

CITY OF STERLING
CHARITABLE ORGANIZATIONS EXEMPTION APPLICATION

11. Give the following information about the organization's governing body:

a. Names, addresses, and titles of officers, directors, trustees, etc. b. Annual compensation

c. Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials, if yes, name and explain?

12. Does the organization control or is it controlled by any other organization, if yes, explain?

13. Does or will the organization directly or indirectly engage in any of the following transactions with any political organization or other exempt organization: (a) grants; (b) purchases or sales of assets; (c) rental of facilities or equipment; (d) loans or loan guarantees; (e) reimbursement arrangements; (f) performance of services, membership, or fundraising solicitations; or (g) sharing of facilities, equipment, mailing lists or other assets, or paid employees? If yes, explain fully and identify the other organizations involved.

14. Is the organization financially accountable to any other organization? If yes, explain and identify the other organization. Include details concerning accountability.

15. What assets does the organization have that are used in the performance of its exempt function?

16. Will the organization be the beneficiary of tax-exempt bond financing within the next 2 years? _____

17. Will any of the organization's facilities or operations be managed by another organization or individual under a contractual agreement? _____

18. Is the organization a party to a lease? If yes, attach a copy of the contract. _____

19. Is the organization a membership organization? If yes, complete the following: _____

a. Describe the organization's membership requirements and attach a schedule of membership fees and dues.

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- b. Describe the organization's present and proposed efforts to attract members and attach a copy of any descriptive literature or promotional material used for this purpose.

- c. What benefits do (or will) the members receive in exchange for their payment of dues?

20. If the organization provides benefits, services, or products, are the recipients required, or will they be required, to pay for them? If yes, explain how the charges are determined and attach a copy of the current fee schedule.

21. Does or will the organization limit its benefits, services, or products to specific individuals or classes of individuals? If yes, explain how the recipients or beneficiaries are or will be selected.

22. Does or will the organization attempt to influence legislation? If yes, explain. Give an estimate of the percentage of the organization's time and funds that it devotes or plans to devote to this activity.

23. Does or will the organization intervene in any way in political campaigns, including the publication or distribution of statements? If yes, explain fully.

24. Provide copies of the organization's sources of funds and its expenditures for the current year and for each of the 3 years immediately before it. If in existence less than 4 years, provide amounts for the years in existence. **If in existence less than 1 year, also provide proposed budgets for the 2 years following the current year.**

25. Provide the organization's assets and liabilities as of the end of the current year, or if not applying at the end of the year, the end of the prior month. Provide date of schedule. _____

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INSTRUCTIONS

Line 1. Full name of organization. Enter the organization's name exactly as it appears in its creating document including amendments. Show the other name in parentheses, if the organization will be operating under another name.

Line 2. Address of organization. Enter Sterling location and mailing address in parentheses, if the organization uses a different mailing address.

Line 3. Type of organization. Enter the type of organization and attach a copy of the organizing document. The organizing document must indicate how the organization was formed and a dissolution clause. What will happen to the assets of the organization upon dissolution of the organization?

Line 4. Organizational purposes. Specify the organizational purposes of the organization. List all the purposes of the organization.

Line 5. Employer identification number. Enter the nine-digit EIN the IRS assigned to the organization.

Line 6. Person to contact. Enter the name and telephone number of the person to contact during business hours if more information is needed. The contact person should be an officer, director, or a person who is familiar with the organization's activities and is authorized to act on its behalf.

Line 7. Fiscal year end and date formed. Enter the month the organization's annual accounting period ends. Enter the date the organization started.

Line 8. It is important that you report all activities carried on by the organization to enable the City to make a proper determination of the organization's exempt status. Attach additional pages if necessary.

Line 9. If it is anticipated that the organization's principal sources of support will increase or decrease substantially in relation to the organization's total support, attach a statement describing anticipated changes and explaining the basis for the expectation.

Line 10. "Fundraising activity" includes the solicitation of contributions and both functionally related activities and unrelated activities. Include a description of the nature and magnitude of the activities.

Line 11a. Furnish the mailing addresses of the organization's principal officers, directors, or trustees. Do not give the address of the organization.

Line 11b. The annual compensation includes salary, bonus, and any other form of payment to the individual for services while employed by the organization.

Line 11c. Public officials include anyone holding an elected position or anyone appointed to a position by an elected official.

Line 12. If your organization controls or is controlled by another exempt organization or a taxable organization, answer "Yes".

Line 13. If the organization conducts any financial transactions or nonfinancial activities with an exempt organization or with a political organization, answer "Yes," and explain.

Line 14. If the organization must report its income and expense activity to any other organization answer "Yes".

Line 15. Examples of assets used to perform an exempt function are: land, building, equipment, and publications. Do not include cash or property producing investment income. If you have no assets used in performing the organization's exempt function, answer "N/A".

Line 17. If another exempt organization, a taxable organization, or an individual manages the organization, answer "Yes".

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Line 18. If the organization leases property from anyone or leases any of its property to anyone, answer "Yes".

Line 19. A membership organization for purposes of this question is an organization that is composed of individuals or organizations who:

1. Share in the common goal for which the organization was created;
2. Actively participate in achieving the organization's purposes;
3. Pay dues.

Line 20. Examples of benefits, services, and products are: meals to homeless people, home for the aged, a museum open to the public, and a symphony orchestra giving public performances.

Line 22. An organization is attempting to influence legislation if it contacts or urges the public to contact members of a legislative body, for the purpose of proposing, supporting, or opposing legislation, or if it advocates the adoption or rejection of legislation.

Line 23. An organization is intervening in a political campaign if it promotes or opposes the candidacy or prospective candidacy of an individual for public office.

Line 24. Prepare the statements using the method of accounting and the accounting period the organization uses in keeping its books and records. If the organization uses a method other than the cash receipts and disbursements method, attach a statement explaining the method used.