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efile GRAPHIC print - DO NOT PROCESS LATEST DATA - Production DLN: 93493135024069 OMB No. 1545-0047 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) Department of the Treasury Open to Public Internal Revenue Service The organization may have to use a copy of this return to satisfy state reporting requirements. Inspection For the 2008 calendar year, or tax year beginning 01-01-2008 and ending 12-31-2008 C Name of organization D Employer identification number B Check if applicable Please SITKA SUMMER MUSIC FESTIVAL FOUNDATION use IRS \_\_ Address change 92-0082681 label or Doing Business As E Telephone number Name change print or type. See (907) 747-6774 Initial return Specific Number and street (or P.O box if mail is not delivered to street address) Room/suite Instruc-PO BOX 201988 G Enter gross receipts \$ 31,293 Termination tions. Amended return City or town, state or country, and ZIP + 4 ANCHORAGE, AK 99520 Application pending Name and address of principal officer: ROBERTA RINEHART H(a) Is this a group return for PO BOX 201988 affiliates? ANCHORAGE, AK 99520 Tax-exempt status **1** 501(c) (3) **4** (insert no.) **1** 4947(a)(1) or **1** 527 H(b) Are all affiliates included? Yes No (If "No," attach a list. See instructions.) Web site: ➤ N/A H(c) Group exemption number ▶ K Type of organization. ✓ Corporation Trust Association Other L Year of Formation 1981 M State of legal domicile AK Part I Summary Briefly describe the organization's mission or most significant activities: THIS ORGANIZATION PROVIDES SUPPORT FOR THE SITKA SUMMER MUSIC FESTIVAL, INC.. THE FESTIVAL FUNDS A SERIES OF SUMMER, FALL AND WINTER CHAMBER MUSIC CONCERTS IN ALASKA. See Additional Data Table Activities & Governance See Additional Data Table See Additional Data Table See Additional Data Table Check this box ▶ if the organization discontinued its operations or disposed of more than 25% of its assets. Number of voting members of the governing body (Part VI, line 1a) . . . Number of independent voting members of the governing body (Part VI, line 1b) . 7 Total number of employees (Part V, line 2a) . . . . 0 Total number of volunteers (estimate if necessary) . . . 35 Total gross unrelated business revenue from Part VIII, line 12, column (C) . . . 0 Net unrelated business taxable income from Form 990-T, line 34 . . . **Prior Year Current Year** 8 1,670 9 Program service revenue (Part VIII, line 2g) . . . . . . Investment income (Part VIII, column (A), lines 3, 4, and 7d, ) . . . . 180.971 -440,370 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, and 10c, and 11e) 0 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line **512** 181,518 -438,700 13 45,000 Grants and similar amounts paid (Part IX, column (A), lines 1-3). 45,500 **J**J14 Benefits paid to or for members (Part IX, column (A), line 4) . . . . 0 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 0 **⊄**16a Professional fundraising fees (Part IX, column (A), line 11e) . . . . Total fundraising expenses (Part IX, column (D), line 25)  $\triangleright$ 0 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) . . . . 30,744 29,598 18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) 76,244 74,598 Revenue less expenses. Subtract line 18 from line 12 . . . . . . . . 19 105,274 -513,298 Beginning of Year End of Year 20 Total assets (Part X, line 16) . . . . . . 1,301,945 788,649

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**SCHEDULE A** 

(Form 990 or 990EZ)

**Public Charity Status and Public Support** 

OMB No 1545-0047

2008

| Department of the Treasury  |   |   | To be completed by all section $501(c)(3)$ organizations and section $4947(a)(1)$                  |  |  |               |   |             |  |              |                             | <b>2000</b> |         |  |  |
|---|---|---|--|--|--|---------------|---|-------------|--|--------------|-----------------------------|-------------|---------|--|--|
|   |   |   | nonexempt charitable trusts.   |  |  |               |   |             |  |              | Open to Public              |             |         |  |  |
| Interna   | Revenu  | e Service   | <b>▶</b> Atta  | ch to Form 990 or Form   | n 990-E  | z. ▶ See      | separate  | instruct    | ions.  |              | Ins                         | specti      | on      |  |  |
| Name of the organization  |   |   |  |  |  |               |   |             | Employer identification number                         |              |                             |             |         |  |  |
| SITKA   | SUMM  | ER MUSIC FESTIV   | AL FOUNDATION  | DUNDATION  |  |               |   |             | 02.0093691   |              |                             |             |         |  |  |
|   |   |   | 92-0082681  or Public Charity Status (to be completed by all organizations) (See Instructions)     |  |  |               |   |             |  |              |                             |             |         |  |  |
|   | 1 E F   | Reason to   | r Public Charit  | y Status (to be compi  | eted by  | all orgal     | able box  | ) (See 1    | istructio  | )IIS)        |                             |             |         |  |  |
|   | -   |   |  | because it is (Please che  |  |               |   |             | (  |              |                             |             |         |  |  |
| 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 a cooperative hospital service organization described in section 170(b)(1)(A)(iii). (Attach Schedule H)                         |  |  |  |               |   |             |  |              |                             |             |         |  |  |
| 4   | Γ   | 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   |  |  |  |               |   |             |  |              |                             |             |         |  |  |
| 6   | _   | A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).  |  |  |  |               |   |             |  |              |                             |             |         |  |  |
| 7 $\Gamma$ An organization that normally receives a substantial part of its support from a governmental unit or from the gene |   |   |  |  |  |               |   | general pu  | blic describ   | ed in        |                             |             |         |  |  |
|   |   | section 170(b   |  |  |  |               |   |             |  |              |                             |             |         |  |  |
| 8   | $\Gamma$  | A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)  |  |  |  |               |   |             |  |              |                             |             |         |  |  |
| 9   |   |   |  |  |  |               |   |             |  | s, and gross |                             |             |         |  |  |
|   |   | receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 331/3% 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 <b>509(a)(2).</b> (Complete Part III )   |  |  |  |               |   |             |  |              |                             |             |         |  |  |
| 10  | Γ-  | 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 to test for public safety see section 309(a)(4). (see instruction organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the |   |  |  |  |               |   |             |  | -            | ocac of                     | 000 00      |         |  |  |
| -1  | ,-  |   |  |  | tion 509(a)(1) or section 509(a)(2) See <b>section 509(a)(3).</b> Check the box that |               |   |             |  |              |                             |             |         |  |  |
|   |   | describes the   | type of supporting   | e of supporting organization and complete lines 11e through 11h  |  |               |   |             |  |              |                             |             |         |  |  |
|   |   | а 🔽 Тур   |  | * *  |  | nally Inte    | _   |             |  | Type III     |                             |             |         |  |  |
| e   | 1   | By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than |  |  |  |               |   |             |  |              |                             |             | er than |  |  |
| f   | foundation managers and other than one or more publicly supported organizations desc<br>If the organization received a written determination from the IRS that it is a Type I, Typ  |   |  |  |  |               |   | escribed ii | d in section 509(a)(1) or section 509(a)(2)            |              |                             |             |         |  |  |
| •   |   | this box  | acion received a w   |  |  | נוומנ ונ וס נ |   | Type II of  | ype III  | Supportii    | ng organiza                 |             | T CK    |  |  |
| g   |   |   |  | organization accepted an   | y gift or o  | contributi    | on fr <mark>o</mark> m a                                    | ny of the   |  |              |                             | •           | •       |  |  |
|   |   | following pers  |  |  |  |               |   |             |  |              | 1                           |             |         |  |  |
|   |   |   |  | rectly controls, either alo                                      | _  |               | n persons   | described   | (וו) חו נ  |              |                             | Yes         | No      |  |  |
|   |   | and (III) below, the governing body of the the supported organization?  |  |  |  |               |   |             |  |              | 11g(i)                      |             | No      |  |  |
|   |   | (ii) A family member of a person described in (i) above?  |  |  |  |               |   |             |  |              | 11g(ii)                     |             | No      |  |  |
|   |   |   | •  | a person described in (i)  | ٠,   |               | •   |             |  |              | 11g(iii)                    |             | No      |  |  |
| h   |   | Provide the fo  | llowing informatio   | n about the organizations  | the orga   | nization s    | supports.   |             |  |              |                             |             |         |  |  |
|   |   |   | · · · · · · · · · · · · · · · · · · ·  | r  | т——  |               |   |             |  |              |                             |             |         |  |  |
| (i)<br>Name of Supp<br>Organizati   |   |   | (ii)<br>EIN  | (iii) Type of organization (described on lines 1- 9 above or IRC | (iv) Is the organization in (i) listed in your governing                             |               | (v) Did you notify the organization in (i) of your support? |             | (vi) Is the organization in (i) organized in the U.S.? |              | ļ                           |             |         |  |  |
|   |   | (i)<br>of Supported   |  |  |  |               |   |             |  |              |                             |             |         |  |  |
|   |   |   |  |  |  |               |   |             |  |              | (vii)<br>Amount of support? |             |         |  |  |
|   |   | anization   |  |  |  |               |   |             |  |              |                             |             |         |  |  |
|   |   |   |  | section )  |  | ment?         | nt?   |             | <del> </del> -   |              | 1                           |             |         |  |  |
| CITY  | A C11A44  | 450   | <del>                                     </del>   |  | Yes  | No            | Yes   | No          | Yes  | No           |                             |             |         |  |  |
| SITKA SUMMER<br>MUSIC FESTIVAL  |   |   | 030075460  |  |  |               |   |             |  |              |                             |             |         |  |  |
| INC   |   |   | 920075160  | 11a  | Yes  |               | Yes   | l           | Yes  | 1            | 1                           |             | 45000   |  |  |
|   |   | <del></del>   | <del></del>  |  | <del> </del>   | <b></b>       |   | <u> </u>    | ļ  | ļ            | L                           |             |         |  |  |

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Schedule A (Form 990 or 990-EZ) 2008

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