,036.64	3,500.00	16,979.73
11 Net gain or loss on sale of capital assets (attach schedule and see instructions)	0	0	0	0	0
12 Unusual grants	0	0	0	0	0
13 Total Revenue Add lines 10 through 12	1,884.42	4,558.67	7,036.64	3,500.00	16,979.73
<b>Expenses</b>					
14 Fundraising expenses	0	0	0	0	
15 Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)	0	0	0	1,300.00	
16 Disbursements to or for the benefit of members (attach an itemized list)	0	0	0	0	
17 Compensation of officers, directors, and trustees	0	0	0	0	
18 Other salaries and wages	0	0	0	0	
19 Interest expense	0	0	0	0	
20 Occupancy (rent, utilities, etc.)	0	0	0	0	
21 Depreciation and depletion	0	0	0	0	
22 Professional fees	0	0	0	0	
23 Any expense not otherwise classified, such as program services (attach itemized list)	1,626.47	1,600.78	4,831.07	1,850.00	
24 Total Expenses Add lines 14 through 23	1,626.47	1,600.78	4,831.07	3,150.00	

**Andreas Killian Descendants Historical Association**  
**EIN: 80-0427367**  
**Treasurer's Report**  
**Fiscal Year 2008-2009**

Balance a/o September 12, 2008 \$ 388.67

Receipts

Donations:

From Annual Reunion Meeting, Sept. 2008	\$ 1,158.00
By Mail	\$ 3,012.00

**TOTAL RECEIPTS** \$4,558.67

Disbursements

Postage and Copy expenses related to February 2009 Newsletter	\$ 589.45
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T Shirts (246 qty ave. cost \$3.85)	\$ 884.33
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Postage and Printing expenses for marketing the Annual Reunion Meeting, Sept. 2008	\$ 77.00
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Website Maintenance	<u>\$ 50.00</u>
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**TOTAL DISBURSEMENTS** \$1,600.78

Balance a/o August 31, 2009 \$ 2,957.89

Andreas Killian Descendants Historical Association

EIN: 80-0427367

Treasurer's Report

PROJECTED Fiscal Year 2009-2010

Balance a/o August 31, 2009

\$ 2,957.89

Receipts

Donations	\$3,236.64
Donations specific to Book Publication	3,000.00
Projected additional Donations	<u>800.00 (est.)</u>

**TOTAL RECEIPTS**

\$7,036.64 (est.)

Disbursements

*Website:*

Website Maintenance	(50.00)	
		\$ (50.00)

*Newsletter:*

Postage and Copy expenses related to August 2009 Newsletter	(545.97)	
Postage and Copy expenses related to February 2010 Newsletter	<u>(600.00) (est.)</u>	
		(1,145.97) (est.)

*Annual "Reunion" Meeting (Sept. 2009):*

Church Donation for Use of Fellowship Hall	(200.00)	
Postage and Copy expenses for marketing	(100.00)	
Monument Wreath	(37.45)	
Cemetery Flower Memorials	(64.32)	
T Shirts (Children T Shirts)	<u>(164.00)</u>	
		(565.77)

*Book Publication:*

	<u>(3,069.33)</u>	
		<u>(3,069.33)</u>

**TOTAL DISBURSEMENTS**

(4,831.07) (est.)

Projected Balance a/o August 31, 2010

\$5,163.46 (est.)



Andreas Killian Descendants Historical Association

EIN: 80-0427367

Treasurer's Report

PROJECTED Fiscal Year 2010-2011

Projected Balance a/o August 31, 2010

\$ 5,163.46

Receipts

Donations \$3,500.00

**TOTAL RECEIPTS**

\$3,500

Disbursements

*Website:*

Website Maintenance (50.00)

\$ (50.00)

*Newsletter:*

Postage and Copy expenses related to  
August 2009 Newsletter (600.00)

Postage and Copy expenses related to  
February 2010 Newsletter (600.00)

(1,200.00)

*Annual "Reunion" Meeting (Sept. 2010):*

Church Donation for Use of Fellowship Hall (100.00)

Postage and Copy expenses for marketing (100.00)

Cemetery Flower Memorials (60.00)

Guest Lecturers (200.00)

Handouts (100.00)

Misc. expense (40.00)

(600.00)

1 *Scholarship* (500.00)

Historical Cemetery Repair/ Replace (500.00)

DNA Research (300.00)

(1,300.00)

**TOTAL DISBURSEMENTS**

(3,150.00)

Projected Balance a/o August 31, 2011

\$5,513.46