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## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

2008

Department of the Treasury  
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements

Open to Public Inspection

For the 2008 calendar year, or tax year beginning , 2008, and ending

|                                                                                                                                                                                                                                                                                                |  |                                                                                                                                                                                                                                                                          |  |                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------------------|
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Termination<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending |  | Please use IRS label or print or type See specific instructions<br><b>NORTH AMERICAN BLUEBIRD SOCIETY, INC.</b><br><b>PO BOX 43</b><br><b>MIAMIVILLE, OH 45147</b>                                                                                                       |  | <b>D</b> Employer Identification Number<br><b>52-1118450</b> |
|                                                                                                                                                                                                                                                                                                |  |                                                                                                                                                                                                                                                                          |  | <b>E</b> Telephone number                                    |
|                                                                                                                                                                                                                                                                                                |  | <b>F</b> Name and address of principal officer<br><b>Same As C Above</b>                                                                                                                                                                                                 |  | <b>G</b> Gross receipts \$ <b>72,931.</b>                    |
|                                                                                                                                                                                                                                                                                                |  | <b>H(a)</b> Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br><b>H(b)</b> Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If 'No,' attach a list (see instructions) |  |                                                              |
| <b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c) ( <b>3</b> ) (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527                                                                                                                             |  |                                                                                                                                                                                                                                                                          |  |                                                              |
| <b>J</b> Website: <b>www.nabluebirdsociety.org</b>                                                                                                                                                                                                                                             |  | <b>H(c)</b> Group exemption number                                                                                                                                                                                                                                       |  |                                                              |
| <b>K</b> Type of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other                                                                                                              |  | <b>L</b> Year of Formation                                                                                                                                                                                                                                               |  | <b>M</b> State of legal domicile                             |

|                                                                                                                            |                                                                                                                                                                                                                                                                    |                                                                                                         |
|----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Part I Summary</b>                                                                                                      |                                                                                                                                                                                                                                                                    |                                                                                                         |
| Activities & Governance                                                                                                    | <b>1</b> Briefly describe the organization's mission or most significant activities. <u>EDUCATIONAL, SCIENTIFIC AND CHARITABLE PURSUITS THAT PROMOTE THE PROSPERITY AND WELL BEING OF BLUEBIRDS AND OTHER NATIVE CAVITY-NESTING BIRD SPECIES OF NORTH AMERICA.</u> |                                                                                                         |
|                                                                                                                            | <b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets                                                                                                                        |                                                                                                         |
|                                                                                                                            | <b>3</b> Number of voting members of the governing body (Part VI, line 1a) <b>3</b> <b>2,200</b>                                                                                                                                                                   |                                                                                                         |
|                                                                                                                            | <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) <b>4</b> <b>0</b>                                                                                                                                                           |                                                                                                         |
|                                                                                                                            | <b>5</b> Total number of employees (Part V, line 2a) <b>5</b> <b>0</b>                                                                                                                                                                                             |                                                                                                         |
|                                                                                                                            | <b>6</b> Total number of volunteers (estimate if necessary) <b>6</b> <b>28</b>                                                                                                                                                                                     |                                                                                                         |
|                                                                                                                            | <b>7a</b> Total gross unrelated business revenue from Part VIII, line 12, column (C) <b>7a</b> <b>948.</b>                                                                                                                                                         |                                                                                                         |
|                                                                                                                            | <b>b</b> Net unrelated business taxable income from Form 990-T, line 34 <b>7b</b> <b>0.</b>                                                                                                                                                                        |                                                                                                         |
|                                                                                                                            | Revenue                                                                                                                                                                                                                                                            | <b>8</b> Contributions and grants (Part VIII, line 1h) <b>26,405.</b> <b>58,024.</b>                    |
|                                                                                                                            |                                                                                                                                                                                                                                                                    | <b>9</b> Program service revenue (Part VIII, line 2g)                                                   |
| <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) <b>4,479.</b> <b>4,000.</b>                        |                                                                                                                                                                                                                                                                    |                                                                                                         |
| <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) <b>3,297.</b> <b>2,205.</b>             |                                                                                                                                                                                                                                                                    |                                                                                                         |
| <b>12</b> Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12) <b>90,446.</b> <b>64,229.</b> |                                                                                                                                                                                                                                                                    |                                                                                                         |
| Expenses                                                                                                                   |                                                                                                                                                                                                                                                                    | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)                              |
|                                                                                                                            |                                                                                                                                                                                                                                                                    | <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)                                 |
|                                                                                                                            |                                                                                                                                                                                                                                                                    | <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) <b>224.</b> |
|                                                                                                                            |                                                                                                                                                                                                                                                                    | <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)                                |
|                                                                                                                            |                                                                                                                                                                                                                                                                    | <b>b</b> Total fundraising expenses (Part IX, column (D), line 25)                                      |
| Net Assets or Fund Balances                                                                                                | <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) <b>35,619.</b> <b>37,545.</b>                                                                                                                                                               |                                                                                                         |
|                                                                                                                            | <b>18</b> Total expenses (Add lines 13-17 (must equal Part IX, column (A), line 25)) <b>35,843.</b> <b>37,545.</b>                                                                                                                                                 |                                                                                                         |
|                                                                                                                            | <b>19</b> Revenue less expenses Subtract line 18 from line 12 <b>54,603.</b> <b>26,684.</b>                                                                                                                                                                        |                                                                                                         |
|                                                                                                                            | <b>20</b> Total assets (Part X, line 16) <b>148,564.</b> <b>175,248.</b>                                                                                                                                                                                           |                                                                                                         |
|                                                                                                                            | <b>21</b> Total liabilities (Part X, line 26) <b>0.</b> <b>0.</b>                                                                                                                                                                                                  |                                                                                                         |
| <b>22</b> Net assets or fund balances Subtract line 21 from line 20 <b>148,564.</b> <b>175,248.</b>                        |                                                                                                                                                                                                                                                                    |                                                                                                         |

|                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Part II Signature Block</b>                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                        |
| Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge. |                                                                                                                                                                                                                                        |
| <b>Sign Here</b>                                                                                                                                                                                                                                                                                                      | <b>Signature of officer</b> _____ <b>Date</b> _____                                                                                                                                                                                    |
| <b>Type or print name and title</b> _____                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                        |
| <b>Paid Preparer's Use Only</b>                                                                                                                                                                                                                                                                                       | <b>Preparer's signature</b> <b>SHIRLEY WATKINS</b> <b>Date</b> _____<br><b>Firm's name (or yours if self-employed), address, and ZIP + 4</b> <b>WATKINS ACCOUNTING TAX SVC</b><br><b>113 E 19TH ST</b><br><b>BLOOMINGTON, IN 47408</b> |
| <b>Check if self-employed</b> <input type="checkbox"/> <b>Preparer's identifying number (see instructions)</b> <b>N/A</b><br><b>EIN</b> <b>N/A</b><br><b>Phone no</b> <b>(812) 339-0016</b>                                                                                                                           |                                                                                                                                                                                                                                        |

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

BAA For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

TEEA0112L 12/22/08 Form 990 (2008)

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**Part III** Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission.

EDUCATIONAL, SCIENTIFIC AND CHARITABLE PURSUITS THAT PROMOTE THE PROSPERITY AND WELL  
BEING OF BLUEBIRDS AND OTHER NATIVE CAVITY-NESTING BIRD SPECIES OF NORTH AMERICA.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

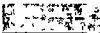
☐ Yes ☒ No

If 'Yes,' describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code ) (Expenses \$ 15,878. including grants of \$ ) (Revenue \$ )

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4b (Code ) (Expenses \$ 1,800. including grants of \$ ) (Revenue \$ )

DIRECTED ANNUAL CONFERENCE AT KEARNEY, NB

4c (Code ) (Expenses \$ 19,867. including grants of \$ ) (Revenue \$ )

MISCELLANEOUS OFFICE EXPENSES

4d Other program services (Describe in Schedule O )

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses ▶ \$ 37,545. (Must equal Part IX, Line 25, column (B) )

**Part IV Checklist of Required Schedules**

|                                                                                                                                                                                                                                                                                       | Yes | No |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A                                                                                                                                                   | X   |    |
| 2 Is the organization required to complete Schedule B, Schedule of Contributors?                                                                                                                                                                                                      |     | X  |
| 3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I                                                                                                |     | X  |
| 4 Section 501(c)(3) organizations Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II                                                                                                                                                          |     | X  |
| 5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If 'Yes,' complete Schedule C, Part III                                                                               |     |    |
| 6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I                                                   |     | X  |
| 7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II                                                                       |     | X  |
| 8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III                                                                                                                                   |     | X  |
| 9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV                                 |     | X  |
| 10 Did the organization hold assets in term, permanent, or quasi-endowments? If 'Yes,' complete Schedule D, Part V                                                                                                                                                                    |     | X  |
| 11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? If 'Yes,' complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable                                                                                                                           |     | X  |
| 12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII                                                                  |     | X  |
| 13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E                                                                                                                                                                                  |     | X  |
| 14a Did the organization maintain an office, employees, or agents outside of the U.S.?                                                                                                                                                                                                |     | X  |
| b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? If 'Yes,' complete Schedule F, Part I                                                                      |     | X  |
| 15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Part II                                                                      |     | X  |
| 16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Part III                                                                          |     | X  |
| 17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? If 'Yes,' complete Schedule G, Part I                                                                                                                                                             |     | X  |
| 18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II                                                                                                                                                         |     | X  |
| 19 Did the organization report more than \$15,000 on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III                                                                                                                                                                      |     | X  |
| 20 Did the organization operate one or more hospitals? If 'Yes,' complete Schedule H                                                                                                                                                                                                  |     | X  |
| 21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? If 'Yes,' complete Schedule I, Parts I and II.                                                                                                                                                       |     | X  |
| 22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? If 'Yes,' complete Schedule I, Parts I and III                                                                                                                                                       |     | X  |
| 23 Did the organization answer 'Yes' to Part VII, Section A, questions 3, 4, or 5? If 'Yes,' complete Schedule J                                                                                                                                                                      |     | X  |
| 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? If 'Yes,' answer questions 24b-24d and complete Schedule K. If 'No,' go to question 25 |     | X  |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?                                                                                                                                                                                   |     |    |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?                                                                                                                                          |     |    |
| d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?                                                                                                                                                                             |     |    |
| 25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If 'Yes,' complete Schedule L, Part I                                                                                     |     | X  |
| b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? If 'Yes,' complete Schedule L, Part I                                                                                                          |     | X  |
| 26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If 'Yes,' complete Schedule L, Part II                                             |     | X  |
| 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? If 'Yes,' complete Schedule L, Part III                                                         |     | X  |

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Form 990 (2008)

**Part IV Checklist of Required Schedules (continued)**

|                                                                                                                                                                                                                                                                                                                                             | Yes | No |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 28 During the tax year, did any person who is a current or former officer, director, trustee, or key employee:                                                                                                                                                                                                                              |     |    |
| a 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 entity (individually or collectively with other person(s) listed in Part VII, Section A)? If 'Yes,' complete Schedule L, Part IV | 28a | X  |
| b Have a family member who had a direct or indirect business relationship with the organization? If 'Yes,' complete Schedule L, Part IV                                                                                                                                                                                                     | 28b | X  |
| c Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? If 'Yes,' complete Schedule L, Part IV                                                                                                                       | 28c | X  |
| 29 Did the organization receive more than \$25,000 in non-cash contributions? If 'Yes,' complete Schedule M                                                                                                                                                                                                                                 | 29  | X  |
| 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If 'Yes,' complete Schedule M                                                                                                                                                                 | 30  | X  |
| 31 Did the organization liquidate, terminate, or dissolve and cease operations? If 'Yes,' complete Schedule N, Part I                                                                                                                                                                                                                       | 31  | X  |
| 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If 'Yes,' complete Schedule N, Part II                                                                                                                                                                                                     | 32  | X  |
| 33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If 'Yes,' complete Schedule R, Part I                                                                                                                                                     | 33  | X  |
| 34 Was the organization related to any tax-exempt or taxable entity? If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1                                                                                                                                                                                                        | 34  | X  |
| 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' complete Schedule R, Part V, line 2                                                                                                                                                                                                  | 35  | X  |
| 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If 'Yes,' complete Schedule R, Part V, line 2                                                                                                                                                                 | 36  | X  |
| 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If 'Yes,' complete Schedule R, Part VI                                                                                                            | 37  | X  |

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Form 990 (2008)

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

|                                                                                                                                                                                                                                                                                              | Yes  | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|----|
| <b>1 a</b> Enter the number reported in Box 3 of form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable.                                                                                                                                         | 1 a  | 0  |
| <b>1 b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.                                                                                                                                                                                                  | 1 b  | 0  |
| <b>1 c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?                                                                                                                          | 1 c  |    |
| <b>2 a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.                                                                                                    | 2 a  | 0  |
| <b>2 b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?<br><b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions).                                   | 2 b  |    |
| <b>3 a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?                                                                                                                                                              | 3 a  | X  |
| <b>3 b</b> If 'Yes,' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.                                                                                                                                                                                 | 3 b  |    |
| <b>4 a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?                                        | 4 a  | X  |
| <b>4 b</b> If 'Yes,' enter the name of the foreign country. ▶<br>See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.</b>                                                                                    | 4 b  |    |
| <b>5 a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?...                                                                                                                                                                          | 5 a  | X  |
| <b>5 b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?                                                                                                                                                                  | 5 b  | X  |
| <b>5 c</b> If 'Yes,' to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?                                                                                                                              | 5 c  |    |
| <b>6 a</b> Did the organization solicit any contributions that were not tax deductible?                                                                                                                                                                                                      | 6 a  | X  |
| <b>6 b</b> If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not deductible?                                                                                                                                         | 6 b  |    |
| <b>7 Organizations that may receive deductible contributions under section 170(c).</b>                                                                                                                                                                                                       |      |    |
| <b>a</b> Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?                                                                                                                                                                     | 7 a  | X  |
| <b>b</b> If 'Yes,' did the organization notify the donor of the value of the goods or services provided?                                                                                                                                                                                     | 7 b  |    |
| <b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?                                                                                                                                                | 7 c  | X  |
| <b>d</b> If 'Yes,' indicate the number of Forms 8282 filed during the year.                                                                                                                                                                                                                  | 7 d  |    |
| <b>e</b> Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?                                                                                                                                                   | 7 e  | X  |
| <b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?                                                                                                                                                                        | 7 f  | X  |
| <b>g</b> For all contributions of qualified intellectual property, did the organization file Form 8899 as required?                                                                                                                                                                          | 7 g  | X  |
| <b>h</b> For all contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?                                                                                                                                                           | 7 h  | X  |
| <b>8 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | 8    |    |
| <b>9 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.</b>                                                                                                                                                                                               |      |    |
| <b>a</b> Did the organization make any taxable distributions under section 4966?                                                                                                                                                                                                             | 9 a  |    |
| <b>b</b> Did the organization make any distribution to a donor, donor advisor, or related person?                                                                                                                                                                                            | 9 b  |    |
| <b>10 Section 501(c)(7) organizations. Enter:</b>                                                                                                                                                                                                                                            |      |    |
| <b>a</b> Initiation fees and capital contributions included on Part VIII, line 12.                                                                                                                                                                                                           | 10 a |    |
| <b>b</b> Gross Receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.                                                                                                                                                                                        | 10 b |    |
| <b>11 Section 501(c)(12) organizations. Enter:</b>                                                                                                                                                                                                                                           |      |    |
| <b>a</b> Gross income from other members or shareholders.                                                                                                                                                                                                                                    | 11 a |    |
| <b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).                                                                                                                                                        | 11 b |    |
| <b>12 a Section 5047(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?                                                                                                                                                                       | 12 a |    |
| <b>b</b> If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.                                                                                                                                                                                              | 12 b |    |

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Form 990 (2008)

## Section A. Governing Body and Management

|  | Yes | No |
|--|-----|----|
|--|-----|----|

- ## Section B. Policies

|     |    |
|-----|----|
| Yes | No |
|-----|----|

- |   |   |   |
|---|---|---|
| 1 | 2 | 3 |
|---|---|---|

## Section C. Disclosures

- 17 List the states with which a copy of this Form 990 is required to be filed ▶ None
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.  
☐ Own website      ☐ Another's website      ☐ Upon request
- 19 Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization:  
▶ GREG BEAVERS 8365 S OLD ST RD 37 BLOOMINGTON IN 47403



Part VII. Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (cont.)

| (A)<br>Name and Title | (B)<br>Average<br>hours<br>per week | (C)<br>Position (check all that apply) |                       |         |              |                              |        | (D)<br>Reportable<br>compensation from<br>the organization<br>(W-2/1099-MISC) | (E)<br>Reportable<br>compensation from<br>related organizations<br>(W-2/1099-MISC) | (F)<br>Estimated<br>amount of other<br>compensation<br>from the<br>organization<br>and related<br>organizations |
|-----------------------|-------------------------------------|----------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
|                       |                                     | Individual trustee or director         | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| - - - - -             |                                     |                                        |                       |         |              |                              |        |                                                                               |                                                                                    |                                                                                                                 |
| 1 b Total             |                                     |                                        |                       |         |              |                              |        | 0.                                                                            | 0.                                                                                 | 0.                                                                                                              |

|           |    |    |    |
|-----------|----|----|----|
| 1 b Total | 0. | 0. | 0. |
|-----------|----|----|----|

2 Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization ▶ 0

3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If 'Yes,' complete Schedule J for such individual . . .

|   | Yes | No |
|---|-----|----|
| 3 |     | X  |
| 4 |     | X  |
| 5 |     | X  |

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If 'Yes' complete Schedule J for such individual

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If 'Yes,' complete Schedule J for such person

## Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

| (A)<br>Name and business address | (B)<br>Description of Services | (C)<br>Compensation |
|----------------------------------|--------------------------------|---------------------|
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |
|                                  |                                |                     |

2 Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization ▶ 0

**Part VIII Statement of Revenue**

|                                                                                      |                                                                                                                                     |                           | (A)<br>Total revenue | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from tax<br>under sections<br>512, 513, or 514 |
|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|---------------------------|----------------------|----------------------------------------------------|-----------------------------------------|---------------------------------------------------------------------------|
| <b>CONTRIBUTIONS, GIFTS, GRANTS<br/>AND OTHER SIMILAR AMOUNTS</b>                    | <b>1 a</b> Federated campaigns                                                                                                      | <b>1 a</b>                |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b> Membership dues                                                                                                            | <b>1 b</b> 51,359.        |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b> Fundraising events                                                                                                         | <b>1 c</b>                |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>d</b> Related organizations                                                                                                      | <b>1 d</b>                |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>e</b> Government grants (contributions)                                                                                          | <b>1 e</b>                |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>f</b> All other contributions, gifts, grants, and<br>similar amounts not included above                                          | <b>1 f</b> 6,665.         |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>g</b> Noncash contribns included in lns 1a-1f                                                                                    | \$                        |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>h</b> Total. Add lines 1a-1f                                                                                                     |                           | 58,024.              |                                                    |                                         |                                                                           |
| <b>PROGRAM SERVICE REVENUE</b>                                                       | <b>2 a</b>                                                                                                                          | Business Code             |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b>                                                                                                                            |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b>                                                                                                                            |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>d</b>                                                                                                                            |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>e</b>                                                                                                                            |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>f</b> All other program service revenue                                                                                          |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>g</b> Total. Add lines 2a-2f                                                                                                     |                           |                      |                                                    |                                         |                                                                           |
| <b>OTHER REVENUE</b>                                                                 | <b>3</b> Investment income (including dividends, interest and<br>other similar amounts)                                             |                           | 4,000.               | 4,000.                                             |                                         |                                                                           |
|                                                                                      | <b>4</b> Income from investment of tax-exempt bond proceeds                                                                         |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>5</b> Royalties                                                                                                                  |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>6 a</b> Gross Rents                                                                                                              | (i) Real (ii) Personal    |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b> Less rental expenses                                                                                                       |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b> Rental income or (loss)                                                                                                    |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>d</b> Net rental income or (loss)                                                                                                |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>7 a</b> Gross amount from sales of<br>assets other than inventory                                                                | (i) Securities (ii) Other |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b> Less cost or other basis<br>and sales expenses                                                                             |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b> Gain or (loss)                                                                                                             |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>d</b> Net gain or (loss)                                                                                                         |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>8 a</b> Gross income from fundraising events<br>(not including \$ of contributions reported on line 1c).<br>See Part IV, line 18 | <b>a</b>                  |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b> Less direct expenses                                                                                                       | <b>b</b>                  |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b> Net income or (loss) from fundraising events                                                                               |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>9 a</b> Gross income from gaming activities<br>See Part IV, line 19                                                              | <b>a</b>                  |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b> Less direct expenses                                                                                                       | <b>b</b>                  |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b> Net income or (loss) from gaming activities                                                                                |                           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>10 a</b> Gross sales of inventory, less returns<br>and allowances                                                                | <b>a</b> 9,650.           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>b</b> Less cost of goods sold                                                                                                    | <b>b</b> 8,702.           |                      |                                                    |                                         |                                                                           |
|                                                                                      | <b>c</b> Net income or (loss) from sales of inventory                                                                               |                           | 948.                 |                                                    | 948.                                    |                                                                           |
| Miscellaneous Revenue                                                                |                                                                                                                                     | Business Code             |                      |                                                    |                                         |                                                                           |
| <b>11 a</b> ADVERTISING                                                              | 519100                                                                                                                              |                           | 1,257.               |                                                    | 1,257.                                  |                                                                           |
| <b>b</b>                                                                             |                                                                                                                                     |                           |                      |                                                    |                                         |                                                                           |
| <b>c</b>                                                                             |                                                                                                                                     |                           |                      |                                                    |                                         |                                                                           |
| <b>d</b> All other revenue                                                           |                                                                                                                                     |                           |                      |                                                    |                                         |                                                                           |
| <b>e</b> Total. Add lines 11a-11d                                                    |                                                                                                                                     |                           | 1,257.               |                                                    |                                         |                                                                           |
| <b>12</b> Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c,<br>10c, and 11e. |                                                                                                                                     |                           | 64,229.              | 4,000.                                             | 948.                                    | 1,257.                                                                    |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

| <i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>                                                                                                                                      | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| 1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21                                                                                                                            |                       |                                 |                                        |                             |
| 2 Grants and other assistance to individuals in the U.S. See Part IV, line 22                                                                                                                                              |                       |                                 |                                        |                             |
| 3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16.                                                                                                |                       |                                 |                                        |                             |
| 4 Benefits paid to or for members                                                                                                                                                                                          |                       |                                 |                                        |                             |
| 5 Compensation of current officers, directors, trustees, and key employees                                                                                                                                                 | 0.                    | 0.                              | 0.                                     | 0.                          |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1) and persons described in section 4958(c)(3)(B)                                                                             | 0.                    | 0.                              | 0.                                     | 0.                          |
| 7 Other salaries and wages                                                                                                                                                                                                 |                       |                                 |                                        |                             |
| 8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)                                                                                                                            |                       |                                 |                                        |                             |
| 9 Other employee benefits                                                                                                                                                                                                  |                       |                                 |                                        |                             |
| 10 Payroll taxes                                                                                                                                                                                                           |                       |                                 |                                        |                             |
| 11 Fees for services (non-employees)                                                                                                                                                                                       |                       |                                 |                                        |                             |
| a Management                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| b Legal                                                                                                                                                                                                                    |                       |                                 |                                        |                             |
| c Accounting                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| d Lobbying                                                                                                                                                                                                                 |                       |                                 |                                        |                             |
| e Prof fundraising svcs See Part IV, ln 17                                                                                                                                                                                 |                       |                                 |                                        |                             |
| f Investment management fees                                                                                                                                                                                               |                       |                                 |                                        |                             |
| g Other                                                                                                                                                                                                                    |                       |                                 |                                        |                             |
| 12 Advertising and promotion                                                                                                                                                                                               |                       |                                 |                                        |                             |
| 13 Office expenses                                                                                                                                                                                                         |                       |                                 |                                        |                             |
| 14 Information technology                                                                                                                                                                                                  |                       |                                 |                                        |                             |
| 15 Royalties                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| 16 Occupancy                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| 17 Travel                                                                                                                                                                                                                  | 1,800.                |                                 | 1,800.                                 |                             |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials                                                                                                                          |                       |                                 |                                        |                             |
| 19 Conferences, conventions, and meetings                                                                                                                                                                                  |                       |                                 |                                        |                             |
| 20 Interest                                                                                                                                                                                                                |                       |                                 |                                        |                             |
| 21 Payments to affiliates                                                                                                                                                                                                  |                       |                                 |                                        |                             |
| 22 Depreciation, depletion, and amortization                                                                                                                                                                               |                       |                                 |                                        |                             |
| 23 Insurance                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| 24 Other expenses Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)                                                      |                       |                                 |                                        |                             |
| a <u>Printing and Publications</u>                                                                                                                                                                                         | 15,878.               | 15,878.                         |                                        |                             |
| b <u>MISCELLANEOUS</u>                                                                                                                                                                                                     | 11,733.               | 11,733.                         |                                        |                             |
| c <u>Postage and Shipping</u>                                                                                                                                                                                              | 5,159.                | 5,159.                          |                                        |                             |
| d <u>MERCHANT &amp; PAYPAL FEES</u>                                                                                                                                                                                        | 1,285.                | 1,285.                          |                                        |                             |
| e <u>MEMBERSHIP DUES</u>                                                                                                                                                                                                   | 657.                  | 657.                            |                                        |                             |
| f All other expenses                                                                                                                                                                                                       | 1,033.                | 1,033.                          |                                        |                             |
| 25 Total functional expenses. Add lines 1 through 24f                                                                                                                                                                      | 37,545.               | 35,745.                         | 1,800.                                 | 0.                          |
| 26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation |                       |                                 |                                        |                             |

BAA

Form 990 (2008)

**Part X Balance Sheet**

|                                                                      |                                                                                                                                                                         | (A)<br>Beginning of year |          | (B)<br>End of year |
|----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|----------|--------------------|
| <b>ASSETS</b>                                                        | 1 Cash — non-interest-bearing                                                                                                                                           | 147,460.                 | 1        | 173,676.           |
|                                                                      | 2 Savings and temporary cash investments                                                                                                                                |                          | 2        |                    |
|                                                                      | 3 Pledges and grants receivable, net                                                                                                                                    |                          | 3        |                    |
|                                                                      | 4 Accounts receivable, net                                                                                                                                              |                          | 4        |                    |
|                                                                      | 5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L                            |                          | 5        |                    |
|                                                                      | 6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L      |                          | 6        |                    |
|                                                                      | 7 Notes and loans receivable, net                                                                                                                                       |                          | 7        |                    |
|                                                                      | 8 Inventories for sale or use                                                                                                                                           | 1,104.                   | 8        | 1,572.             |
|                                                                      | 9 Prepaid expenses and deferred charges                                                                                                                                 |                          | 9        |                    |
|                                                                      | 10a Land, buildings, and equipment, cost basis                                                                                                                          | 10a                      |          |                    |
|                                                                      | b Less, accumulated depreciation. Complete Part VI of Schedule D                                                                                                        | 10b                      | 10c      |                    |
|                                                                      | 11 Investments — publicly-traded securities                                                                                                                             |                          | 11       |                    |
|                                                                      | 12 Investments — other securities. See Part IV, line 11                                                                                                                 |                          | 12       |                    |
|                                                                      | 13 Investments — program-related. See Part IV, line 11                                                                                                                  |                          | 13       |                    |
|                                                                      | 14 Intangible assets                                                                                                                                                    |                          | 14       |                    |
|                                                                      | 15 Other assets. See Part IV, line 11                                                                                                                                   |                          | 15       |                    |
| 16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34). | 148,564.                                                                                                                                                                | 16                       | 175,248. |                    |
| <b>LIABILITIES</b>                                                   | 17 Accounts payable and accrued expenses                                                                                                                                |                          | 17       |                    |
|                                                                      | 18 Grants payable                                                                                                                                                       |                          | 18       |                    |
|                                                                      | 19 Deferred revenue                                                                                                                                                     |                          | 19       |                    |
|                                                                      | 20 Tax-exempt bond liabilities                                                                                                                                          |                          | 20       |                    |
|                                                                      | 21 Escrow account liability. Complete Part IV of Schedule D                                                                                                             |                          | 21       |                    |
|                                                                      | 22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L |                          | 22       |                    |
|                                                                      | 23 Secured mortgages and notes payable to unrelated third parties                                                                                                       |                          | 23       |                    |
|                                                                      | 24 Unsecured notes and loans payable                                                                                                                                    |                          | 24       |                    |
|                                                                      | 25 Other liabilities. Complete Part X of Schedule D                                                                                                                     |                          | 25       |                    |
|                                                                      | 26 <b>Total liabilities.</b> Add lines 17 through 25                                                                                                                    | 0.                       | 26       | 0.                 |
| <b>NET ASSETS OR FUND BALANCES</b>                                   | Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29 and lines 33 and 34.                                |                          |          |                    |
|                                                                      | 27 Unrestricted net assets                                                                                                                                              | 148,564.                 | 27       | 175,248.           |
|                                                                      | 28 Temporarily restricted net assets                                                                                                                                    |                          | 28       |                    |
|                                                                      | 29 Permanently restricted net assets                                                                                                                                    |                          | 29       |                    |
|                                                                      | Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.                                                        |                          |          |                    |
|                                                                      | 30 Capital stock or trust principal, or current funds                                                                                                                   |                          | 30       |                    |
|                                                                      | 31 Paid-in or capital surplus, or land, building, and equipment fund                                                                                                    |                          | 31       |                    |
|                                                                      | 32 Retained earnings, endowment, accumulated income, or other funds                                                                                                     |                          | 32       |                    |
|                                                                      | 33 <b>Total net assets or fund balances.</b>                                                                                                                            | 148,564.                 | 33       | 175,248.           |
|                                                                      | 34 <b>Total liabilities and net assets/fund balances.</b>                                                                                                               | 148,564.                 | 34       | 175,248.           |

**Part XI Financial Statements and Reporting**

- 1 Accounting method used to prepare the Form 990 ☒ Cash ☐ Accrual ☐ Other
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant?
- b Were the organization's financial statements audited by an independent accountant?
- c If 'Yes' to 2a or 2b, 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?
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b If 'Yes,' did the organization undergo the required audit or audits?

|    | Yes | No |
|----|-----|----|
| 2a |     | X  |
| 2b |     | X  |
| 2c |     |    |
| 3a |     | X  |
| 3b |     |    |

BAA

Form 990 (2008)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

## Public Charity Status and Public Support

**To be completed by all section 501 (c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.**

2008

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization

Employer identification number

NORTH AMERICAN BLUEBIRD SOCIETY, INC.

52-1118450

|                                                                                                                |  |
|----------------------------------------------------------------------------------------------------------------|--|
| <b>Part 1 Reason for Public Charity Status</b> (All organizations must complete this part.) (see instructions) |  |
|----------------------------------------------------------------------------------------------------------------|--|

The organization is not a private foundation because it is (Please check only **one** organization.)

- 1 ☐ A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
- 3 ☐ A hospital or cooperative hospital service organization described in **section 170(b)(1)(A)(iii).** (Attach Schedule H.)
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☒ An organization that normally receives (1) more than 33-1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).** (see instructions)
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☐ Type I      b ☐ Type II      c ☐ Type III — Functionally integrated      d ☐ Type III — Other
- e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f ☐ If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box \_\_\_\_\_
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons? ☐

|            | Yes | No |
|------------|-----|----|
| 11 g (i)   |     |    |
| 11 g (ii)  |     |    |
| 11 g (iii) |     |    |

#### h. Provide the following information about the organizations the organization supports

[illegible]

**BAA** For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule A (Form 990 or 990-EZ) 2008

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in) ▶                                                                                                                                                                          | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants'.)                                                                                                                 |          |          |          |          |          |           |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf                                                                                                            |          |          |          |          |          |           |
| <b>3</b> The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge. |          |          |          |          |          |           |
| <b>4 Total.</b> Add lines 1-3                                                                                                                                                                                          |          |          |          |          |          |           |
| <b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)           |          |          |          |          |          |           |
| <b>6 Public support.</b> Subtract line 5 from line 4                                                                                                                                                                   |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ▶                                                                                                                                                                     | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>7</b> Amounts from line 4                                                                                                                                                                                      |          |          |          |          |          |           |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources                                                                           |          |          |          |          |          |           |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on                                                                                                       |          |          |          |          |          |           |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)                                                                                                         |          |          |          |          |          |           |
| <b>11 Total support.</b> Add lines 7 through 10                                                                                                                                                                   |          |          |          |          |          |           |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) ...                                                                                                                                     |          |          |          |          | 12       |           |
| <b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. <input type="checkbox"/> |          |          |          |          |          |           |

**Section C. Computation of Public Support Percentage**

|                                                                                                                                                                                                                                                                                                                                                                                                                                 |    |   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---|
| <b>14</b> Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))                                                                                                                                                                                                                                                                                                                                | 14 | % |
| <b>15</b> Public support percentage for 2007 Schedule A, Part IV-A, line 26f                                                                                                                                                                                                                                                                                                                                                    | 15 | % |
| <b>16a 33-1/3 support test – 2008.</b> If the organization did not check the box on line 13, and the line 14 is 33-1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization. <input type="checkbox"/>                                                                                                                                                                       |    |   |
| <b>b 33-1/3 support test – 2007.</b> If the organization did not check a box on line 13, or 16a, and line 15 is 33-1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization. <input type="checkbox"/>                                                                                                                                                                       |    |   |
| <b>17a 10%-facts-and-circumstances test – 2008.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. <input type="checkbox"/>    |    |   |
| <b>b 10%-facts-and-circumstances test – 2007.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. <input type="checkbox"/> |    |   |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. <input type="checkbox"/>                                                                                                                                                                                                                                                          |    |   |

BAA

Schedule A (Form 990 or 990-EZ) 2008

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I.)

**Section A. Public Support**

| Calendar year (or fiscal yr beginning in) ▶                                                                                                                                             | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions and membership fees received (Do not include 'unusual grants'.)                                                                                   | 50,516.  | 64,371.  | 75,007.  | 7,663.   | 58,024.  | 255,581.  |
| <b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt purpose         |          |          |          |          |          | 0.        |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513                                                                                   |          |          |          |          |          | 0.        |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf                                                                                |          |          |          |          |          | 0.        |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge                                                                        |          |          |          |          |          | 0.        |
| <b>6 Total.</b> Add lines 1-5                                                                                                                                                           | 50,516.  | 64,371.  | 75,007.  | 7,663.   | 58,024.  | 255,581.  |
| <b>7a</b> Amounts included on lines 1, 2, 3 received from disqualified persons                                                                                                          | 0.       | 0.       | 0.       | 0.       | 0.       | 0.        |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000 | 0.       | 0.       | 0.       | 0.       | 0.       | 0.        |
| <b>c</b> Add lines 7a and 7b                                                                                                                                                            | 0.       | 0.       | 0.       | 0.       | 0.       | 0.        |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)                                                                                                                                |          |          |          |          |          | 255,581.  |

**Section B. Total Support**

| Calendar year (or fiscal yr beginning in) ▶                                                                                                                                                                       | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6                                                                                                                                                                                      | 50,516.  | 64,371.  | 75,007.  | 7,663.   | 58,024.  | 255,581.  |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources                                                                         | 1,013.   | 975.     | 3,883.   | 596.     | 4,000.   | 10,467.   |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                                                                                                  |          |          |          |          |          | 0.        |
| <b>c</b> Add lines 10a and 10b                                                                                                                                                                                    | 1,013.   | 975.     | 3,883.   | 596.     | 4,000.   | 10,467.   |
| <b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on                                                                             | 494.     | -836.    | 2,238.   | 1,059.   | 2,205.   | 5,160.    |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) See Part IV                                                                                             | 2,394.   | 1,315.   |          |          |          | 3,709.    |
| <b>13 Total support.</b> (add lns 9, 10c, 11, and 12)                                                                                                                                                             |          |          |          |          |          | 274,917.  |
| <b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. <input type="checkbox"/> |          |          |          |          |          |           |

**Section C. Computation of Public Support Percentage**

|                                                                                                  |    |        |
|--------------------------------------------------------------------------------------------------|----|--------|
| <b>15</b> Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f)) | 15 | 93.0 % |
| <b>16</b> Public support percentage from 2007 Schedule A, Part IV-A, line 27g                    | 16 | 0.0 %  |

**Section D. Computation of Investment Income Percentage**

|                                                                                                       |    |       |
|-------------------------------------------------------------------------------------------------------|----|-------|
| <b>17</b> Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f)) | 17 | 3.8 % |
| <b>18</b> Investment income percentage from 2007 Schedule A, Part IV-A, line 27h                      | 18 | 0.0 % |

**19a 33-1/3 support tests – 2008.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization. ☒

**b 33-1/3 support tests – 2007.** If the organization did not check a box on line 14 or 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization. ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

## Part IV

**Part IV** **Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10, Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. (see instructions)

[illegible]

NORTH AMERICAN BLUEBIRD SOCIETY, INC.

52-1118450

## Part III, Line 12 - Other Income

| <u>Nature and Source</u> | <u>2008</u>  | <u>2007</u>  | <u>2006</u>  | <u>2005</u>      | <u>2004</u>      |
|--------------------------|--------------|--------------|--------------|------------------|------------------|
| ADVERTISING              |              |              |              | 1,315.           | 2,394.           |
| Total                    | <u>\$ 0.</u> | <u>\$ 0.</u> | <u>\$ 0.</u> | <u>\$ 1,315.</u> | <u>\$ 2,394.</u> |

**SCHEDULE O**  
(Form 990)

**Supplemental Information to Form 990**

OMB No 1545-0047

**2008**

Department of the Treasury  
Internal Revenue Service

► Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

Open to Public Inspection

Name of the organization

NORTH AMERICAN BLUEBIRD SOCIETY, INC.

Employer identification number

52-1118450

**Form 990, Part VI, Line 10 - Form 990 Review Process**

No review was or will be conducted.

## **North American Bluebird Society - Board of Directors**

### **All Volunteers (serving without compensation, benefit plan or expense account)**

Jonathan Ridgeway, PO Box 282, Clintondale, NY 12515 - President - 30 hours/week

Brian Swanson, 13302 Fieldstone Way Gainesville, VA 20155-6616 - Vice President - 20 hours/week

Sherry Linn, 18588 Old Richter Pass Road, Osoyoos, BC V0H 1V5 Canada - Vice President in 2008 & 2009 (joined Board in 2008) - 20 hours/week

Phil Berry, 4116 Longwood Circle, Gulf Breeze, FL 32563 - Vice President in 2007 - 5 hours/week

Greg Beavers, 8365 S. Old State Road 37, Bloomington, IN 47403 - Treasurer - 20 hours/week

Lynne Ridgeway, PO Box 282, Clintondale, NY 12515 - Secretary - 20 hours/week

Bob Benson, PO Box 11, South Easton, MA 02375 - Director - 5 hours/week

Barbara Chambers, 8911 Moreland Lane, Annandale, VA 22003 - Director - 5 hours/week - (joined Board in 2009)

Tom Comfort, 1100 S. East Torch Lake Drive, Bellaire, MI 49615 - Director - 2 hours/week - (joined Board in 2008)

Bernie Daniel, 9211 Solon Dr., Cincinnati, OH 45242-4617 - Director - 2 hours/week

Jimmy Dodson, PO Box 71, Rougemont, NC 27572 - Director - 1 hour/week - (not on Board in 2009)

Walter Mugdan, 251-31 42<sup>nd</sup> Ave, Little Neck, NY 11363 - Director - 1 hour/week

Terry Neumyer, Box 4621, Harrisburg, PA 17111 - Director - 1 hour/week - (joined Board in 2008)

John Schuster, 1179 Debbie Hill Rd., Cotati, CA 94931 - Director - 1 hour/week

Dan Sparks, 2634 Scarce O Fat Ridge Rd., Nashville, IN 47448 - Director - 5 hours/week

Anne Sturm, PO Box 341, Barnesville, Maryland 20838 - Director - 5 hours/week - (joined Board in 2008)

Dick Tuttle, 311 W. Central Ave. Delaware, OH 43015 - Director - 1 hour/week

Bet Zimmerman, 15 Shaw Rd, Woodstock Valley, CT 06282-2623 - Director - 5 hours/week - (joined Board in 2008)