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Form **990**

Department of the Treasury
Internal Revenue Service

# 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)

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

OMB No. 1545-0047

**2008**

Open to Public Inspection

A For the 2008 calendar year, or tax year beginning APR 1, 2008 and ending MAR 31, 2009

B Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Termination
- ☐ Amended return
- ☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization
SOCIETY FOR VASCULAR SURGERY

Doing Business As

Number and street (or P O box if mail is not delivered to street address) 633 N. SAINT CLAIR ST. FLOOR 24 Room/suite

City or town, state or country, and ZIP + 4
CHICAGO, IL 60611

D Employer identification number
22-2990719

E Telephone number
800-258-7188

G Gross receipts $ 5,743,757.

F Name and address of principal officer REBECCA MARON
SAME AS C ABOVE

H(a) Is this a group return for affiliates? ☐ Yes ☒ No

H(b) Are all affiliates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)

I Tax-exempt status: ☒ 501(c)(6) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW.VASCULARWEB.ORG

H(c) Group exemption number ▶

K Type of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation: 1947 M State of legal domicile: IL

## Part I Summary

1 Briefly describe the organization's mission or most significant activities: TO ADVANCE THE SCIENCE AND PRACTICE OF VASCULAR SURGERY THROUGH EDUCATION, RESEARCH AND

2 Check this box ▶ ☐ if the organization discontinued its operations or disposed of more than 25% of its assets

| | | | |
|---|---|---|---|
| 3 | Number of voting members of the governing body (Part VI, line 1a) | 3 | 23 |
| 4 | Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 19 |
| 5 | Total number of employees (Part V, line 2a) | 5 | 15 |
| 6 | Total number of volunteers (estimate if necessary) | 6 | 200 |
| 7a | Total gross unrelated business revenue from Part VIII, line 12, column (C) | 7a | 28,173. |
| b | Net unrelated business taxable income from Form 990-T, line 34 | 7b | 22,164. |

RECEIVED Internal Revenue Service APR 19 2011 SB/SE COLLECTION-MIDWEST AREA CHICAGO TERRITORY GROUP 15

| | | Prior Year | Current Year |
|---|---|---|---|
| 8 | Contributions and grants (Part VIII, line 1h) | | 598,646. |
| 9 | Program service revenue (Part VIII, line 2g) | 1,666,200. | 4,874,249. |
| 10 | Investment income (Part VIII, column (A), lines 3, 4, and 7d) | 125,866. | 82,017. |
| 11 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 87,686. | 150,386. |
| 12 | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 1,879,752. | 5,705,298. |
| 13 | Grants and similar amounts paid (Part IX, column (A), lines 1-3) | 4,000. | 294,113. |
| 14 | Benefits paid to or for members (Part IX, column (A), line 4) | | |
| 15 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | 529,878. | 1,282,647. |
| 16a | Professional fundraising fees (Part IX, column (A), line 11e) | | |
| b | Total fundraising expenses (Part IX, column (D), line 25) ▶ | | |
| 17 | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) | 1,324,701. | 3,648,299. |
| 18 | Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25) | 1,858,579. | 5,225,059. |
| 19 | Revenue less expenses. Subtract line 18 from line 12 | 21,173. | 480,239. |

| | | Beginning of Year | End of Year |
|---|---|---|---|
| 20 | Total assets (Part X, line 16) | 4,948,565. | 5,101,263. |
| 21 | Total liabilities (Part X, line 26) | 1,415,331. | 1,765,552. |
| 22 | Net assets or fund balances Subtract line 21 from line 20 | 3,533,234. | 3,335,711. |

SCANNED MAY 17 2011

## Part II Signature Block

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.

Sign Here

▶ Signature of officer Date

▶ REBECCA MARON, EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer's Use Only

Preparer's signature ▶ Date Check if self-employed ▶ ☐ Preparer's identifying number (see instructions)

Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ MANN. WEITZ & ASSOCIATES L.L.C.
111 DEER LAKE ROAD, SUITE 125
DEERFIELD, IL 60015

EIN ▶

Phone no. ▶ (847)267-3400

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No



SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

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

1 Briefly describe the organization's mission. SEE SCHEDULE O FOR CONTINUATION
THE SOCIETY FOR VASCULAR SURGERY SEEKS TO ADVANCE EXCELLENCE AND INNOVATION IN VASCULAR HEALTH THROUGH EDUCATION, ADVOCACY, RESEARCH AND PUBLIC AWARENESS. THE OBJECTIVES OF THE SOCIETY SHALL BE:

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
SEE SCHEDULE O FOR CONTINUATION(S)

4a (Code ) (Expenses $ including grants of $ ) (Revenue $ )
ADVOCACY AND GOVERNMENT SPENDING - TO LOBBY GOVERNMENT ORGANIZATIONS FOR A WIDER RECOGNITION OF AND MEDICARE COVERAGE FOR VASCULAR DISEASES AND TREATMENT. AS A RESULT OF THE ORGANIZATION'S LOBBYING, CONGRESS IS REVIEWING LEGISLATION THAT WILL BROADEN COVERAGE FOR AORTIC ANEURYSM SCREENING FOR AT-RISK MEDICARE RECIPIENTS. WHEN THE ORIGINAL SAAAVE (SCREENING ABDOMINAL AORTIC ANEURYSM VERY EFFECTIVELY) BILL WAS PASSED IN 2005, IT ATTACHED AAA SCREENING TO THE "WELCOME TO MEDICARE PHYSICAL EXAM" WHICH MUST BE PERFORMED WITHIN 12 MONTHS FROM REACHING MEDICARE AGE. BECAUSE OF THIS RESTRICTION AND LACK OF EDUCATION, FEWER THAN 10,000 MEDICARE BENEFICIARIES TOOK ADVANTAGE OF AAA SCREENING IN 2007. SVS IS WORKING WITH BOTH SENATORS AND CONGRESSMEN TO BROADEN THE COVERAGE. SPECIFIC MEASURES HAVE BEEN INCLUDED IN THE VARIOUS HEALTH

4b (Code ) (Expenses $ including grants of $ ) (Revenue $ )
EDUCATION AND RESEARCH - TO PROMOTE THE STUDY AND RESEARCH OF VASCULAR DISEASES, EXPAND KNOWLEDGE OF VASCULAR DISEASES, AND ENCOURAGE THE EXPANSION OF THE FIELD. APPROXIMATELY 400 PEOPLE ATTENDED THE VARIOUS EDUCATION PROGRAMS DURING THE YEAR.

4c (Code ) (Expenses $ including grants of $ ) (Revenue $ )
ANNUAL MEETING - TO PROMOTE THE STUDY AND RESEARCH OF VASCULAR DISEASES, TO DEFINE THE ROLE OF SURGERY IN THESE DISEASES, AND TO STANDARDIZE THE METHODS OF STUDY. APPROXIMATELY 1,100 MEDICAL PROFESSIONALS ATTENDED THE ANNAUL MEETING THIS YEAR.

4d Other program services. (Describe in Schedule O)
(Expenses $ Including grants of $ ) (Revenue $ )

4e Total program service expenses ▶ $ *(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* | 1 | | X |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors? | 2 | 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* | 3 | | X |
| 4 | **Section 501(c)(3) organizations.** Did the organization engage in lobbying activities? *If "Yes," complete Schedule C, Part II* | 4 | | |
| 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* | 5 | X | |
| 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* | 6 | | 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* | 7 | | X |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III* | 8 | | 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* | 9 | | X |
| 10 | Did the organization hold assets in term, permanent, or quasi endowments? *If "Yes," complete Schedule D, Part V* | 10 | 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* | 11 | 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* | 12 | X | |
| 13 | Is the organization a school as described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E* | 13 | | X |
| 14a | Did the organization maintain an office, employees, or agents outside of the U.S.? | 14a | | 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* | 14b | 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* | 15 | | 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* | 16 | X | |
| 17 | Did the organization report more than $15,000 on Part IX, column (A), line 11e? *If "Yes," complete Schedule G, Part I* | 17 | | 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* | 18 | | X |
| 19 | Did the organization report more than $15,000 on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III* | 19 | | X |
| 20 | Did the organization operate one or more hospitals? *If "Yes," complete Schedule H* | 20 | | 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* | 21 | 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* | 22 | X | |
| 23 | Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? *If "Yes," complete Schedule J* | 23 | 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, that was issued after December 31, 2002? *If "Yes," answer questions 24b-24d and complete Schedule K. If "No", go to question 25* | 24a | | X |
| b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| 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? | 24c | | |
| d | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | 24d | | |
| 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* | 25a | | |
| 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* | 25b | | |
| 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* | 26 | | 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* | 27 | | X |

**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 | | |
| 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 |

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

| | | | | Yes | No |
|---|---|---|---|---|---|
| 1a | Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U S Information Returns Enter -0- if not applicable | 1a | 31 | | |
| b | Enter the number of Forms W-2G included in line 1a Enter -0- if not applicable | 1b | 0 | | |
| c | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? | | 1c | X | |
| 2a | 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 | 2a | 15 | | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? | | 2b | X | |
| | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to *e-file* this return (see instructions) | | | | |
| 3a | Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return? | | 3a | X | |
| b | If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O* | | 3b | X | |
| 4a | 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)? | | 4a | | X |
| b | If "Yes," enter the name of the foreign country ▶ | | | | |
| | See the instructions for exceptions and filing requirements for Form TD F 90-22 1, Report of Foreign Bank and Financial Accounts. | | | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | | 5a | | X |
| b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | 5b | | X |
| c | If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction? | | 5c | | |
| 6a | Did the organization solicit any contributions that were not tax deductible? | | 6a | X | |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | | 6b | X | |
| 7 | **Organizations that may receive deductible contributions under section 170(c).** | | | | |
| a | Did the organization provide goods or services in exchange for any quid pro quo contribution of more than $75? | | 7a | | |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | | 7b | | |
| c | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | | 7c | | |
| d | If "Yes," indicate the number of Forms 8282 filed during the year | 7d | | | |
| e | Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | | 7e | | |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | 7f | | |
| g | For all contributions of qualified intellectual property, did the organization file Form 8899 as required? | | 7g | | |
| h | For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required? | | 7h | | |
| 8 | **Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.** Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | | 8 | | |
| 9 | **Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.** | | | | |
| a | Did the organization make any taxable distributions under section 4966? | | 9a | | X |
| b | Did the organization make a distribution to a donor, donor advisor, or related person? | | 9b | | X |
| 10 | **Section 501(c)(7) organizations.** Enter: N/A | | | | |
| a | Initiation fees and capital contributions included on Part VIII, line 12 | 10a | | | |
| b | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities | 10b | | | |
| 11 | **Section 501(c)(12) organizations.** Enter: N/A | | | | |
| a | Gross income from members or shareholders | 11a | | | |
| b | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them) | 11b | | | |
| 12a | **Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041? | | 12a | | |
| b | If "Yes," enter the amount of tax-exempt interest received or accrued during the year N/A | 12b | | | |

**Part VI Governance, Management, and Disclosure** *(Sections A, B, and C request information about policies not required by the Internal Revenue Code.)*

## Section A. Governing Body and Management

| | | | Yes | No |
|---|---|---|---|---|
| | *For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O See instructions.* | | | |
| 1a | Enter the number of voting members of the governing body | 1a 23 | | |
| b | Enter the number of voting members that are independent | 1b 19 | | |
| 2 | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? | 2 | | X |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? | 3 | | X |
| 4 | Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed? | 4 | | X |
| 5 | Did the organization become aware during the year of a material diversion of the organization's assets? | 5 | | X |
| 6 | Does the organization have members or stockholders? | 6 | X | |
| 7a | Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body? | 7a | X | |
| b | Are any decisions of the governing body subject to approval by members, stockholders, or other persons? | 7b | X | |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | | |
| a | The governing body? | 8a | X | |
| b | Each committee with authority to act on behalf of the governing body? | 8b | X | |
| 9a | Does the organization have local chapters, branches, or affiliates? | 9a | | X |
| b | If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates and branches to ensure their operations are consistent with those of the organization? | 9b | | |
| 10 | Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990 | 10 | | X |
| 11 | Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O* | 11 | | X |

## Section B. Policies

| | | | Yes | No |
|---|---|---|---|---|
| 12a | Does the organization have a written conflict of interest policy? *If "No," go to line 13* | 12a | X | |
| b | Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | 12b | X | |
| c | Does the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this is done* | 12c | X | |
| 13 | Does the organization have a written whistleblower policy? | 13 | | X |
| 14 | Does the organization have a written document retention and destruction policy? | 14 | X | |
| 15 | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision. | | | |
| a | The organization's CEO, Executive Director, or top management official? | 15a | X | |
| b | Other officers or key employees of the organization? | 15b | | X |
| | Describe the process in Schedule O (see instructions) | | | |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? | 16a | | X |
| b | If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? | 16b | | |

## Section C. Disclosure

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 ▶

REBECCA MARON - 312-334-2301

633 N. SAINT CLAIR ST., CHICAGO, IL 60611

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Section A Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order, individual trustees or directors, institutional trustees; officers; key employees, highest compensated employees, and former such persons.

☐ Check this box if the organization did not compensate any officer, director, trustee, or key employee

| (A) Name and Title | (B) Average hours per week | (C) Position (check all that apply) | | | | | | (D) Reportable compensation from the organization (W-2/1099-MISC) | (E) Reportable compensation from related organizations (W-2/1099 MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| LARRY KRAISS<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| O. WILLIAM BROWN<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| JAMES SEEGER<br>DIRECTOR | 1.00 | X | | | | | | 50,250. | 0. | 0. |
| G. PATRICK CLAGETT<br>PRESIDENT | 4.00 | X | | X | | | | 0. | 0. | 0. |
| JOSEPH MILLS<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| FRANK CRIADO<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| MICHAEL DALSING<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| JOHN EIDT<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| JULIE ANN FREISHLAG<br>TREASURER | 2.00 | X | | X | | | | 0. | 0. | 0. |
| PETER GLOVICZKI<br>SECRETARY | 2.00 | X | | X | | | | 0. | 0. | 0. |
| CLAUDIO CINA<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| K. WAYNE JOHNSTON<br>PAST PRESIDENT | 1.00 | X | | X | | | | 0. | 0. | 0. |
| BLAIR KEAGY<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| PETER LAWRENCE<br>RECORDER | 3.00 | X | | | | | | 0. | 0. | 0. |
| ROBERT MCLAFFERTY<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| CLEMENT DARLING<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| GREG MONETA<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |

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

| (A) Name and title | (B) Average hours per week | (C) Position (check all that apply) | | | | | | (D) Reportable compensation from the organization (W-2/1099-MISC) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| BRUCE PERLER<br>DIRECTOR | 1.00 | X | | | | | | 18,000. | 0. | 0. |
| DANIEL WALSH<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| RONALD DALMAN<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| ANTON SIDAWY<br>PRESIDENT ELECT | 2.50 | X | | X | | | | 0. | 0. | 0. |
| CHARLES STERNBERGH<br>DIRECTOR | 0.50 | X | | | | | | 0. | 0. | 0. |
| ROBERT ZWOLAK<br>VICE PRESIDENT | 2.50 | X | | X | | | | 34,375. | 0. | 0. |
| REBECCA MARON<br>EXECUTIVE DIRECTOR | 30.00 | | | X | | | | 232,107. | 0. | 22,083. |
| PAM PHILLIPS<br>DIRECTOR, WASHINGTON OFF | 37.50 | | | | | X | | 108,342. | 0. | 9,240. |
| JILL GOODWIN<br>DIRECTOR OF COMMUNICATIO | 37.50 | | | | | X | | 92,973. | 0. | 8,988. |
| PATRICIA BURTON<br>DEPUTY EXECUTIVE DIRECTO | 37.50 | | | | | X | | 139,122. | 0. | 19,176. |
| 1b Total ▶ | | | | | | | | 675,169. | 0. | 59,487. |

2 Total number of individuals (including those in 1a) who received more than $100,000 in reportable compensation from the organization ▶ 3

| | | Yes | No |
|---|---|---|---|
| 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* | | 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* | X | |
| 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* | | X |

**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) Name and business address | (B) Description of services | (C) Compensation |
|---|---|---|
| NEW ENGLAND RESEARCH INSTITUTES, INC.<br>9 GALEN ST., WATERTOWN, MA 02472 | MANAGED THE VASCULAR REGISTRY | 253,081. |
| COLUMBIA UNIVERSITY<br>PO BOX 1505, NEW YORK, NY 10008 | LIFE LINE SCREENING DATA ANALYSIS PROJEC | 134,558. |
| | | |
| | | |
| | | |

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

Form 990 (2008) SOCIETY FOR VASCULAR SURGERY 22-2990719 Page 9

**Part VIII Statement of Revenue**

| | | | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512 513, or 514 |
|---|---|---|---|---|---|---|
| Contributions, gifts, grants and other similar amounts | 1a Federated campaigns | 1a | | | | |
| | b Membership dues | 1b | | | | |
| | c Fundraising events | 1c | | | | |
| | d Related organizations | 1d | | | | |
| | e Government grants (contributions) | 1e | | | | |
| | f All other contributions, gifts, grants, and similar amounts not included above | 1f 598,646. | | | | |
| | g Noncash contributions included in lines 1a-1f $ | | | | | |
| | h Total. Add lines 1a-1f | ▶ | 598,646. | | | |
| Program Service Revenue | | Business Code | | | | |
| | 2a ROYALTIES | 611600 | 2,075,000. | | | 2075000. |
| | b ANNUAL MEETING EXHIBIT | 611600 | 798,050. | | | 798,050. |
| | c ANNUAL MEETING | 611600 | 782,173. | 782,173. | | |
| | d MEMBERSHIP DUES | 900099 | 679,282. | 679,282. | | |
| | e EDUCATIONAL PROGRAMS | 611600 | 539,744. | 539,744. | | |
| | f All other program service revenue | | | | | |
| | g Total. Add lines 2a-2f | ▶ | 4,874,249. | | | |
| Other Revenue | 3 Investment income (including dividends, interest, and other similar amounts) | ▶ | 120,476. | | | 120,476. |
| | 4 Income from investment of tax-exempt bond proceeds | ▶ | | | | |
| | 5 Royalties | ▶ | | | | |
| | | (i) Real / (ii) Personal | | | | |
| | 6a Gross Rents | | | | | |
| | b Less rental expenses | | | | | |
| | c Rental income or (loss) | | | | | |
| | d Net rental income or (loss) | ▶ | | | | |
| | | (i) Securities / (ii) Other | | | | |
| | 7a Gross amount from sales of assets other than inventory | | | | | |
| | b Less cost or other basis and sales expenses | 38,459. | | | | |
| | c Gain or (loss) | <38,459.> | | | | |
| | d Net gain or (loss) | ▶ | <38,459.> | | | <38,459.> |
| | 8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c) See Part IV, line 18 | a | | | | |
| | b Less. direct expenses | b | | | | |
| | c Net income or (loss) from fundraising events | ▶ | | | | |
| | 9a Gross income from gaming activities See Part IV, line 19 | a | | | | |
| | b Less. direct expenses | b | | | | |
| | c Net income or (loss) from gaming activities | ▶ | | | | |
| | 10a Gross sales of inventory, less returns and allowances | a | | | | |
| | b Less cost of goods sold | b | | | | |
| | c Net income or (loss) from sales of inventory | ▶ | | | | |
| | Miscellaneous Revenue | Business Code | | | | |
| | 11a MISCELLANEOUS | 900099 | 122,213. | 122,213. | | |
| | b JOB BOARD POSTING | 900099 | 28,173. | | 28,173. | |
| | c | | | | | |
| | d All other revenue | | | | | |
| | e Total. Add lines 11a-11d | ▶ | 150,386. | | | |
| | 12 Total Revenue Add lines 1h, 2g, 3, 4, 5, 6d, 7c, 8c, 9c, 10c, and 11e | ▶ | 5,705,298. | 2,123,412. | 28,173. | 2955067. |

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Form 990 (2008)

**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).

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII. | (A) Total expenses | (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
|---|---|---|---|---|
| 1 Grants and other assistance to governments and organizations in the U.S See Part IV, line 21 | 150,000. | | | |
| 2 Grants and other assistance to individuals in the U S See Part IV, line 22 | 109,113. | | | |
| 3 Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16 | 35,000. | | | |
| 4 Benefits paid to or for members | | | | |
| 5 Compensation of current officers, directors, trustees, and key employees | 375,525. | | | |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | |
| 7 Other salaries and wages | 907,122. | | | |
| 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 | 188,617. | | | |
| b Legal | 18,390. | | | |
| c Accounting | 135,527. | | | |
| d Lobbying | | | | |
| e Professional fundraising services. See Part IV, line 17 | | | | |
| f Investment management fees | 31,500. | | | |
| g Other | 815,977. | | | |
| 12 Advertising and promotion | 15,405. | | | |
| 13 Office expenses | 240,618. | | | |
| 14 Information technology | 103,724. | | | |
| 15 Royalties | | | | |
| 16 Occupancy | 108,405. | | | |
| 17 Travel | 304,745. | | | |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| 19 Conferences, conventions, and meetings | 1,414,371. | | | |
| 20 Interest | | | | |
| 21 Payments to affiliates | | | | |
| 22 Depreciation, depletion, and amortization | 13,129. | | | |
| 23 Insurance | 8,565. | | | |
| 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 MISCELLANEOUS | 199,326. | | | |
| b ACCREDITATION | 50,000. | | | |
| c | | | | |
| d | | | | |
| e | | | | |
| f All other expenses | | | | |
| 25 Total functional expenses. Add lines 1 through 24f | 5,225,059. | | | |
| 26 Joint Costs. Check here ▶ ☐ 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 | | | | |

**Part X Balance Sheet**

| | | | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|
| Assets | 1 | Cash - non-interest-bearing | 1,136,896. | 1 | 886,143. |
| | 2 | Savings and temporary cash investments | 582,936. | 2 | 1,811,638. |
| | 3 | Pledges and grants receivable, net | 180,000. | 3 | 25,000. |
| | 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 | | 8 | |
| | 9 | Prepaid expenses and deferred charges | 273,406. | 9 | 238,211. |
| | 10a | Land, buildings, and equipment cost basis 10a 73,531. | | | |
| | b | Less accumulated depreciation. Complete Part VI of Schedule D 10b 46,556. | 15,783. | 10c | 26,975. |
| | 11 | Investments - publicly traded securities | 2,713,950. | 11 | 2,104,955. |
| | 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 | 45,594. | 15 | 8,341. |
| | 16 | Total assets. Add lines 1 through 15 (must equal line 34) | 4,948,565. | 16 | 5,101,263. |
| Liabilities | 17 | Accounts payable and accrued expenses | 138,210. | 17 | 241,295. |
| | 18 | Grants payable | | 18 | |
| | 19 | Deferred revenue | 1,261,666. | 19 | 1,520,125. |
| | 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 | 15,455. | 25 | 4,132. |
| | 26 | Total liabilities. Add lines 17 through 25 | 1,415,331. | 26 | 1,765,552. |
| Net Assets or Fund Balances | | **Organizations that follow SFAS 117, check here ▶ [X] and complete lines 27 through 29, and lines 33 and 34.** | | | |
| | 27 | Unrestricted net assets | 3,080,123. | 27 | 3,014,958. |
| | 28 | Temporarily restricted net assets | 228,111. | 28 | 95,753. |
| | 29 | Permanently restricted net assets | 225,000. | 29 | 225,000. |
| | | **Organizations that do not follow SFAS 117, check here ▶ [ ] 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, or equipment fund | | 31 | |
| | 32 | Retained earnings, endowment, accumulated income, or other funds | | 32 | |
| | 33 | Total net assets or fund balances | 3,533,234. | 33 | 3,335,711. |
| | 34 | Total liabilities and net assets/fund balances | 4,948,565. | 34 | 5,101,263. |

**Part XI Financial Statements and Reporting**

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Accounting method used to prepare the Form 990 | [ ] Cash [X] Accrual [ ] Other | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | 2a | | X |
| b | Were the organization's financial statements audited by an independent accountant? | 2b | X | |
| c | If "Yes" to lines 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? | 2c | | X |
| 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? | 3a | | X |
| b | If "Yes," did the organization undergo the required audit or audits? | 3b | | |

Schedule A (Form 990 or 990 EZ) 2009 AMERICAN VASCULAR ASSOCIATION FOUNDATION04-3580038 Page 2

**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) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants") | 1107588. | 1043434. | 134,529. | 1430291. | 1028260. | 4744102. |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 4 Total. Add lines 1 through 3 | 1107588. | 1043434. | 134,529. | 1430291. | 1028260. | 4744102. |
| 5 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) | | | | | | 2387661. |
| 6 Public support. Subtract line 5 from line 4 | | | | | | 2356441. |

## Section B. Total Support

| Calendar year (or fiscal year beginning in) ▶ | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|---|---|---|---|---|---|---|
| 7 Amounts from line 4 | 1107588. | 1043434. | 134,529. | 1430291. | 1028260. | 4744102. |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | 109,026. | 125,371. | 66,937. | 152,823. | 166,967. | 621,124. |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on | | | | | | |
| 10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV.) | 29,446. | 216. | | 2,751. | | 32,413. |
| 11 Total support. Add lines 7 through 10 | | | | | | 5397639. |

12 Gross receipts from related activities, etc (see instructions) . . . . . 12

13 First five years. 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 . . . . . ▶ ☐

## Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f)) . . . . . 14 43.66 %

15 Public support percentage from 2008 Schedule A, Part II, line 14 . . . . . 15 63.57 %

16a 33 1/3% support test - 2009. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here The organization qualifies as a publicly supported organization . . . . . ▶ ☒

b 33 1/3% support test - 2008. 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 . . . . . ▶ ☐

17a 10% -facts-and-circumstances test - 2009. 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 . ▶ ☐

b 10% -facts-and-circumstances test - 2008. 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 . ▶ ☐

18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ ☐



MA

**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 year beginning in) ▶ | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") | | | | | | |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513 | | | | | | |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 6 **Total** Add lines 1 through 5 | | | | | | |
| 7a Amounts included on lines 1, 2, and 3 received from disqualified persons | | | | | | |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year | | | | | | |
| c Add lines 7a and 7b | | | | | | |
| 8 Public support (Subtract line 7c from line 6) | | | | | | |

## Section B. Total Support

| Calendar year (or fiscal year beginning in) ▶ | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|---|---|---|---|---|---|---|
| 9 Amounts from line 6 | | | | | | |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | | | | | | |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 | | | | | | |
| c Add lines 10a and 10b | | | | | | |
| 11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on | | | | | | |
| 12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV.) | | | | | | |
| 13 Total support (Add lines 9, 10c, 11, and 12.) | | | | | | |

14 **First five years** 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** ▶ ☐

## Section C. Computation of Public Support Percentage

| | | |
|---|---|---|
| 15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f)) | 15 | % |
| 16 Public support percentage from 2008 Schedule A, Part III, line 15 | 16 | % |

## Section D. Computation of Investment Income Percentage

| | | |
|---|---|---|
| 17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f)) | 17 | % |
| 18 Investment income percentage from 2008 Schedule A, Part III, line 17 | 18 | % |

19a **33 1/3% support tests - 2009.** 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 - 2008.** If the organization did not check a box on line 14 or line 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 ▶ ☐

SCHEDULE C (Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

# Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ To be completed by organizations described below.
▶ Attach to Form 990 or Form 990-EZ.

OMB No 1545-0047

**2008**

Open to Public Inspection

**If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then**

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations. Complete Parts I-A and C below Do not complete Part I B
- Section 527 organizations. Complete Part I-A only.

**If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)). Complete Part II A. Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II A

**If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax), then**

- Section 501(c)(4), (5), or (6) organizations Complete Part III

| Name of organization | Employer identification number |
|---|---|
| SOCIETY FOR VASCULAR SURGERY | 22-2990719 |

## Part I-A To be completed by all organizations exempt under section 501(c) and section 527 organizations.

See the instructions for Schedule C for details.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV

2 Political expenditures ▶ $

3 Volunteer hours

## Part I-B To be completed by all organizations exempt under section 501(c)(3).

See the instructions for Schedule C for details.

1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ $

2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ $

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No

4a Was a correction made? ☐ Yes ☐ No

b If "Yes," describe in Part IV.

## Part I-C To be completed by all organizations exempt under section 501(c), except section 501(c)(3).

See the instructions for Schedule C for details.

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ $

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ $

3 Total of direct and indirect exempt function expenditures Add lines 1 and 2 and enter here and on Form 1120-POL, line 17b ▶ $

4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No

5 State the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made Enter the amount paid and indicate if the amount was paid from the filing organization's funds or were political contributions received and promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV

| (a) Name | (b) Address | (c) EIN | (d) Amount paid from filing organization's funds If none, enter -0-. | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-. |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Schedule C (Form 990 or 990 EZ) 2008 SOCIETY FOR VASCULAR SURGERY 22-2990719 Page 2

**Part II-A** **To be completed by organizations exempt under section 501(c)(3) that filed Form 5768 (election under section 501(h)).** See the instructions for Schedule C for details.

A Check ▶ ☐ if the filing organization belongs to an affiliated group.

B Check ▶ ☐ if the filing organization checked box A and "limited control" provisions apply

| Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.) | (a) Filing organization's totals | (b) Affiliated group totals |
|---|---|---|
| 1a Total lobbying expenditures to influence public opinion (grassroots lobbying) | | |
| b Total lobbying expenditures to influence a legislative body (direct lobbying) | | |
| c Total lobbying expenditures (add lines 1a and 1b) | | |
| d Other exempt purpose expenditures | | |
| e Total exempt purpose expenditures (add lines 1c and 1d) | | |
| f Lobbying nontaxable amount Enter the amount from the following table in both columns | | |
| g Grassroots nontaxable amount (enter 25% of line 1f) | | |
| h Subtract line 1g from line 1a. Enter 0- if line g is more than line a | | |
| i Subtract line 1f from line 1c Enter 0- if line f is more than line c | | |

| If the amount on line 1e, column (a) or (b) is: | The lobbying nontaxable amount is: |
|---|---|
| Not over $500,000 | 20% of the amount on line 1e |
| Over $500,000 but not over $1,000,000 | $100,000 plus 15% of the excess over $500,000 |
| Over $1,000,000 but not over $1,500,000 | $175,000 plus 10% of the excess over $1,000,000 |
| Over $1,500,000 but not over $17,000,000 | $225,000 plus 5% of the excess over $1,500,000 |
| Over $17,000,000 | $1,000,000 |

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ Yes ☐ No

**4-Year Averaging Period Under Section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f of the instructions.)

**Lobbying Expenditures During 4-Year Averaging Period**

| Calendar year (or fiscal year beginning in) | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) Total |
|---|---|---|---|---|---|
| 2a Lobbying non-taxable amount | | | | | |
| b Lobbying ceiling amount (150% of line 2a, column(e)) | | | | | |
| c Total lobbying expenditures | | | | | |
| d Grassroots non-taxable amount | | | | | |
| e Grassroots ceiling amount (150% of line 2d, column (e)) | | | | | |
| f Grassroots lobbying expenditures | | | | | |

Schedule C (Form 990 or 990-EZ) 2008

832042 12-16-08

**Part II-B** **To be completed by organizations exempt under section 501(c)(3) that have NOT filed Form 5768 (election under section 501(h)).** See the instructions for Schedule C for details

| | | (a) Yes | (a) No | (b) Amount |
|---|---|---|---|---|
| 1 | During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of. | | | |
| a | Volunteers? | | | |
| b | Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? | | | |
| c | Media advertisements? | | | |
| d | Mailings to members, legislators, or the public? | | | |
| e | Publications, or published or broadcast statements? | | | |
| f | Grants to other organizations for lobbying purposes? | | | |
| g | Direct contact with legislators, their staffs, government officials, or a legislative body? | | | |
| h | Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means? | | | |
| i | Other activities? If "Yes," describe in Part IV | | | |
| j | Total lines 1c through 1i | | | |
| 2a | Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? | | | |
| b | If "Yes," enter the amount of any tax incurred under section 4912 | | | |
| c | If "Yes," enter the amount of any tax incurred by organization managers under section 4912 | | | |
| d | If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? | | | |

**Part III-A** **To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).** See the instructions for Schedule C for details

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Were substantially all (90% or more) dues received nondeductible by members? | 1 | | X |
| 2 | Did the organization make only in-house lobbying expenditures of $2,000 or less? | 2 | | X |
| 3 | Did the organization agree to carryover lobbying and political expenditures from the prior year? | 3 | | X |

**Part III-B** **To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered "No" OR if Part III-A, question 3 is answered "Yes."** See Schedule C instructions for details

| | | | |
|---|---|---|---|
| 1 | Dues, assessments and similar amounts from members | 1 | 679,282. |
| 2 | Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). | | |
| a | Current year | 2a | 169,528. |
| b | Carryover from last year | 2b | |
| c | Total | 2c | 169,528. |
| 3 | Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues | 3 | 203,785. |
| 4 | If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? | 4 | |
| 5 | Taxable amount of lobbying and political expenditures (line 2c total minus 3 and 4) | 5 | <34,257.> |

**Part IV** **Supplemental Information**

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5; and Part II-B, line 1i Also, complete this part for any additional information

# Schedule D (Form 990)

Department of the Treasury
Internal Revenue Service

## Supplemental Financial Statements

▶ Attach to Form 990 To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No 1545-0047

**2008**

Open to Public Inspection

Name of the organization: SOCIETY FOR VASCULAR SURGERY

Employer identification number: 22-2990719

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6

| | | (a) Donor advised funds | (b) Funds and other accounts |
|---|---|---|---|
| 1 | Total number at end of year | | |
| 2 | Aggregate contributions to (during year) | | |
| 3 | Aggregate grants from (during year) | | |
| 4 | Aggregate value at end of year | | |

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? ☐ Yes ☐ No

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or pleasure)
☐ Protection of natural habitat
☐ Preservation of open space
☐ Preservation of an historically important land area
☐ Preservation of certified historic structure

2 Complete lines 2a-2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

| | | Held at the End of the Year |
|---|---|---|
| a | Total number of conservation easements | 2a |
| b | Total acreage restricted by conservation easements | 2b |
| c | Number of conservation easements on a certified historic structure included in (a) | 2c |
| d | Number of conservation easements included in (c) acquired after 8/17/06 | 2d |

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ $ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**
Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 ▶ $ _____

(ii) Assets included in Form 990, Part X ▶ $ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 ▶ $ _____

b Assets included in Form 990, Part X ▶ $ _____

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** *(continued)*

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange programs
e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Trust, Escrow and Custodial Arrangements** Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

| | | Amount |
|---|---|---|
| c | Beginning balance | 1c |
| d | Additions during the year | 1d |
| e | Distributions during the year | 1e |
| f | Ending balance | 1f |

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV.

**Part V Endowment Funds.** Complete if organization answered "Yes" to Form 990, Part IV, line 10.

| | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|---|---|---|---|---|---|
| 1a Beginning of year balance | 225,000. | | | | |
| b Contributions | | | | | |
| c Investment earnings or losses | | | | | |
| d Grants or scholarships | | | | | |
| e Other expenditures for facilities and programs | | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | 225,000. | | | | |

2 Provide the estimated percentage of the year end balance held as

a Board designated or quasi-endowment ▶ _____ %
b Permanent endowment ▶ 100.00 %
c Term endowment ▶ _____ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

| | Yes | No |
|---|---|---|
| (i) unrelated organizations 3a(i) | | X |
| (ii) related organizations 3a(ii) | | X |

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? 3b

4 Describe in Part XIV the intended uses of the organization's endowment funds

**Part VI Investments - Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

| Description of investment | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Depreciation | (d) Book value |
|---|---|---|---|---|
| 1a Land | | | | |
| b Buildings | | | | |
| c Leasehold improvements | | | | |
| d Equipment | | 73,531. | 46,556. | 26,975. |
| e Other | | | | |
| Total. Add lines 1a-1e *(Column (d) should equal Form 990, Part X, column (B), line 10(c).)* ▶ | | | | 26,975. |

Schedule D (Form 990) 2008

832052
12-23-08

**Part VII Investments - Other Securities.** See Form 990, Part X, line 12

| (a) Description of security or category (including name of security) | (b) Book value | (c) Method of valuation Cost or end-of-year market value |
|---|---|---|
| Financial derivatives and other financial products | | |
| Closely held equity interests | | |
| Other | | |
| Total (Col (b) should equal Form 990, Part X, col (B) line 12 ) ▶ | | |

**Part VIII Investments - Program Related.** See Form 990, Part X, line 13

| (a) Description of investment type | (b) Book value | (c) Method of valuation. Cost or end of year market value |
|---|---|---|
| Total (Col (b) should equal Form 990, Part X, col (B) line 13.) ▶ | | |

**Part IX Other Assets.** See Form 990, Part X, line 15

| (a) Description | (b) Book value |
|---|---|
| Total. *(Column (b) should equal Form 990, Part X, col (B) line 15 )* ▶ | |

**Part X Other Liabilities.** See Form 990, Part X, line 25

| (a) Description of liability | (b) Amount |
|---|---|
| Federal income taxes | |
| DUE TO RELATED ORGANIZATION | 4,132. |
| Total. *(Column (b) should equal Form 990, Part X, col (B) line 25.)* ▶ | 4,132. |

In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

**Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements**

| | | | |
|---|---|---|---|
| 1 | Total revenue (Form 990, Part VIII, column (A), line 12) | 1 | 5,705,298. |
| 2 | Total expenses (Form 990, Part IX, column (A), line 25) | 2 | 5,225,059. |
| 3 | Excess or (deficit) for the year Subtract line 2 from line 1 | 3 | 480,239. |
| 4 | Net unrealized gains (losses) on investments | 4 | <666,226.> |
| 5 | Donated services and use of facilities | 5 | |
| 6 | Investment expenses | 6 | |
| 7 | Prior period adjustments | 7 | |
| 8 | Other (Describe in Part XIV) | 8 | 4,719. |
| 9 | Total adjustments (net) Add lines 4 8 | 9 | <661,507.> |
| 10 | Excess or (deficit) for the year per financial statements. Combine lines 3 and 9 | 10 | <181,268.> |

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

| | | | | | |
|---|---|---|---|---|---|
| 1 | Total revenue, gains, and other support per audited financial statements | | | 1 | 5,057,622. |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12: | | | | |
| a | Net unrealized gains on investments | 2a | <666,226.> | | |
| b | Donated services and use of facilities | 2b | | | |
| c | Recoveries of prior year grants | 2c | | | |
| d | Other (Describe in Part XIV) | 2d | 50,050. | | |
| e | Add lines 2a through 2d | | | 2e | <616,176.> |
| 3 | Subtract line 2e from line 1 | | | 3 | 5,673,798. |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1 | | | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | 31,500. | | |
| b | Other (Describe in Part XIV) | 4b | | | |
| c | Add lines 4a and 4b | | | 4c | 31,500. |
| 5 | Total revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.) | | | 5 | 5,705,298. |

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

| | | | | | |
|---|---|---|---|---|---|
| 1 | Total expenses and losses per audited financial statements | | | 1 | 5,238,890. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25. | | | | |
| a | Donated services and use of facilities | 2a | | | |
| b | Prior year adjustments | 2b | | | |
| c | Losses reported on Form 990, Part IX, line 25 | 2c | | | |
| d | Other (Describe in Part XIV) | 2d | 45,331. | | |
| e | Add lines 2a through 2d | | | 2e | 45,331. |
| 3 | Subtract line 2e from line 1 | | | 3 | 5,193,559. |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1: | | | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | 31,500. | | |
| b | Other (Describe in Part XIV) | 4b | | | |
| c | Add lines 4a and 4b | | | 4c | 31,500. |
| 5 | Total expenses. Add lines 3 and 4c (This should equal Form 990, Part I, line 18.) | | | 5 | 5,225,059. |

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4, Part IV, lines 1b and 2b; Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b

PART XI, LINE 8 - OTHER ADJUSTMENTS:

PAC INCOME

PAC EXPENSE

PART XII, LINE 2D - OTHER ADJUSTMENTS:

PAC CONTRIBUTION REVENUE: 50050.

**Part XIV Supplemental Information** *(continued)*

PART XIII, LINE 2D - OTHER ADJUSTMENTS:

PAC EXPENSES: 45331.

# Schedule F (Form 990)

Department of the Treasury
Internal Revenue Service

## Statement of Activities Outside the United States

▶ Attach to Form 990. Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, line 15, or line 16.

OMB No 1545-0047

**2008**

Open to Public Inspection

Name of the organization

SOCIETY FOR VASCULAR SURGERY

Employer identification number

22-2990719

**Part I General Information on Activities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 14b

1 For grantmakers. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? [X] Yes [ ] No

2 For grantmakers Describe in Part IV the organization's procedures for monitoring the use of grant funds outside the United States

3 Activities per Region (Use Schedule F-1 (Form 990) if additional space is needed )

| (a) Region | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i e , fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures in region |
|---|---|---|---|---|---|
| SOUTH AMERICA | 0 | 0 | GRANT TO RECIPIENT LOCATED IN THAT REGION | EDUCATION AND RESEARCH GRANTS. | 7,000. |
| EUROPE | 0 | 0 | GRANT TO RECIPIENT LOCATED IN THAT REGION | EDUCATION AND RESEARCH GRANTS. | 14,000. |
| EAST ASIA AND THE PACIFIC | 0 | 0 | GRANT TO RECIPIENT LOCATED IN THAT REGION | EDUCATION AND RESEARCH GRANTS. | 7,000. |
| SOUTH ASIA | 0 | 0 | GRANT TO RECIPIENT LOCATED IN THAT REGION | EDUCATION AND RESEARCH GRANTS. | 7,000. |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Totals ▶ | | | | | 35,000. |

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule F (Form 990) 2008

832071
12-18-08

**Part II** Grants and Other Assistance to Organizations or Entities Outside the United States. Complete if the organization answered 'Yes' to Form 990, Part IV, line 15, for any recipient who received more than $5,000 Check this box if no one recipient received more than $5,000 ▶ ☐

Use Schedule F 1 (Form 990) if additional space is needed

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

2 Enter total number of organizations that are recognized as charities by the foreign country or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ▶

3 Enter total number of other organizations or entities ▶

Schedule F (Form 990) 2008

832072
12-18-08



04-18-'11 13:45 FROM-SVS T-381 P0022/0037 F-680

**Part III** Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 16

Use Schedule F-1 (Form 990) if additional space is needed.

| (a) Type of grant or assistance | (b) Region | (c) Number of recipients | (d) Amount of cash grant | (e) Manner of cash disbursement | (f) Amount of non-cash assistance | (g) Description of non cash assistance | (h) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|
| INTERNATIONAL SCHOLARS AWARD | SOUTH AMERICA | 1 | 7,000. | BANK DEBIT CARD UPON A/M PICKUP | 0. | | |
| INTERNATIONAL SCHOLARS AWARD | EUROPE | 2 | 14,000. | BANK DEBIT CARD UPON A/M PICKUP | 0. | | |
| INTERNATIONAL SCHOLARS AWARD | EAST ASIA AND THE PACIFIC | 1 | 7,000. | BANK DEBIT CARD UPON A/M PICKUP | 0. | | |
| INTERNATIONAL SCHOLARS AWARD | SOUTH ASIA | 1 | 7,000. | BANK DEBIT CARD UPON A/M PICKUP | 0. | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |



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**Part IV** Supplemental Information

Complete this part to provide the information required by Part I, line 2, and any other additional information

SCHEDULE F, PART I, LINE 2: INTERNATIONAL SCHOLARSHIP WINNERS ARE REQUIRED TO SUBMIT A FULL WRITTEN REPORT OF THE EXPERIENCES PROVIDED THROUGH THE SCHOLARSHIP UPON COMPLETION OF THEIR TOURS.

SCHEDULE F, PART III, COL (C): THE SVS ALWAYS PROVIDES 5 SCHOLARSHIPS.

SCHEDULE I (Form 990)

Department of the Treasury
Internal Revenue Service

# Grants and Other Assistance to Organizations, Governments, and Individuals in the U.S.

▶ Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22

▶ Attach to Form 990

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

SOCIETY FOR VASCULAR SURGERY

Employer identification number

22-2990719

**Part I** General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . [X] Yes [ ] No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

**Part II** Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than $5,000. Check this box if no one recipient received more than $5,000 Use Part IV and Schedule I 1 (Form 990) if additional space is needed ▶ [ ]

| 1 (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| AMERICAN VASCULAR ASSOCIATION FOUNDATION - 633 N. SAINT CLAIRE ST. - CHICAGO, IL 60611 | 04-3580038 | 501(C)(3) | 150,000. | 0. | | | BUDGETED SUPPORT FOR AVA'S RESEARCH GRANTS. |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

2 Enter total number of section 501(c)(3) and government organizations ▶ 1.

3 Enter total number of other organizations ▶

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832101 12-16-08



04-18-'11 13 47 FROM-SVS T-381 P0025/0037 F-680

**Part III** Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Use Schedule I-1 (Form 990) if additional space is needed

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of non-cash assistance |
|---|---|---|---|---|---|
| WOMEN'S LEADERSHIP TRAINING AWARD | 1 | 10,000. | 0. | | |
| OTHER EDUCATIONAL SCHOLARSHIPS | 47 | 47,000. | 0. | | |
| CLINICAL RESEARCH SEED GRANT | 3 | 45,000. | 0. | | |
| | | | | | |
| | | | | | |

**Part IV** Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

SCHEDULE I, PART I, LINE 2: AT THE CONCLUSION OF THE RESEARCH STUDY OR PERIOD OF TIME, THE AWARDEE MUST SUBMIT A REPORT TO THE SVS CLINICAL RESEARCH COMMITTEE.



04-18-'11 13:47 FROM-SVS T-381 P0026/0037 F-680

SCHEDULE J (Form 990)

Department of the Treasury Internal Revenue Service

# Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

OMB No 1545-0047

**2008**

Open to Public Inspection

Name of the organization

SOCIETY FOR VASCULAR SURGERY

Employer identification number

22-2990719

**Part I Questions Regarding Compensation**

| | | Yes | No |
|---|---|---|---|
| 1a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items. | | |
| | ☐ First-class or charter travel ☐ Travel for companions ☐ Tax indemnification and gross up payments ☐ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☐ Health or social club dues or initiation fees ☐ Personal services (e g , maid, chauffeur, chef) | | |
| b | If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain 1b | | |
| 2 | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a? 2 | | |
| 3 | Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply. | | |
| | ☒ Compensation committee ☐ Independent compensation consultant ☐ Form 990 of other organizations ☐ Written employment contract ☒ Compensation survey or study ☒ Approval by the board or compensation committee | | |
| 4 | During the year, did any person listed in Form 990, Part VII, Section A, line 1a. | | |
| a | Receive a severance payment or change of control payment? 4a | | X |
| b | Participate in, or receive payment from, a supplemental nonqualified retirement plan? 4b | | X |
| c | Participate in, or receive payment from, an equity based compensation arrangement? 4c | | X |
| | If "Yes" to any of lines 4a c, list the persons and provide the applicable amounts for each item in Part III | | |
| | **Only 501(c)(3) and 501(c)(4) organizations must complete lines 5-8** | | |
| 5 | For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of. | | |
| a | The organization? 5a | | |
| b | Any related organization? 5b | | |
| | If "Yes," to line 5a or 5b, describe in Part III. | | |
| 6 | For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of | | |
| a | The organization? 6a | | |
| b | Any related organization? 6b | | |
| | If "Yes" to line 6a or 6b, describe in Part III | | |
| 7 | For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III 7 | | |
| 8 | Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III 8 | | |

**Part II** Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J 1 if additional space is needed

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

| (A) Name | | (B) Breakdown of W-2 and/or 1099 MISC compensation | | | (C) Deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation reported in prior Form 990 or Form 990 EZ |
|---|---|---|---|---|---|---|---|---|
| | | (i) Base compensation | (ii) Bonus & incentive compensation | (iii) Other compensation | | | | |
| REBECCA MARON | (i) | 230,647. | 0. | 1,460. | 6,885. | 15,198. | 254,190. | 0. |
| | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| PATRICIA BURTON | (i) | 138,622. | 0. | 500. | 3,978. | 15,198. | 158,298. | 0. |
| | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
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| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |



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SCHEDULE O (Form 990)

Department of the Treasury Internal Revenue Service

# Supplemental Information to Form 990

▶ 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.

OMB No. 1545-0047

**2008**

Open to Public Inspection

Name of the organization: SOCIETY FOR VASCULAR SURGERY

Employer identification number: 22-2990719

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ADVOCACY. PROGRAMS AND ACTIVITIES INCLUDE THE VASCULAR ANNUAL MEETING AND TRADE SHOW, MONTHLY SCIENTIFIC JOURNALS, CONTINUING EDUCATION COURSES, AND VASCULAR OUTCOMES REGISTRY.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

A. TO BE A STRONG ADVOCATE FOR ITS MEMBERS IN ALL AREAS OF VASCULAR SURGERY AND ENDOVASCULAR SURGERY.

B. TO IMPROVE THE PREVENTION, DIAGNOSIS AND MANAGEMENT OF PATIENTS WITH VASCULAR DISEASE.

C. TO CLEARLY DEFINE THE ROLE OF SURGERY, ENDOVASCULAR SURGERY, MEDICAL MANAGEMENT AND INVESTIGATION IN THE TREATMENT AND PREVENTION OF THESE DISEASES.

D. TO PROMOTE CLINICAL AND BASIC RESEARCH IN VASCULAR DISEASE.

E. TO PROMOTE THE RESPONSIBLE DEVELOPMENT AND IMPLEMENTATION OF NEW TECHNOLOGY FOR DIAGNOSING AND TREATING VASCULAR DISEASE, BY PROMOTING RESEARCH AND EDUCATION AND BY INTERFACING WITH INDUSTRY AND REGULATORY AGENCIES.

CONTINUED AT THE END OF SCHEDULE O

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS

SYSTEM REFORM BILLS THAT ARE BEING CONSIDERED CURRENTLY.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

PUBLICATIONS AND WEB DEVELOPMENT

SCHEDULE O (Form 990)

Department of the Treasury Internal Revenue Service

# Supplemental Information to Form 990

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OMB No. 1545-0047

**2008**

Open to Public Inspection

Name of the organization: SOCIETY FOR VASCULAR SURGERY

Employer identification number: 22-2990719

FORM 990, PART VI, SECTION A, LINE 6: THERE ARE 7 CLASSES OF MEMBERSHIP: CANDIDATE- PHYSICIANS WHO ARE CURRENTLY ENROLLED OR ACCEPTED INTO AN ACCREDITED VASCULAR SURGERY RESIDENCY TRAINING PROGRAM. ACTIVE- PHYSICIANS WHO HAVE DEMONSTRATED AN ACTIVE INTEREST AND EXCELLENCE IN THE FIELD OF VASCULAR DISEASE. INTERNATIONAL- PHYSICIANS WHO RESIDE OUTSIDE NORTH AMERICA WHO OTHERWISE ARE QUALIFIED FOR ACTIVE MEMBERSHIP. ASSOCIATE- NON-SURGEON PHYSICIANS WHO HAVE A DEMONSTRATED ACTIVE INTEREST IN THE FIELD OF VASCULAR DISEASE. AFFILIATE- NON-PHYSICIANS WHO HAVE A DEMONSTRATED ACTIVE INTEREST IN THE FIELD OF VASCULAR DISEASE. SENIOR- SVS MEMBERS WHO HAVE RETIRED FROM THE PRACTICE OF VASCULAR SURGERY. HONORARY- DISTINGUISHED PHYSICIANS WHO HAVE ACHIEVED INTERNATIONAL PROMINENCE IN THE VASCULAR FIELD.

FORM 990, PART VI, SECTION A, LINE 7A: ACTIVE AND SENIOR MEMBERS VOTE TO ELECT MEMBERS OF THE GOVERNING BODY.

FORM 990, PART VI, SECTION A, LINE 7B: CANDIDATE MEMBERS SHALL HAVE SUCH RIGHTS AND OBLIGATIONS AS MAY BE APPROVED BY THE BOARD OF DIRECTORS OF THE SOCIETY, INCLUDING SERVING ON COMMITTEES AND VOTING ON ASSIGNED COMMITTEES, BUT SHALL NOT BE PERMITTED TO VOTE ON OTHER SOCIETY BUSINESS, HOLD ELECTED OFFICE OR SERVE AS CHAIR OF COUNCILS OR COMMITTEES. ACTIVE MEMBERS SHALL HAVE SUCH RIGHTS AND OBLIGATIONS AS MAY BE APPROVED BY THE BOARD OF DIRECTORS OF THE SOCIETY, INCLUDING VOTING AT THE ANNUAL BUSINESS MEETING, SERVING ON COMMITTEES OR COUNCILS, SERVING AS CHAIRS OF COMMITTEES OR COUNCILS, OR HOLDING ELECTED OFFICE. SENIOR MEMBERS SHALL HAVE SUCH RIGHTS

SCHEDULE O (Form 990)

Department of the Treasury Internal Revenue Service

# Supplemental Information to Form 990

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OMB No. 1545-0047

**2008**

Open to Public Inspection

Name of the organization: SOCIETY FOR VASCULAR SURGERY

Employer identification number: 22-2990719

AND OBLIGATIONS AS MAY BE APPROVED BY THE BOARD OF DIRECTORS OF THE SOCIETY, INCLUDING VOTING AT THE ANNUAL BUSINESS MEETING, SERVING ON COMMITTEES OR COUNCILS, SERVING AS CHAIRS OF COMMITTEES OR COUNCILS OR HOLDING THE ELECTED OFFICE OF VICE PRESIDENT, PRESIDENT-ELECT OR PRESIDENT. ASSOCIATES SHALL HAVE SUCH RIGHTS AND OBLIGATIONS AS MAY BE APPROVED BY THE BOARD OF DIRECTORS OF THE SOCIETY, INCLUDING SERVING ON COMMITTEES AND VOTING ON THOSE SPECIFIC COMMITTEES, BUT SHALL NOT BE PERMITTED TO VOTE ON OTHER SOCIETY BUSINESS, HOLD ELECTED OFFICE OR SERVE AS CHAIRS OF COUNCILS OR COMMITTEES. AFFILIATES SHALL HAVE SUCH RIGHTS AND OBLIGATIONS AS MAY BE APPROVED BY THE BOARD OF DIRECTORS OF THE SOCIETY, INCLUDING SERVING ON COMMITTEES AND VOTING ON THOSE SPECIFIC COMMITTEES, BUT SHALL NOT BE PERMITTED TO VOTE ON OTHER SOCIETY BUSINESS, HOLD ELECTED OFFICE OR SERVE AS CHAIRS OF COUNCILS OR COMMITTEES. HONORARY MEMBERS SHALL HAVE ALL PRIVILEGES OF ACTIVE MEMBERS EXCEPT THAT THEY CANNOT VOTE ON SOCIETY BUSINESS, HOLD ELECTED OFFICE OR SERVE AS MEMBERS OF THE COUNCILS OR THE BOARD OF DIRECTORS. HONORARY MEMBERS AUTOMATICALLY RECEIVE THE DESIGNATION OF DISTINGUISHED FELLOW. INTERNATIONAL MEMBERS SHALL HAVE SUCH RIGHTS AND OBLIGATIONS AS MAY BE APPROVED BY THE BOARD OF DIRECTORS OF THE SOCIETY, INCLUDING SERVING ON COMMITTEES AND VOTING ON THOSE SPECIFIC COMMITTEES, BUT SHALL NOT BE PERMITTED TO VOTE ON OTHER SOCIETY BUSINESS, HOLD ELECTED OFFICE OR SERVE AS CHAIRS OF COUNCILS OR COMMITTEES.

FORM 990, PART VI, SECTION A, LINE 10: THE 990 IS REVIEWED BY THE EXECUTIVE DIRECTOR AND THREE TOP OFFICERS THAT MAKE UP THE AUDIT COMMITTEE. THEY APPROVED THE 990 FOR SUBMISSION.

SCHEDULE O (Form 990)

Department of the Treasury Internal Revenue Service

# Supplemental Information to Form 990

▶ 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.

OMB No 1545-0047

**2008**

Open to Public Inspection

Name of the organization: SOCIETY FOR VASCULAR SURGERY

Employer identification number: 22-2990719

FORM 990, PART VI, SECTION B, LINE 12C: EACH YEAR, BOARD MEMBERS ARE REQUIRED TO COMPLETE A CONFLICT OF INTEREST DISCLOSURE FORM. THE BOARD RECORDS THIS EVENT IN THE MEETING MINUTES. FORMS ARE KEPT ON FILE IN THE HEADQUARTERS OFFICE.

FORM 990, PART VI, SECTION B, LINE 15: THE EXECUTIVE DIRECTOR'S COMPENSATION IS DETERMINED BY THE EXECUTIVE COMMITTEE OF SVS AS PART OF A PERFORMANCE EVALUATION. IN MID 2008, A SALARY STUDY WAS CONDUCTED BY RSM MCGLADRY, INC., WHICH WILL ALSO BE USED TO DETERMINE COMPENSATION.

FORM 990, PART VI, SECTION C, LINE 18: THE DOCUMENTS ARE AVAILABLE UPON REQUEST AND ON THE GUIDESTAR WEBSITE.

FORM 990, PART VI, SECTION C, LINE 19: MANY OF THE GOVERNING DOCUMENTS ARE AVAILABLE ON THE VASCULARWEB.ORG WEBSITE INCLUDING POLICIES AND PROCEDURES AND BY-LAWS. OTHER DOCUMENTS ARE AVAILABLE UPON REQUEST.

PART III, LINE 1

CONTINUATION OF ORGANIZATION'S MISSION

F. TO PROVIDE CONTINUING EDUCATION FOR VASCULAR SURGEONS IN NEW SCIENCE, SURGICAL TECHNIQUES AND PRACTICE, THROUGH AN ANNUAL SCIENTIFIC MEETING AND OTHER EDUCATIONAL MEDIA.

G. TO PROMOTE, ENCOURAGE AND IMPROVE THE DISSEMINATION OF KNOWLEDGE CONCERNING ALL ASPECTS OF VASCULAR DISEASE TO STUDENTS, INTERNS, RESIDENTS, FELLOWS, OTHER PHYSICIANS AND OTHER HEALTH CARE WORKERS.

H. TO DISSEMINATE INFORMATION TO PATIENTS AND THE PUBLIC ON ALL ASPECTS

SCHEDULE O
(Form 990)
Department of the Treasury
Internal Revenue Service

# Supplemental Information to Form 990

▶ 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

OMB No. 1545-0047
**2008**
Open to Public Inspection

Name of the organization: SOCIETY FOR VASCULAR SURGERY

Employer identification number: 22-2990719

OF VASCULAR DISEASE AND HEALTH.

I. TO DEVELOP POST GRADUATE TRAINING PATHWAYS IN VASCULAR SURGERY.

J. TO STANDARDIZE THE NOMENCLATURE AND REPORTING OF VASCULAR CONDITIONS, AND TO DEVELOP APPROPRIATE POSITION STATEMENTS AND PRACTICE GUIDELINES.

K. TO ADDRESS SOCIAL, ECONOMIC, ETHICAL AND LEGAL ISSUES THAT RELATE TO VASCULAR SURGERY.

L. TO FURTHER THE DEVELOPMENT OF VASCULAR SURGERY AS AN INDEPENDENT SPECIALTY.

SCHEDULE R (Form 990)
Department of the Treasury
Internal Revenue Service

# Related Organizations and Unrelated Partnerships

▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, lines 33, 34, 35, 36, or 37.
▶ See separate instructions.

OMB No. 1545-0047
2008
Open to Public Inspection

Name of the organization
SOCIETY FOR VASCULAR SURGERY

Employer identification number
22-2990719

**Part I** Identification of Disregarded Entities

| (A) Name, address, and EIN of disregarded entity | (B) Primary activity | (C) Legal domicile (state or foreign country) | (D) Total income | (E) End-of-year assets | (F) Direct controlling entity |
|---|---|---|---|---|---|
| | | | | | |
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| | | | | | |
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**Part II** Identification of Related Tax-Exempt Organizations

| (A) Name, address, and EIN of related organization | (B) Primary activity | (C) Legal domicile (state or foreign country) | (D) Exempt Code section | (E) Public charity status (if section 501(c)(3)) | (F) Direct controlling entity |
|---|---|---|---|---|---|
| AMERICAN VASCULAR ASSOCIATION FOUNDATION - 04-3580038, 633 N SAINT CLAIRE ST., CHICAGO, IL 60611 | TO SUPPORT CAREER DEVELOPMENT FOR VASCULAR SURGEON RESEARCHERS | ILLINOIS | 501(C)(3) | LINE 7 | SOCIETY FOR VASCULAR SURGERY |
| | | | | | |
| | | | | | |
| | | | | | |

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

Schedule R (Form 990) 2008

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**Part III** Identification of Related Organizations Taxable as a Partnership

| (A) Name, address, and EIN of related organization | (B) Primary activity | (C) Legal domicile (state or foreign country) | (D) Direct controlling entity | (E) Predominant income (related, investment, unrelated) | (F) Share of total income | (G) Share of end-of-year assets | (H) Disproportionate allocations? Yes | (H) No | (I) Code V UBI amount in box 20 of Schedule K-1 (Form 1065) | (J) General or managing partner? Yes | (J) No |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | |
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**Part IV** Identification of Related Organizations Taxable as a Corporation or Trust

| (A) Name, address, and EIN of related organization | (B) Primary activity | (C) Legal domicile (state or foreign country) | (D) Direct controlling entity | (E) Type of entity (C corp, S corp, or trust) | (F) Share of total income | (G) Share of end-of-year assets | (H) Percentage ownership |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
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**Part V. Transactions With Related Organizations**

| Note. Complete line 1 if any entity is listed in Parts II, III, or IV | | Yes | No |
|---|---|---|---|
| 1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV? | | | |
| a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity | 1a | | X |
| b Gift, grant, or capital contribution to other organization(s) | 1b | X | |
| c Gift, grant, or capital contribution from other organization(s) | 1c | | X |
| d Loans or loan guarantees to or for other organization(s) | 1d | | X |
| e Loans or loan guarantees by other organization(s) | 1e | | X |
| f Sale of assets to other organization(s) | 1f | | X |
| g Purchase of assets from other organization(s) | 1g | | X |
| h Exchange of assets | 1h | | X |
| i Lease of facilities, equipment, or other assets to other organization(s) | 1i | | X |
| j Lease of facilities, equipment, or other assets from other organization(s) | 1j | | X |
| k Performance of services or membership or fundraising solicitations for other organization(s) | 1k | | X |
| l Performance of services or membership or fundraising solicitations by other organization(s) | 1l | | X |
| m Sharing of facilities, equipment, mailing lists, or other assets | 1m | X | |
| n Sharing of paid employees | 1n | X | |
| o Reimbursement paid to other organization for expenses | 1o | | X |
| p Reimbursement paid by other organization for expenses | 1p | X | |
| q Other transfer of cash or property to other organization(s) | 1q | | X |
| r Other transfer of cash or property from other organization(s) | 1r | | X |

2 If the answer to any of the above is 'Yes,' see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

| | (A) Name of other organization(s) | (B) Transaction type (a-r) | (C) Amount involved |
|---|---|---|---|
| (1) | | | |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |



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**Part VI** Unrelated Organizations Taxable as a Partnership

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships

| (A) Name, address, and EIN of entity | (B) Primary activity | (C) Legal domicile (state or foreign country) | (D) Are all partners section 501(c)(3) organizations? Yes | (D) No | (E) Share of end-of year assets | (F) Disproportionate allocations? Yes | (F) No | (G) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | (H) General or managing partner? Yes | (H) No |
|---|---|---|---|---|---|---|---|---|---|---|
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