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Department of the Treasury Internal Revenue Service

832001 12-18-08

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 Open to Public Inspection

| A F                     | or the                      | 2008 calendar year, or tax year beginning AUG 1, 2008  | and ending            | UL 31, 2009                            |  |
|-------------------------|-----------------------------|--|-----------------------|--|--|
|                         | heck if                     |  |                       | D Employer identifi                    |  |
| _                       | Address<br>change           | s labelor Am Cradidy watt  | <b>51</b>             |  |  |
|                         | Name<br>change              |  |                       | 99-0                                   | 301434                                 |
|                         | initial<br>return           | Number and street (or P.O. box if mail is not delivered to street add  | ess) Room/suite       | E Telephone numbe                      | or                                     |
|                         | Termin-<br>ation            | Instruc- F.O. BOX 3170, DEFT 713   |                       | (808)                                  |  |
| <u> </u>                | Amende<br>return<br>Applica | City or town, state or country, and ZIP + 4  |                       | G Gross receipts \$                    | 8,880,080.                             |
| <u> </u>                | Application pending         |  |                       | H(a) is this a group r                 |  |
|                         |                             | F Name and address of principal officer:BANK OF HAWAII   |                       | for affiliates?                        | Yes X No                               |
|                         |                             | SAME AS C ABOVE empt status: X 501(c) (3 ) ◀ (insert no.) 4947(a)(1) or  | 1                     | H(b) Are all affiliates in             |  |
|                         |                             | empt status: LX 501(c) (3 ) ◀ (insert no.)   | 527                   | 7                                      | a list. (see instructions)             |
|                         |                             | organization. Corporation X Trust Association Other  | la Vasa               | H(c) Group exemption                   |  |
|                         |                             | Summary  | L Year                | or formation: 2003                     | M State of legal domicile: HI          |
|                         |                             | Briefly describe the organization's mission or most significant activities: T  | O PROVIDI             | E SUPPORT FO                           | OR THE                                 |
| Activities & Governance |                             | CHARITABLE AND EDUCATIONAL PURPOSES A  |                       |  |  |
| Ë                       |                             | Check this box  if the organization discontinued its operations or   |                       |  |  |
| Ş                       |                             | Number of voting members of the governing body (Part VI, line 1a)  |                       |  | 1                                      |
| Ğ                       |                             | Number of independent voting members of the governing body (Part VI, Iir   |                       |  | 1                                      |
| Se                      |                             | Total number of employees (Part V, line 2a)  |                       | í                                      |  |
| Š                       | 6                           | Total number of volunteers (estimate if necessary)   |                       |  | 0                                      |
| ₹                       |                             | Total gross unrelated business revenue from Part VIII, Jine 12, column (C)   |                       | 1_                                     | 0.                                     |
| _                       | b                           | Net unrelated business taxable income from Form 990-T, line 645-   |                       | 7t                                     | 0.                                     |
|                         |                             | Contribution and areas (Bet VIII line 41)  | IED I                 | Prior Year                             | Current Year                           |
| 9                       |                             | Contributions and grants (Part VIII, line 1h)  | //_                   |  | <u></u>                                |
| Revenue                 |                             | Program service revenue (Part VIII, line 2g)  Investment income (Part VIII, column (A), lines 3, 4, and 7d)  20  |                       |  | 1 201 610                              |
| Æ                       |                             | Investment income (Part VIII, column (A), lines 3, 4, and Zd) 20   | <i>.</i>              | 293,664                                | -1,034,619.                            |
|                         |                             | Other revenue (Part VIII, column (A), lines 5, 6d, 8c 9c, 100 and 11e)   |                       | 202 664                                | 1 024 610                              |
|                         |                             | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), lin  |                       | 293,664                                | -1,034,619.                            |
|                         |                             | Grants and similar amounts paid (Part IX, column (A), lines 1-3)   |                       | 921,051                                | 815,000.                               |
|                         | 1                           | Benefits paid to or for members (Part IX, column (A), line 4)  |                       | 78,725                                 | . 85,058.                              |
| Expenses                | 15                          | Salaries, other compensation, employee benefits (Part IX, column (A), lines  |                       | 10,125                                 | . 63,036.                              |
| <b>6</b>                | loa .                       | Professional fundraising fees (Part IX, column (A), line 11e)  |                       | ······································ | _                                      |
| 찗                       | 17                          | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)   | <del> </del>          | 2,350                                  | 3,939.                                 |
|                         |                             | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)  |                       | 1,002,126                              |  |
|                         |                             | Revenue less expenses. Subtract line 18 from line 12   | -                     | -708 <b>,</b> 462                      |  |
| 50                      | <u> </u>                    | Trevenies less experiess. Submast mis 10 monthine 12   |                       | Beginning of Year                      | End of Year                            |
| Sign                    | 20                          | Total assets (Part X, line 16)   | <u> </u>              | 18,712,154                             |  |
| <b>₩</b>                | 21                          | Total liabilities (Part X, line 26)  |                       |  |  |
| Net Assets or           | 22                          | Net assets or fund balances. Subtract line 21 from line 20   |                       | 18,712,154                             | . 16,773,538.                          |
|                         | art II                      | Signature Block  |                       |  |  |
|                         |                             | Under penalties of perjury, I declare that I have examined this return, including accompanying sci<br>and complete. Declaration of preparer (other than officer) is based on all information of which pre- | nedules and statement | s, and to the best of my knowl         | ledge and belief, it is true, correct, |
|                         |                             | ODa  | •                     |  |  |
| Sig                     | 3n                          | At the state of  |                       | 010                                    | 0 7 2009                               |
| He                      | re                          | Styrature of officer   |                       | Date                                   |  |
|                         |                             | Type or print name and title   |                       | <del> </del>                           |  |
| _                       |                             |  | Date (                | Check if Pre                           | parer's identifying number             |
| Pai                     | ld                          | Preparer's signature   | 19                    | self- (see                             | instructions)                          |
| Pre                     | parer's                     | Firm's name (or  |                       | EIN >                                  |  |
| Usi                     | B Only                      | yours if self-employed),   |                       | EIN P                                  |  |
|                         |                             | address, and ZIP + 4   |                       | Phone no.                              |  |
| Ma                      | v the l                     | IRS discuss this return with the preparer shown above? (see instructions)  |                       | 11 110110 110.                         | Yes No                                 |

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

832002

4d Other program services. (Describe in Schedule O.)

Total program service expenses > \$

including grants of \$

835,579.

) (Revenue \$

(Must equal Part IX, Line 25, column (B).)

| _   | CN WODEHOUSE FACULTI BENEFIT TRUST  | 4 2 4 | _            | _  |
|-----|---|-------|--------------|--|
|     | 990 (2008) . AT SEABURY HALL 99-0301  | 434   | P            | age 3  |
| Par | t 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)?                                 | - 1   |              | 1  |
|     | If "Yes," complete Schedule A   | 1     | <u> </u>     | <del>                                     </del> |
| 2   | Is the organization required to complete Schedule B, Schedule of Contributors?  | _2_   |              | <u>X</u> _                                       |
| 3   | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for     | ľ     |              | ١  |
|     | 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_    |              | X  |
| 5   | Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and            |       |              |  |
|     | reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III  | 5     |              | ——   |
| 6   | Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice                 |       |              | ١  |
|     | on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I                       | -6    |              | <u>X</u>   |
| 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_    | <b> </b>     | <u>X</u>   |
| 8   | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete        |       | 1            | \  |
|     | Schedule D, Part III  | 8_    | <b>├</b> —   | <u>X</u>   |
| 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         |       | 1            |  |
|     | credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV             | 9     | <b>.</b>     | <u> X</u>  |
| 10  | Did the organization hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V                     | 10    | <b>├</b>     | 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    | ļ            | <u>  X</u>                                       |
| 12  | Did the organization receive an audited financial statement for the year for which it is completing this return that was            |       |              | 1  |
|     | prepared in accordance with GAAP? If "Yes," complete Schedule D, Parts XI, XII, and XIII  | 12    | ļ            | <u> </u>   |
| 13  | Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E                                | 13    | ↓            | <u> </u>   |
| 14a | Did the organization maintain an office, employees, or agents outside of the U.S.?  | 14a   | ļ            | <u> </u>   |
| þ   | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,             | İ     | 1            | 1  |
|     | and program service activities outside the U.S.? If "Yes," complete Schedule F, Part I  | 14b   | <b>├</b>     | <u> </u>   |
| 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 | 1     | 1            | ١  |
|     | located outside the United States? If "Yes," complete Schedule F, Part II   | 15    | ∔            | <u> </u>   |
| 16  | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals      |       |              | 1  |
|     | located outside the United States? If "Yes," complete Schedule F, Part III  | 16    | <del> </del> | 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    | <del> </del> | X  |
| 20  | Did the organization operate one or more hospitals? If "Yes," complete Schedule H   | 20    | <del> </del> | <u> </u>   |
| 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    | <u> </u>     |  |
| 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    | <del> </del> | <u> X</u>  |
| 23  | Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? If "Yes," complete Schedule J                       | 23    | ↓_           | <u> </u>   |
| 24a | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the             |       | 1            | 1  |
|     | last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b-24d and complete Schedule K           | .     | 1            |  |
|     | If "No", go to question 25  | 248   | Ц_           | <u> </u>   |
| b   | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?                                   | 24t   | <u> </u>     |  |
| C   |   | 1     | 1            | 1  |
|     | any tax-exempt bonds?   | 240   | Ц_           |  |
| đ   | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?                             | 240   | <u>-  </u>   | <del></del> _                                    |
| 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  | 25    |              | <u> </u>   |
| 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   | 251   | <u> </u>     | X  |
| 26  | Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified      |       |              |  |
|     | person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II                             | 26    |              | X  |
| 27  | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial             | 1     | -            | 1  |

contributor, or to a person related to such an individual? If "Yes," complete Schedule L, Part III

## 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 X person(s) listed in Part VII, Section A)? If "Yes." complete Schedule L. Part IV 28a b Have a family member who had a direct or indirect business relationship with the organization? X 28b c Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional X 28c X Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M ............ 29 29 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation X 30 31 Did the organization liquidate, terminate, or dissolve and cease operations? X 31 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete X Schedule N, Part II 32 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 X 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 .... . .......... X 34 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 ... ... ... ... ... X 35 . .... .... .. .. .. .. .. ... Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? X 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 X and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI 37

Form 990 (2008) AT SEABURY HALL

Part V Statements Regarding Other IRS Filings and Tax Compliance

| 15 Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter 4- of not applicable 1.5 Enter 4- of more applicable 1.5 Enter 4- of mor    |            |   |          | Yes          | No           |
|---|------------|---|----------|--------------|--------------|
| U.S. Information Returns. Enter -0- if not applicable  Did the organization compty with backup withholding rules for reportable payments to vendors and reportable gaming N/A (gambling) winnings to prize winners?  Enter the number of employees reported on Form W3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.  B If all least one is reported on line 22, did the organization file all required federal employment tax returns?  Note: if the sum of lines 1s and 2s is greater than 250, you may be required to e-file this return. (see instructions)  B If all least one is reported on line 2s, did the organization file all one or effects the return. (see instructions)  As A tarry time during the celendar 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)?  As A tarry time during the celendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country; level.  See the Instructions for exceptions and filing requirements for Form TD F 90-22-1, Report of Foreign Bank and Financial Accounts.  B If "Yes," it is used to a party to a prohibited tax shelter transaction?  B If Yes, it is the organization a party to a prohibited tax shelter transaction?  B If Yes, it is the organization include with every excitation an express statement that such contributions or gifts were not tax deductible?  B If Yes, it is the organization include with every excitation are suppress statement that such contributions or gifts were not tax deductible?  B If Yes, it is the organization include with every excitation are suppress statement that such contributions or gifts were not tax deductible?  B If Yes, it is the organization include with every excitation are suppress that party is a party to a prohibited tax excitation for the party is a party to a prohib     | 1a         | Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of  |          | 103          | 140          |
| b Enter the number of Forms W2G included in ine 1a. Enter 0-if not applicable   |            |   |          |              |              |
| b Lit the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to pitze winners?  2 Einter 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  5 If all least one is reported on line 2a, clid the organization file line (least) required federal employment tax returns?  Note. If the sum of lines 1 a and 2a is greater than 250, you may be required reployment tax returns?  Note. If the sum of lines 1 a and 2a is greater than 250, you may be required to e-file this return. (see instructions)  3 Lid the organization have unreleated clusiness gross income of \$1,000 or more during the year overed by this return?  4 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)?  5 Lif Yes, inter the name of the foreign country; levels see the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.  5 Limitation approach of the organization aparty to a prohibited tax shelter transaction at any time during the tax year?  5 Life Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5 Life Was the comparization aparty to a prohibited tax shelter transaction?  6 Life the organization solicit any contributions that it was or as a party to a prohibited tax shelter transaction?  6 Life the organization include with every solicitation an appress attainment that such contributions or gifts were not tax deductible?  6 Life the organization include with every solicitation an appress attainment that such contributions or gifts were not tax deductible?  7 Life the organization prowde goods or services in exchange for any quild pro que contribution of more than \$757   | b          |   |          |              | į            |
| Gambling) winnings to prize winners?  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  Note. If the sum of lines 1 and 2 as ig rester than 250, you may be required to e-file this return, (see instructions)  3b Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this raturn?  5b If Yea, Fash filed a Form 990-Tro this year of If Ywo, Provide an explanation in Schedule O  4c 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)?  5c Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5c Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5c Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5d Did any taxable party notify the organization file Form 88861, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  6d Did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  7 Organizations that may receive deductible contributions under section 170(e).  8d Did the organization self, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8827?  7 If Yes, 'indicate the number of Forms 8282 filed during the year  6 Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7 Ph Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7 Did the organization make a distribution to a donor, donor advised funds.  8 Section 501(c)(3) and ot    |            | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming          |          |              |              |
| filed for the calendar year ending with or within the year covered by this return.  b if at least one is reported on line 2a, cid the organization file all required federal employment tax returns?  Note. If the sum of lines 1 and 2a is greater than 250, you may be required to e-file this return. (see instructions)  3a bit the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?  b if Yes, 1 has 1 filed a form 990-ff to this year? If Yiv. () provide an explanation in Schedule 0  3b  1if Yes, 3 enter the name of the foreign country; leach as a bank account, securities account, or other financial account; or securities account, or other financial account; and filing requirements for Form TD F90-22.1, 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?  5b If Yes, 1 to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  6c Did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  6c Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757  7a Dranization provide goods or services in exchange for any quid pro quo contribution of more than \$757  7b If Yes, 1 indicate the number of Forms 8282 filed during the year  b If Yes, 1 indicate the number of Forms 8282 filed during the year  c Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7c X  7d Define the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7a For all contributions of clars, boats, airplanes, and other vehicles, did the organization file form 8898 as required?  8 Section 501(e)(3) and other sponsoring organization, or a fund maintaining donor |            | N/AI  | 1c       |              |              |
| b if at least one is reported on line 2a, did the organization file all required federal employment tax returns?  Note: if the sum of lines 1 a and 2 a 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?  b if 'Yes,' has if filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O  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; level as a bank account, accurities account, or other financial account)?  4a X  b if 'Yes,' enter the name of the foreign country; level as a bank account, accurities account, or other financial account)?  4a X  b if 'Yes,' enter the name of the foreign country; level as a bank account, accurities account, or other financial account)?  5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5b Did any taxable party notify the organization that it was or a a party to a prohibited tax shelter transaction?  6b Did the organization solicit any contributions that were not tax deductible?  6c Did the organization solicit any contributions that were not tax deductible?  6c Did the organization solicit any contributions that were not tax deductible?  6c Did the organizations that may receive deductible contributions under section 170(c).  6c Did the organization solicit any contributions under section 170(c).  6c Did the organization solicit any contributions under section 170(c).  6c Did the organization solicit any contributions under section 170(c).  6c Did the organization solicit provides dispose of tangible personal property for which it was required to file Form 8282?  7c X  7d If 'Yes,' indicate the number of Forms 8282 filed during the year required to file Form 8298 as required?  7th For contributions of qualified intellectual property, did the organiza   | <b>2</b> a | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,                                 |          |              |              |
| Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return, (see instructiona)  Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?  ### 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)?  ### It *Yes,* enter the name of the foreign country (such as a bank account, securities account, or other financial account)?  ### See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.  ### It *Yes,* enter the name of the foreign country (such as a bank account, securities account, or other financial account)?  ### See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.  ### It *Yes,* the question is a party to a prohibited tax shelter transaction?  ### It *Yes,* to question 5 aor 5b, did the organization file Form 8585-T, Desclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  ### It *Yes,* to question 5 aor 5b, did the organization file Form 8585-T, Desclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  ### It *Yes,* did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  ### Organizations that may receive deductible contributions under section 170(c).  ### It *Yes,* did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757.  ### It *Yes,* did the organization provide goods or services in the goods or services provided?  ### It *Yes,* did the organization notify the donor of the value of the goods or services provided?  ### It *Yes,* did the organization of provided the did the good of the goods or services provided?  ###    |            | filed for the calendar year ending with or within the year covered by this return   |          |              | l            |
| 3a Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?  b if 'Yes,' has it filed a Form 990-T for this year' if 'No,' provide an explanation in Schedule O  3b 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)?  5b If 'Yes,' enter the name of the foreign country; ▶  5ce 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?  5c Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5c Was the organization a party to a prohibited tax shelter transaction?  5d If 'Yes,' to question 5a or 5b, did the organization file Form 8896-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  6c If 'Yes,' did the organization include with ever not tax deductible?  6d If 'Yes,' did the organization include with ever y solicitation an express statement that such contributions or gifts were not tax deductible?  6d If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  6d Did the organization provide goods or services in exchange for any quid pro que contribution of more than \$75?  7e X  5d If 'Yes,' did the organization notify the donor of the value of the goods or services provided?  7d Did the organization ordiny the donor of the value of the goods or services provided?  7d Did the organization understand the subposition of tangible personal property for which it was required to file Form 8292?  7d If 'Yes,' indicate the number of Forms 8282 filed during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contr   | b          | If at least one is reported on line 2a, did the organization file all required federal employment tax returns?              | 2b       |              | <u> </u>     |
| b if "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O 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 level as a bank account, ascurities account, or other financial account)?  4b 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 aparty to a prohibited tax shelter transaction at any time during the tax year?  5b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  6c If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  6c If "Yes," did the organization provide productions that were not tax deductible?  7c Organizations solicit any contributions that were not tax deductible?  8c If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  9c Organizations that may receive deductible contributions under section 170(c).  1a Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757  7c If Yes," did the organization notify the donor of the value of the goods or services provided?  9c If Yes, "Indicate the number of Forms 8292 filed during the year  1b If "Yes," indicate the number of Forms 8292 filed during the year  2b If the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  9c If Yes, "Indicate the number of Forms 8292 filed during the year  1b Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  1c If Yes, and the organization make a distribution of the property of the orga   |            | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)      |          |              |              |
| 4a 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)?  5b 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 Was the organization a party to a prohibited tax shelter transaction?  5b X C If Yes, 't oquestion 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  6a Did the organization solicit any contributions that were not tax deductible?  6b If Yes, 'did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  6c If Yes, 'did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  6c If Yes, 'did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757 7e X  6d If Yes, 'did the organization notify the donor of the value of the goods or services provided?  7b If 'Yes, 'indicate the number of Forms 8282 filed during the year  | За         | Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?        | 3a       |              | X            |
| financial account in a foreign country (such as a bank account, securities account, or other financial account)?  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.  58 Was the organization a party to a prohibted tax shelter transaction at any time during the tax year?  58 Was the organization aparty to a prohibted tax shelter transaction?  59 Was the organization 5a or 5b, did the organization file Form 8866-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  60 Did the organization solicit any contributions that were not tax deductible?  61 Was, "did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  62 Was the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  63 Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757  64 If "Yes," did the organization notify the donor of the value of the goods or services provided?  75 Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  76 If "Yes," indicate the number of Forms 8282 filed during the year  77 Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  78 Por all contributions of qualified intellectual property, did the organization file Form 8899 as required?  79 Por all contributions of qualified intellectual property, did the organization file Form 8899 as required?  79 Por all contributions of qualified intellectual property, did the organization file Form 8899 as required?  79 Por all contributions of qualified intellectual property, did the organization file Form 8899 as required?  79 Por all contributions of qualified intellectual property,    | þ          | If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O                            | 3b       |              |              |
| 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.  Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5a  | 4a         | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a   |          |              |              |
| See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.  58 Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  59 Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  50 If 'Yes,' to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  60 Did the organization solicit any contributions that were not tax deductible?  61 If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  70 Organizations that may receive deductible contributions under section 170(c).  81 If 'Yes,' did the organization notify the donor of the value of the goods or services in exchange for any quid pro quo contribution of more than \$757   |            | financial account in a foreign country (such as a bank account, securities account, or other financial account)?            | 4a       | <u> </u>     | X            |
| Financial Accounts.  Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  b Dd any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  b If 'Yes,' to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  b If 'Yes,' did the organization solicit any contributions that were not tax deductible?  b If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  c Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757  c Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$757  c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d If 'Yes,' indicate the number of Forms 8282 filed during the year  benefit contract?  f Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, dire  | b          | If "Yes," enter the name of the foreign country:  |          |              |              |
| Sa Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  5a X  5b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  5b X  5c If Yes, 1 to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?  6a Did the organization solicit any contributions that were not tax deductible?  6b If Yes, did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  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 X  6b If Yes, did the organization notify the donor of the value of the goods or services provided?  7b If Yes, indicate the number of Forms 8282 filed during the year  6b If Yes, indicate the number of Forms 8282 filed during the year  7c X  7d If Yes, indicate the number of Forms 8282 filed during the year  8b Did the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  7 Th Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  7 Th For contributions of qualified intellectual property, did the organization file a Form 1098-C as required?  7n For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  7n For Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organizations maintaining donor advised funds and section 509(a)(3) supporting organization make any taxable distributions under section 4966?  9a Did the organization make any taxable distributions under section 4966?  9b Did the organization make any taxable distributions under secti   |            | See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and               |          | Ī            |              |
| b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  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?  6 Did the organization solicit any contributions that were not tax deductible?  6 B X  b if 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  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?  7 a X  b if 'Yes,' did the organization notify the donor of the value of the goods or services provided?  7 b If 'Yes,' indicate the number of Forms 8282 filed during the year  b Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d if 'Yes,' indicate the number of Forms 8282 filed during the year  b Did the organization, during the year, peay premilums, directly or indirectly, to pay premilums on a personal benefit contract?  7 a Did the organization, during the year, pay premilums, directly or indirectly, on a personal benefit contract?  7 a Did the organization, during the year, pay premilums, directly or indirectly, on a personal benefit contract?  7 b For all contributions of cars, boats, airplanes, and other vehicles, did the organization file a form 1098-C as required?  7 b For contributions of cars, boats, airplanes, and other vehicles, did the organization file a form 1098-C as required?  7 b For contributions of cars, boats, airplanes, and other vehicles, did the organization file a form 1098-C as required?  7 b For contributions of cars, boats, airplanes, and other vehicles, did the organization file and section 509(a)(3) supporting organizations. Did the organization make any taxable distributions under section 4966?  9 b Did the organiz   |            | Financial Accounts.   | ,,       | <b>,</b> ,   | 1            |
| 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?  6a Did the organization solicit any contributions that were not tax deductible?  6b if "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  7 Organizations that may receive deductible contributions under section 170(c).  8b did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?  7e  | 5a         | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?                       | 5a       | <u> </u>     |              |
| Tax Shelter Transaction?  6a Did the organization solicit any contributions that were not tax deductible?  6b If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  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?  7 a X  If 'Yes,' did the organization notify the donor of the value of the goods or services provided?  7 b If 'Yes,' did the organization notify the donor of the value of the goods or services provided?  7 b If 'Yes,' did the organization notify the donor of the value of the goods or services provided?  8 b If 'Yes,' did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  9 b Id the organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  10 b Id the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  11 b Id the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  12 b For all contributions of qualified Intellectual property, did the organization file Form 8899 as required?  13 b For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  14 b For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  15 c Section 501(c)(3) and other sponsoring organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?  15 b Did the organization make any time during the year?  16 b Id the organization make any time during the year?  17 b Section 501(c)(7) organizations. Enter: N/A  18 a Initiation fees and capital contributions included on Part VIII, line 12  19 b Id the orga   | þ          | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?            | 5b       | <u> </u>     | X            |
| 6a Did the organization solicit any contributions that were not tax deductible? 6b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 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? 7e X  b If "Yes," did the organization notify the donor of the value of the goods or services provided? 7 Did the organization sells, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? 7c X  d If "Yes," indicate the number of Forms 8282 filed during the year e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 7e Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f X X  g For all contributions of qualified intellectual property, did the organization file a Form 1098-C as required? 7h  S 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?  Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds. a Did the organization make any taxable distributions under section 49667.  9a  Did the organization make a distributions of organization file a form 1098-C as required? 7h  a initiation fees and capital contributions included on Part VIII, line 12  b Gross income from members or shareholders  b Gross income from other sources (Do not net amounts due or pa   | C          | If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited |          |              | 1            |
| b if 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  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   |            | Tax Shelter Transaction?  | 5c       | <u> </u>     | <del> </del> |
| were not tax deductible?  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?  b If Yes,' did the organization notify the donor of the value of the goods or services provided?  c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d If Yes,' indicate the number of Forms 8282 filed during the year  e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  f Did the organization of qualified intellectual property, did the organization file Form 8899 as required?  7 Th  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?  Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.  a Did the organization make any taxable distributions under section 4966?  b Did the organization make any taxable distributions under section 4966?  b Did the organization make any taxable distributions under section 4966?  b Gross income from the sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  11 Section 501(c)(12) organizations. Enter: N/A  a Gross income from members or shareholders  a Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)   |            | •   | 6a       | <u> </u>     | <u>  X</u>   |
| 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? b if 'Yes,' did the organization notify the donor of the value of the goods or services provided? c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? d if 'Yes,' indicate the number of Forms 8282 filed during the year e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? f Did the organization of qualified intellectual property, did the organization file Form 8899 as required? f Por all contributions of qualified intellectual property, did the organization file a Form 1098-C as required? f Por all contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required? f Por all contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required? f Por all contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required? f Por all contributions of qualified intellectual property, did the organization file a Form 1098-C as required? f Por all contributions of qualified intellectual property, did the organization file a Form 1098-C as required? f Por all contributions of qualified intellectual property, did the organization file a Form 1098-C as required? f Por all contributions of qualified intellectual property, did the organization file a Form 1098-C as required? f Por all contributions organizations maintaining donor advised funds and section 509(e)(3) supporting organization and any time during the year? g Por a   | þ          | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts        |          |              | ]            |
| a Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?  7a   |            |   | 6b       | ļ            | <del> </del> |
| b If "Yes," did the organization notify the donor of the value of the goods or services provided?  c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d If "Yes," indicate the number of Forms 8282 filed during the year  e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  f For all contributions of qualified Intellectual property, did the organization file Form 8899 as required?  f For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  7a  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?  9 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.  a Did the organization make any texable distributions under section 4966?  9a  Did the organization make a distribution to a donor, donor advisor, or related person?  9b  10 Section 501(c)(7) organizations. Enter: N/A  a Initiation fees and capital contributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  11 Section 501(c)(12) organizations. Enter: N/A  a Gross income from members or shareholders  a Gross income from members or shareholders  a Gross income from ther sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a  Section 504(c)(12) organizations. Enter: N/A  a Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)   | 7          | , , ,   |          | 1            |              |
| c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  d If 'Yes,' indicate the number of Forms 8282 filed during the year  e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  7e  | a          |   |          | —            | X            |
| to file Form 8282?  d If "Yes," indicate the number of Forms 8282 filed during the year e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  f Did the organization of qualified intellectual property, did the organization file Form 8899 as required?  f For all contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  f Posection 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?  Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.  Did the organization make any taxable distributions under section 4966?  Did the organization make a distribution to a donor, donor advisor, or related person?  Section 501(c)(7) organizations. Enter: N/A  Initiation fees and capital contributions included on Part VIII, line 12  Gross receipts, included on Form 990, Part VIII, line 12  Gross income from members or shareholders  Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  | _          |   | 7b       | <b>├</b>     | <del> </del> |
| d If "Yes," indicate the number of Forms 8282 filed during the year   | С          |   | ۱ _      | 1            | J            |
| e Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  f Did the organization of qualified intellectual property, did the organization file a Form 1098-C as required?  f For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  f Por contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  f Por contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  f Por contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  f Por contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property, did the organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property, did the organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property, did the organization file a Form 1098-C as required?  f Por contributions and other sources and section 509(a)(3)  supporting organizations. Did the supporting organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property organization file a Form 1098-C as required?  f Por contributions of qualified intellectual property organization file a Form 1098-C as requir    |            |   | /c       | <del> </del> | +^-          |
| benefit contract?  f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  g For all contributions of qualified intellectual property, did the organization file Form 8899 as required?  h For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  7 h  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 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.  9 Did the organization make any taxable distributions under section 4966?  9 b Did the organization make a distribution to a donor, donor advisor, or related person?  9 b Did the organization make a distributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  10 Gross income from members or shareholders  b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?   |            |   | 1        |              | 1            |
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| g For all contributions of qualified intellectual property, did the organization file Form 8899 as required?  h For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?  7h 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 Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.  Did the organization make any taxable distributions under section 4966?  b Did the organization make a distribution to a donor, donor advisor, or related person?  9b Section 501(c)(7) organizations. Enter: N/A  a Initiation fees and capital contributions included on Part VIII, line 12  b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  10b Gross income from members or shareholders  b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?   |            |   |          | ╁            |              |
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| Section 501(c)(7) organizations. Enter: N/A  a Initiation fees and capital contributions included on Part VIII, line 12   | b          |   |          |              | $\top$       |
| 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   | 10         |   |          |              | T            |
| b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  10b  Section 501(c)(12) organizations. Enter: N/A  a Gross income from members or shareholders  b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?   |            |   |          |              |              |
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| a Gross income from members or shareholders b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  | 11         | · · · · · · · · · · · · · · · · · · ·   | 7        |              |              |
| b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  | æ          | 1 1   | _        | 1            | 1            |
| amounts due or received from them.)  12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?   | ŧ          |   | 7        | 1            |              |
| 12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  |            | · · · · · · · · · · · · · · · · · · ·   | _        | 1            | 1            |
| b If "Yes," enter the amount of tax-exempt interest received or accrued during the year N/A   12b   | 128        |   | 12       | a            | <u> </u>     |
|   | t          | If "Yes," enter the amount of tax-exempt interest received or accrued during the year N/A   12b                             |          | 1            |              |

Page 6

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

| Sec            | tion 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.   | 1        |              |  |
| 1a             | Enter the number of voting members of the governing body 1a 1  | 1        |              |  |
| b              | Enter the number of voting members that are independent  |          | +            |  |
| 2              | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other   | 1        |              |  |
|                | officer, director, trustee, or key employee?   | 2        |              | <u>X</u>   |
| 3              | Did the organization delegate control over management duties customarily performed by or under the direct supervision  | İ        |              |  |
|                | of officers, directors or trustees, or key employees to a management company or other person?  | 3        |              | <u>X</u>   |
| 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  | 1        |              |  |
|                | governing body?  | 7a       |              | X  |
| _              | Are any decisions of the governing body subject to approval by members, stockholders, or other persons?  | 7b       |              | Х  |
| 8              | Did the organization contemporaneously document the meetings held or written actions undertaken during the year  |          |              |  |
|                | by the following:  |          |              | ĺ  |
| a              | The governing body?  | 8a       | X            | <u> </u>   |
| D              | Each committee with authority to act on behalf of the governing body? N/A  | 8b       | ⊢ -          | 72   |
| 9a             | Does the organization have local chapters, branches, or affiliates?  | 9a       |              | X  |
| D              | If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates,  |          |              | 1  |
| 40             | and branches to ensure their operations are consistent with those of the organization?   | 9Ь       |              | <del></del>                                      |
| 10             | Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must   |          | v            | 1  |
| 11             | describe in Schedule O the process, if any, the organization uses to review the Form 990   | 10       | X            | <del></del>                                      |
| ••             | Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the   |          |              | x  |
| Sec            | organization's mailing address? If "Yes," provide the names and addresses in Schedule O  | _11      | i            |  |
| <u> </u>       | TOTAL TORONG   |          | Yes          | No   |
| 12a            | Does the organization have a written conflict of interest policy? If "No," go to line 13   | 12a      | X            | 140  |
| _              | Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise  | 120      |              | <del> </del>                                     |
| _              | to conflicts?  | 12b      |              | X  |
| c              | Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe  | 120      | <del> </del> | <del></del>                                      |
|                | in Schedule O how this is done   | 12c      | Х            | ł  |
| 13             | Does the organization have a written whistleblower policy?   | 13       | X            | <u> </u>   |
| 14             | Does the organization have a written document retention and destruction policy?  | 14       | X            | <del>                                     </del> |
| 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? N/A-see explanation on Sch   | 15a      | [            |  |
| ь              | 37/3 ===11   | 15b      | <u> </u>     |  |
|                | Describe the process in Schedule O. (see instructions)   |          | Π            | T  |
| 16a            | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a  |          | 1            | 1  |
|                | taxable entity during the year?  | 16a      |              | X  |
| ь              | If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation  |          |              | 1  |
|                | in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's  |          | 1            | <b>‡</b>   |
|                | exempt status with respect to such arrangements?   | 16b      | l            |  |
| Sec            | tion 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 X Upon request   |          |              |  |
| 19             | Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, a  | nd fin   | ancial       |  |
|                | 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 of the person who possesses the books and records of the organization.  | ation: I | <b>-</b> _   |  |
|                | BANK OF HAWAII - (808) 694-4525  |          |              |  |
| 00000          | 130 MERCHANT ST, HONOLULU, HI 96813  |          |              |  |
| 83200<br>12-18 | DO COMPANY OF THE COM | Fort     | 990          | (2008)   |

## Form 990 (2008) Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated **Employees, and Independent Contractors**

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

- 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.

| (A)<br>Name and Title     | (B) Average hours | (c)                            |                       | (C<br>Posi         | tion     | appl                         | W            | (D) Reportable compensation                    | <b>(E)</b> Reportable compensation               | (F) Estimated amount of  |
|---------------------------|-------------------|--------------------------------|-----------------------|--------------------|----------|------------------------------|--------------|--|--|--|
|                           | per<br>week       | Individual trustee or director | Institutional trustee | Officer            |          | Highest compensated employee |              | from<br>the<br>organization<br>(W-2/1099-MISC) | from related<br>organizations<br>(W-2/1099-MISC) | other compensation from the organization and related organizations |
| BANK OF HAWAII<br>TRUSTEE | 1.00              |                                | x                     |                    |          |                              | _            | 85,058.  | 0.   | 0  |
|                           |                   | 1                              | -                     |                    |          |                              | _            |  |  |  |
|                           |                   | +                              | -                     |                    | -        |                              |              |  |  |  |
|                           |                   | ╁                              | -                     | -                  | -        | -                            |              |  |  |  |
|                           |                   |                                | -                     | _                  | _        | <u> </u>                     | ļ            |  |  | <u> </u>   |
|                           |                   | <u> </u>                       | L                     | <u> </u>           | _        |                              |              |  |  |  |
|                           |                   |                                | L                     |                    |          |                              |              |  |  |  |
|                           |                   |                                |                       |                    |          |                              |              |  |  |  |
|                           |                   | $\top$                         |                       |                    |          |                              |              |  |  |  |
| <del></del>               |                   | $\dagger$                      | $\vdash$              | -                  |          | <u> </u>                     | -            |  |  |  |
|                           |                   | +                              | ╀                     | ╁                  | -        | ╁                            | $\vdash$     |  |  | <del>                                     </del>                   |
|                           |                   | +                              | ╄-                    | ╁                  | _        | +                            | -            |  |  |  |
|                           |                   | _                              | <u> </u>              | <u> </u>           |          |                              | <u> </u>     |  |  | <u> </u>   |
|                           |                   |                                |                       |                    |          |                              |              |  |  |  |
|                           |                   |                                |                       |                    |          |                              |              |  |  |  |
| <del></del>               |                   | †                              | +                     | +-                 | -        | T                            | <del> </del> |  |  | <u> </u>   |
| <del></del>               |                   | $\dagger$                      | +                     | +                  | +        | +                            | +            |  |  |  |
|                           |                   | +                              | +                     | +                  | $\vdash$ | +                            | $\vdash$     |  | <u> </u>   | <del> </del>   |
| <del></del>               |                   | $\downarrow$                   | +                     | $oldsymbol{\perp}$ | -        | 1                            | _            |  |  | <del> </del>   |
|                           |                   |                                |                       |                    |          | 1                            |              |  | }  |  |

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Form 990 (2008)

CN WODEHOUSE FACULTY BENEFIT TRUST 99-0301434 AT SEABURY HALL Page 8 Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) **(F)** (A) **(B)** (C) (D) Œ) **Position Estimated** Name and title Reportable Reportable Average (check all that apply) amount of compensation hours compensation from from related other per individual trustee or director week the organizations compensation organization (W-2/1099-MISC) from the (W-2/1099-MISC) organization and related organizations 85,058. 0 0. Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization Yes No 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 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization X Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person **Section B. Independent Contractors** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. (A) **(B)** (C) Name and business address Description of services Compensation

Form **990** (2008)

Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation

from the organization

|  |                              |  | ABURY HA                   | LL            |                      |  | 99-03014                                | 34 Page 9   |
|--|------------------------------|--|----------------------------|---------------|----------------------|--|---|---|
| Pari   | VII                          | Statement of Rever   | iue                        | *             | (A)<br>Total revenue | (B) Related or exempt function revenue | (C)<br>Unrelated<br>business<br>revenue | (D) Revenue excluded from tax under sections 512, 513, or 514 |
| Contributions, gifts, grants and other similar amounts | 1 a<br>b<br>c<br>d<br>e<br>f | Fundraising events Related organizations Government grants (contribut All other contributions, gifts, gran                                   | 1b 1c 1d ions) 1e ts, and  |               |                      |  |   | <i>"</i>  |
| Contrib<br>and oth                                     | _                            | similar amounts not included abo<br>Noncesh contributions included in lines<br>Total, Add lines 1a-1f  |                            |               |                      | ,                                      | ,                                       | ,   |
| Program Service<br>Revenue                             | 2 a<br>b<br>c                |  |                            | Business Code |                      |  |   |   |
| g<br>6   | e<br>f                       | All other program service reverses. Add lines 2a-2f  |                            |               |                      |  |   |   |
|  | 3<br>4<br>5                  | Investment income (including other similar amounts) Income from investment of ta Royalties   | x-exempt bond p            | b             | 474,944.             | 474,944.                               |   |   |
|  | 6 a                          | Rental income or (loss)  | (i) Real                   | (ii) Personal | ,                    |  |   | ,   |
|  | 7 a                          | Gross amount from sales of<br>assets other than inventory<br>Less: cost or other basis<br>and sales expenses                                 | (i) Securities<br>8405136. | (ii) Other    | ,                    |  | · · · · · · · · · · · · · · · · · · ·   |   |
| 90   | c                            | Gross income from fundraising  | ng events (not             |               | -1509563             | -1509563.                              |   | · ·   |
| Other Revenue  |                              | including \$ contributions reported on line Part IV, line 18   | e 1c). See<br>a            | •             |                      | .,,                                    |   |   |
|  | 9 8                          | Net income or (loss) from fundamental Gross income from gaming a Part IV, line 19  | activities. See            |               |                      |  |   |   |
|  | 10 8                         | <ul> <li>Net income or (loss) from gaing</li> <li>Gross sales of inventory, less and allowances</li> <li>Less: cost of goods sold</li> </ul> | s returns                  |               |                      |  |   |   |
|  | 11 :                         | Net income or (loss) from sal<br>Miscellaneous Reven   | ue                         | Business Code |                      |  |   |   |
|  | •                            | d All other revenue  |                            |               |                      |  |   |   |
| 83200<br>02-02   | 12<br>9                      | Total Revenue. Add lines 1h, 2g, 3   |                            |               | -1034619             | 1034619.                               | 0                                       | 0 .<br>Form <b>990</b> (2008                                  |

# Part X Statement of Functional Expenses

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

| Smale and other assistance to payarments and   |  | expenses   | Management and general expenses  | Fundraising<br>expenses  |
|--|--|--|--|--|
| Grants and other assistance to governments and   |  |  |  |  |
| organizations in the U.S. See Part IV, line 21   | 815,000.   | 815,000.   |  |  |
| Grants and other assistance to individuals in  |  |  |  |  |
| he U.S. See Part IV, line 22   |  |  |  |  |
| Grants and other assistance to governments,  |  |  |  |  |
| • '  |  |  | :  |  |
|  |  |  |  |  |
| Benefits paid to or for members  |  |  |  |  |
| Compensation of current officers, directors,   |  |  |  |  |
| trustees, and key employees  | 85,058.  | 17,605.  | 67,453.  |  |
| Compensation not included above, to disqualified   |  |  |  |  |
|  |  |  |  |  |
| persons described in section 4958(c)(3)(B)   |  |  |  |  |
| · · · · · · · · · · · · · · · · · · ·  |  |  |  |  |
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| The state of the s | 3,664.   | 2,974.   | 690.   |  |
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| _ · · · · · · · · · · · · · · · · · · ·  |  |  |  |  |
| Conferences, conventions, and meetings   |  |  |  |  |
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|  |  |  |  |  |
| F  |  |  |  |  |
| above. (Expenses grouped together and labeled  |  |  | , ,  | 3  |
| expenses shown on line 25 below.)  |  |  |  |  |
|  | 209.   |  | 209.   |  |
|  | 47.  |  | 47.  |  |
| INTEREST PAID ON FYE 7/  | 19.  |  | 19.  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| All other expenses   |  |  |  |  |
|  | 903,997.   | 835,579  | 68,418.  | (  |
| ·  | <del>-</del>   |  |  |  |
| •  |  |  |  |  |
| ·  |  | 1  | {  |  |
| 1  |  |  |  |  |
|  | Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16.  Benefits paid to or for members  Compensation of current officers, directors, trustees, and key employees  Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)  Other salaries and wages  Pension plan contributions (include section 401(k) and section 403(b) employer contributions)  Other employee benefits  Payroll taxes  Fees for services (non-employees):  Management  Legal  Accounting  Lobbying  Professional fundraising services. See Part IV, line 17 Investment management fees  Other  Advertising and promotion  Office expenses  Information technology  Royalties  Occupancy  Travel  Payments of travel or entertainment expenses for any federal, state, or local public officials  Conferences, conventions, and meetings interest  Payments to affiliates  Depreciation, depletion, and amortization insurance  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.)  FOREIGN TAX WITHHELD  FYE 7/31/03 FEDERAL EXC  INTEREST PAID ON FYE 7/ | Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16 | Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16 Benefits paid to or for members Compensation of current officers, directors, trustees, and key employees 85,058. 17,605. Compensation not included above, to disqualified persons (as defined under section 4958(I/1)) and persons described in section 4958(I/1) and persons plan contributions (include section 401(k) and section 403(b) employer contributions)  Other employee benefits Payroll taxes Fees for services (non-employees):  Management Legal Accounting Accoun | Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 18 Benefits paid to or for members Compensation of current officers, directors, trustees, and key employees (according to the part of the paid to or for members (according to the paid to or for members (according to the paid to organize the paid to organize the paid to persons (as defined under section 4958(f)(1)) and persons described in section 4958(f)(1)) and persons described in section 4958(f)(3)(8) (b) (b) employe contributions (include section 401(k) and section 403(b) employe contributions) (b) there employee benefits Payroll taxes Peers for services (non-employees):  Management Legal (b) employee section 401(k) and section 403(h) employee section 401(k) and section 403(h) employee contributions) (b) employee benefits Payroll taxes (b) employee section 403(h) employee contributions) (b) employee contributions (include section 403(h) employee (include 403(h) employee (include 403(h) employee (include 403(h) employee (include 403(h) employee (include 403(h) employee (include 403 |

|                             | 990 (2 |  |  | <u>99-0</u> | 3014     | 34            | Page        | 11              |
|-----------------------------|--------|--|--|-------------|----------|---------------|-------------|-----------------|
| Par                         | 1 X    | Balance Sheet  | (A)                                    |             |          | (B)           |             |                 |
|                             |        |  | Beginning of year                      |             | En       | d of yea      |             |                 |
|                             | 1      | Cash · non-interest-bearing  | E02 420                                | 1           |          | 066           |             | 5.              |
| }                           | 2      | Savings and temporary cash investments   | 502,430.                               | 2           |          | 866,          | 304         | <u>.</u>        |
|                             | 3      | Pledges and grants receivable, net   |  | 3           |          |               |             |                 |
|                             | 4      | Accounts receivable, net   |  | 4           |          |               |             |                 |
|                             | 5      | Receivables from current and former officers, directors, trustees, key                   |  |             |          |               |             |                 |
|                             | _      | employees, or other related parties. Complete Part II of Schedule L                      | ······································ | 5           |          |               |             |                 |
|                             | 6      | Receivables from other disqualified persons (as defined under section                    | * *                                    |             |          |               |             |                 |
|                             |        | 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete                     |  |             |          |               |             |                 |
|                             | _      | Part II of Schedule L  |  | 6           |          |               |             |                 |
| Assets                      | 7      | Notes and loans receivable, net  | <del></del>                            | 7           |          |               |             |                 |
| SS                          | 8      | Inventories for sale or use  |  | 8           |          |               |             |                 |
|                             | 9      | Prepaid expenses and deferred charges  | ······································ | 9           |          | •••••         |             |                 |
|                             | 10a    | Land, buildings, and equipment: cost basis 10a   |  |             |          |               |             |                 |
|                             | Ь      | Less: accumulated depreciation. Complete   |  | 1           |          |               |             |                 |
|                             |        | Part VI of Schedule D 10b  |  | 10c         |          |               |             |                 |
|                             | 11     | Investments - publicly traded securities   | 18,209,724.                            | 11          | 15,      | 907           | <u>, 13</u> | <u>l.</u>       |
|                             | 12     | Investments - other securities. See Part IV, line 11                                     |  | 12          |          |               |             |                 |
|                             | 13     | Investments - program-related. See Part IV, line 11                                      |  | 13          |          |               |             |                 |
|                             | 14     | Intangible assets  |  | 14          |          |               |             |                 |
|                             | 15     | Other assets. See Part IV, line 11   |  | 15          |          |               |             |                 |
|                             | 16     | Total assets. Add lines 1 through 15 (must equal line 34)                                | 18,712,154.                            | 16          | 16,      | 773           | <u>,53</u>  | <u>8.</u>       |
|                             | 17     | Accounts payable and accrued expenses  | <del></del>                            | 17          |          |               |             |                 |
|                             | 18     | Grants payable   |  | 18          |          |               |             |                 |
|                             | 19     | Deferred revenue   |  | 19          |          |               |             |                 |
|                             | 20     | Tax-exempt bond liabilities  |  | 20          |          |               |             |                 |
| 8                           | 21     | Escrow account liability. Complete Part IV of Schedule D                                 |  | 21          |          |               |             |                 |
| Liabilities                 | 22     | Payables to current and former officers, directors, trustees, key employees,             |  |             |          |               |             |                 |
| iab                         |        | highest compensated employees, and disqualified persons. Complete Part II                |  |             |          |               |             |                 |
|                             |        | of Schedule L  |  | 22          |          |               |             |                 |
|                             | 23     | Secured mortgages and notes payable to unrelated third parties                           |  | 23          |          |               |             |                 |
|                             | 24     | Unsecured notes and loans payable  |  | 24          |          |               |             |                 |
|                             | 25     | Other liabilities. Complete Part X of Schedule D   |  | 25          |          |               |             |                 |
|                             | 26     | Total liabilities. Add lines 17 through 25   | 0                                      | - 26        |          |               |             | 0.              |
|                             |        | Organizations that follow SFAS 117, check here  and complete                             | ` ;                                    |             |          | ,             |             |                 |
| 88                          | 1      | lines 27 through 29, and lines 33 and 34.  | , ì                                    |             |          |               |             |                 |
| Ē                           | 27     | Unrestricted net assets  |  | 27          | ł        |               |             |                 |
| Sale                        | 28     | Temporarily restricted net assets  |  | 28          |          |               |             |                 |
| Ā                           | 29     | Permanently restricted net assets  |  | 29          |          |               |             |                 |
| Net Assets or Fund Balances |        | Organizations that do not follow SFAS 117, check here                                    |  |             |          |               |             |                 |
| ō                           | 1      | complete lines 30 through 34.  |  |             | }        |               |             |                 |
| ats                         | 30     | Capital stock or trust principal, or current funds                                       | 18,712,154                             | . 30        | 16       | ,773          | 3,53        | 38              |
| SS                          | 31     | Paid-in or capital surplus, or land, building, or equipment fund                         | 0                                      |             |          |               |             | 0               |
| at A                        | 32     | Retained earnings, endowment, accumulated income, or other funds                         | 0                                      | - 32        |          |               |             | 0               |
| ž                           | 33     | Total net assets or fund balances  | 18,712,154                             |             | 16       | ,773          | 3,5         | <del>38</del> . |
|                             | 34     | Total liabilities and net assets/fund balances   | 18,712,154                             |             |          | ,773          |             |                 |
| Pa                          | rt XI  | Financial Statements and Reporting   | · · · · · · · · · · · · · · · · · · ·  | <u> </u>    |          |               |             | _               |
|                             |        |  |  |             |          |               | Yes         | No              |
| 1                           | Acc    | cunting method used to prepare the Form 990: 🔀 Cash 🔲 Accrual 🗀                          | Other                                  |             |          |               | 1           |                 |
| 2a                          |        | e the organization's financial statements compiled or reviewed by an independent         |  |             |          | 2a            | ĺ           | X               |
|                             |        | e the organization's financial statements audited by an independent accountant?          |  |             |          | 2b            | 1           | X               |
|                             |        | es' to lines 2a or 2b, does the organization have a committee that assumes respo         |  |             |          |               | <u> </u>    |                 |
| •                           |        | ew, or compilation of its financial statements and selection of an independent according |  |             |          | 2c            |             |                 |
| 3а                          |        | result of a federal award, was the organization required to undergo an audit or au       |  |             |          | <del></del> - |             |                 |
|                             |        | and OMB Circular A-133?  |  |             |          | 3a            |             | X               |
| _ b                         | lf 'Y  | es," did the organization undergo the required audit or audits?                          |  |             |          | 3b            |             |                 |
|                             |        |  | · · · · · · · · · · · · · · · · · · ·  | <u> </u>    | <u> </u> |               |             |                 |

Form **990** (2008)

# SCHEDULE A (Form 990 or 990-EZ)

Department of the Treasury

**Public Charity Status and Public Support** 

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

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

2008 Open to Public

815,000.

Schedule A (Form 990 or 990-EZ) 2008

OMB No 1545-0047

Internal Revenue Service

Name of the organization

CN WODEHOUSE FACULTY BENEFIT TRUST

AT SEABURY HALL

Employer identification number 99-0301434

| Part I      | Reason           | or Public Charit            | y Status (All organiza                  | ations mus    | t complete   | this part.) | (see instr        | uctions)           |                              |              |          |            |
|-------------|------------------|-----------------------------|---|---------------|--------------|-------------|-------------------|--------------------|------------------------------|--------------|----------|------------|
| The organ   | ization is not a | private foundation b        | ecause it is: (Please che               | ck only on    | e organiza   | tion.)      |                   |                    |                              |              |          |            |
| 1 🔲         | A church, cor    | nvention of churches,       | or association of churc                 | hes descri    | bed in sec   | tion 170(I  | o)(1)(A)(i).      |                    |                              |              |          |            |
| 2 🗀         | A school des     | cribed in section 170       | (b)(1)(A)(ii). (Attach Sch              | nedule E.)    |              |             |                   |                    |                              |              |          |            |
| з 🗀         | A hospital or    | a cooperative hospite       | al service organization d               | lescribed in  | section 1    | 70(b)(1)(   | V(iii). (Atta     | ch Sched           | lule H.)                     |              |          |            |
| 4           | =                |                             | perated in conjunction v                |               |              |             |                   |                    | -                            | hospital's   | s name   | <b>)</b> , |
|             | city, and state  |                             | •                                       |               |              |             |                   | -74-74-74-7        |                              |              |          |            |
| 5           | •                |                             | enefit of a college or un               | iversity ow   | med or ope   | erated by   | a governm         | ental unit         | described                    | l in         |          |            |
|             | _                | (b)(1)(A)(iv). (Complet     |   |               | о. ор.       |             | - g - · · · · · · |                    |                              |              |          |            |
| 6 🗀         |                  |                             | nt or governmental unit                 | described     | in section   | 170/5/41    | (A)6A             |                    |                              |              |          |            |
| 7 🗔         |                  | _                           | ives a substantial part (               |               |              |             |                   | from the           | acnomi a                     | ıblic decer  | ibad ır  |            |
| •           |                  | b)(1)(A)(vi). (Complet      |   | or its suppt  | or nom a g   | JOVEITINE   | itai uiiit Oi     | HOIH HIS           | general po                   | JUIIC Gesci  |          | •          |
| • 🗀         | •                |                             | ection 170(b)(1)(A)(vi). (              | Complete      | Dort II \    |             |                   |                    |                              |              |          |            |
|             |                  |                             |   | · · · · · ·   |              |             |                   |                    |                              | d            | ainta f  |            |
| <b>a</b> (  | -                |                             | ives: (1) more than 33 1                |               |              |             | •                 | •                  |                              | -            | -        |            |
|             |                  |                             | ctions · subject to certa               | •             |              | •           |                   |                    |                              | -            |          |            |
|             |                  |                             | xable income (less sect                 | ion 511 tax   | k) trom bus  | inesses a   | cquirea by        | tne orgai          | nization at                  | ter June 3   | U, 197   | э.         |
| 40 [        |                  | <b>509(a)(2).</b> (Complete | •                                       |               |              |             | <b>500/</b> 1//   |                    | 4!                           |              |          |            |
| 10 L        |                  |                             | erated exclusively to te                |               | =            |             |                   |                    |                              |              |          |            |
| 11 <u>X</u> |                  |                             | erated exclusively for th               |               | •            |             |                   | -                  | -                            | -            |          | or         |
|             |                  |                             | tions described in secti                |               | -            |             | ). See <b>sec</b> | tion 509(a         | a)(3). Chec                  | ck the box   | tnat     |            |
|             | _                |                             | organization and comple                 |               |              |             |                   |                    | . T <del>©</del> T           |              |          |            |
|             | a L Type         |                             |   | Тур           |              | -           | _                 |                    |                              | Type III - C |          |            |
| e           | -                |                             | the organization is not                 |               | -            | -           | -                 |                    |                              |              |          | n          |
|             |                  |                             | nan one or more publicly                |               | _            |             |                   |                    | 9(a)(1) or s                 | ection 509   | (a)(2).  |            |
| f           |                  |                             | en determination from t                 |               |              |             |                   | ) III              |                              |              |          |            |
|             |                  |                             | is box                                  |               |              |             |                   |                    |                              |              |          | ш          |
| 8           |                  |                             | rganization accepted ar                 |               |              | -           |                   |                    |                              |              |          |            |
|             |                  |                             | rectly controls, either al              | -             | ether with   | persons d   | lescribed i       | n (ii) and (i      | iii) below,                  |              | Yes      | No         |
|             |                  |                             | pported organization?                   |               |              |             |                   |                    |                              |              | <u> </u> | X          |
|             | (ii) A family    | member of a person          | described in (i) above?                 | '             |              | · ·         |                   |                    |                              | 11g(ii)      |          | X          |
|             | (iii) A35%       | controlled entity of a      | person described in (i)                 | or (ii) above | e?           |             |                   |                    |                              | 11g(iii)     | <u> </u> | <u>X</u>   |
| h           | Provide the f    | following information       | about the organizations                 | the organ     | ization sup  | ports.      |                   |                    |                              |              |          |            |
|             |                  |                             |   |               |              |             |                   |                    |                              |              |          |            |
| (I) Name    | e of supported   | (II) EIN                    | (iii) Type of                           | (iv) is the c | rganization  | (v) Did you | notify the        | (vi) is            |                              | (vii) Ar     | nount c  | of         |
| • •         | anization        | , , ,                       | organization<br>(described on lines 1-9 |               | sted in your |             | ion in col.       | organization       | on in coi.  <br>sed in the i |              | port     |            |
|             |                  | [                           | above or IRC section                    |               | document?    |             | r support?        | (I) organiz<br>U.S | 5.?                          |              |          |            |
|             |                  |                             | (see instructions))                     | Yes           | No           | Yes         | No                | Yes                | No                           |              |          |            |
|             |                  |                             |   | Ì             |              |             | Ì                 | 1                  | 1 1                          |              |          |            |
| SEABU       | JRY HALI         | 99-0110784                  | 2                                       | X             |              | X           |                   | X                  | <u> </u>                     | 81           | <u> </u> | 00.        |
|             |                  |                             |   |               |              |             |                   |                    |                              |              |          |            |
|             |                  |                             |   | 1             |              |             |                   |                    |                              |              |          |            |
|             |                  |                             |   |               |              |             |                   |                    |                              |              |          |            |
|             |                  |                             |   |               |              | <u> </u>    | <u> </u>          | <u></u>            |                              |              |          |            |
|             |                  |                             |   |               |              |             |                   |                    |                              |              |          |            |
|             |                  |                             |   | ]             |              | j           | Ì                 | 1                  | _                            |              |          |            |
|             |                  |                             |   |               |              |             |                   |                    |                              |              |          |            |
|             |                  |                             |   | }             | 1            | }           | }                 | 1                  | } }                          |              |          |            |
|             |                  |                             |   | 1             | 1            | <u> </u>    | 1:                | 1                  |                              |              |          |            |

**Total** 

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

| ₽a   | rt   | Organizations     | Described in          | Sections 170        | (b)(1)(A)(iv) and   | d 170(b)(1)(A)(v                                 | i)           |
|------|--|-------------------|-----------------------|---------------------|---------------------|--|--------------|
|      | (Complete only if you checked                                      | the box on line 5 | , 7, or 8 of Part i.) | 1                   |                     |  |              |
| Sec  | tion A. Public Support   |                   |                       |                     |                     |  |              |
| Cale | ndar year (or fiscal year beginning in)                            | (a) 2004          | <b>(b)</b> 2005       | (c) 2006            | (d) 2007            | (e) 2008   | (f) Total    |
| 1    | Gifts, grants, contributions, and                                  |                   |                       |                     |                     |  |              |
|      | membership fees received. (Do not                                  |                   |                       |                     |                     |  |              |
|      | include any "unusual grants.")                                     |                   |                       | <u> </u>            | <u></u>             |  |              |
| 2    | Tax revenues levied for the organ-                                 |                   |                       |                     |                     | }  |              |
|      | ization's benefit and either paid to                               |                   |                       |                     |                     | ]  |              |
|      | or expended on its behalf  |                   |                       |                     | ļ                   |  |              |
| 3    | The value of services or facilities                                |                   |                       |                     | į                   |  |              |
|      | furnished by a governmental unit to                                |                   |                       | }                   |                     |  |              |
|      | the organization without charge                                    |                   |                       | <u> </u>            |                     |  | <del></del>  |
| 4    | Total. Add lines 1 · 3   |                   |                       | <u></u>             | <del></del>         |  | <del></del>  |
| 5    | The portion of total contributions                                 | :                 |                       |                     | 1                   | ,  |              |
|      | by each person (other than a                                       |                   |                       |                     |                     |  |              |
|      | governmental unit or publicly                                      |                   |                       |                     | ,                   |  |              |
|      | supported organization) included                                   |                   | ž.                    |                     | 1                   |  |              |
|      | on line 1 that exceeds 2% of the                                   |                   | ` /                   | 1                   |                     | ·  |              |
|      | amount shown on line 11,   |                   | 3                     |                     |                     | ,  |              |
| _    | column (f)   |                   |                       | <u> </u>            |                     |  |              |
|      | Public Support. Subtract line 5 from line 4                        |                   | <u> </u>              | 1                   | <u> </u>            | <u> </u>   |              |
|      | ction B. Total Support   |                   | 1                     | <del></del>         | <del></del>         | 1  |              |
|      | endar year (or fiscal year beginning in)                           | (a) 2004          | <b>(b)</b> 2005       | (c) 2006            | (d) 2007            | (e) 2008   | (f) Total    |
| _    | Amounts from line 4  | <u> </u>          | <del></del>           | <del> </del>        |                     | <del> </del>                                     | <del></del>  |
| 8    | Gross income from interest,  |                   |                       |                     |                     |  | ]            |
|      | dividends, payments received on                                    |                   |                       |                     |                     |  |              |
|      | securities loans, rents, royalties                                 |                   | ļ                     | 1                   |                     |  | 1            |
| _    | and income from similar sources                                    |                   | <del> </del>          | <del> </del>        | <del></del>         |  |              |
| 9    | Net income from unrelated business                                 |                   |                       |                     |                     |  | İ            |
|      | activities, whether or not the                                     |                   | }                     |                     |                     |  |              |
| 40   | business is regularly carried on                                   | <del></del>       | <del> </del>          | <del> </del>        | <del></del>         | <del>                                     </del> | <del> </del> |
| 10   | Other income. Do not include gain or loss from the sale of capital | Ì                 |                       | Ì                   | }                   |  |              |
|      | assets (Explain in Part IV.)                                       |                   |                       |                     | 1                   |  |              |
| 11   | Total support. Add lines 7 through 10                              |                   |                       |                     | -                   |  | <del> </del> |
| 12   |  | etc (see instruct | ione)                 |                     | <u>Ł</u>            | 12   | <del></del>  |
| 13   | First five years. If the Form 990 is fo                            |                   | -                     | ird fourth or fifth | tov veer se a secti |  | <del></del>  |
|      | organization, check this box and sto                               |                   |                       |                     | =                   |  |              |
| Se   | ction C. Computation of Pub  | lic Support Pe    | ercentage             |                     |                     | ·· <u>····</u>                                   |              |
| 14   | *  |                   | <del></del>           | . column (fi)       |                     | 14   | %            |
| 15   | Public support percentage from 200                                 |                   |                       |                     |                     |  |              |
| 16   | a 33 1/3% support test - 2008. If the                              |                   |                       |                     |                     |  |              |
|      | stop here. The organization qualifies                              |                   |                       |                     |                     |  |              |
| ı    | b 33 1/3% support test - 2007. If the                              |                   |                       |                     |                     |  |              |
|      | and stop here. The organization qua                                |                   |                       |                     |                     |  |              |
| 17   | a 10% -facts-and-circumstances te                                  |                   | · · ·                 |                     |                     |  | 6 or more,   |
|      | and if the organization meets the "fa                              |                   |                       |                     |                     |  |              |
|      | meets the 'facts-and-circumstances                                 |                   |                       |                     |                     |  |              |
| 1    | b 10% -facts-and-circumstances te                                  | _                 | *                     |                     | -                   |  |              |
|      | more, and if the organization meets                                |                   |                       |                     |                     |  |              |
|      | organization meets the "facts-and-ci-                              |                   |                       |                     | -                   |  | ▶□           |
| 18   | Private foundation. If the organizati                              |                   | -                     | •                   |                     | -  | ns . 🕨 🔲     |

Schedule A (Form 990 or 990-EZ) 2008

| Schedule A (Form 990 or 990-EZ) 2008  Part III   Support Schedule for  | Organizations       | Described in S        | Section 509(a)       | (2) (Complete only | if you checked the box | Page 3 (on line 9 of Part I.) |
|--|---------------------|-----------------------|----------------------|--------------------|------------------------|-------------------------------|
| Section A. Public Support  |                     |                       |                      |                    |                        |                               |
| Calendar year (or fiscal year beginning in)  | (a) 2004            | <b>(b)</b> 2005       | (c) 2006             | (d) 2007           | (e) 2008               | (f) Total                     |
| 1 Gifts, grants, contributions, and  |                     |                       |                      |                    |                        |                               |
| membership fees received. (Do not  |                     |                       |                      |                    |                        |                               |
| include any "unusual grants.")   |                     |                       |                      |                    |                        |                               |
| 2 Gross receipts from admissions,<br>merchandise sold or services per-<br>formed, or facilities furnished in<br>any activity that is related to the<br>organization's tax-exempt purpose |                     |                       |                      |                    |                        |                               |
| 3 Gross receipts from activities that  |                     |                       | :                    |                    |                        |                               |
| are not an unrelated trade or bus-<br>iness under section 513  |                     |                       |                      |                    | 1                      |                               |
| 4 Tax revenues levied for the organ-   |                     |                       |                      |                    |                        |                               |
| ization's benefit and either paid to   |                     |                       |                      |                    | ]                      |                               |
| or expended on its behalf  |                     |                       |                      |                    |                        |                               |
| 5 The value of services or facilities  |                     |                       |                      |                    |                        |                               |
| furnished by a governmental unit to  | <b>&gt;</b>         |                       |                      |                    |                        |                               |
| the organization without charge  | .                   |                       |                      |                    |                        |                               |
| 6 Total. Add lines 1 · 5   | ·                   |                       |                      |                    | <u> </u>               |                               |
| 7a Amounts included on lines 1, 2, an  |                     |                       |                      |                    |                        |                               |
| 3 received from disqualified persor  | s                   |                       |                      |                    |                        |                               |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9 10c, 11, and 12 for the year or \$5,000          |                     |                       |                      |                    |                        |                               |
| 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) 2004            | <b>(b)</b> 2005       | (c) 2006             | (d) 2007           | (e) 2008               | (f) Total                     |
| 9 Amounts from line 6  | \                   | <u> </u>              |                      | <u> </u>           | <u> </u>               |                               |
| 10a Gross income from interest,<br>dividends, payments received on<br>securities loans, rents, royalties<br>and income from similar sources  |                     |                       |                      |                    |                        |                               |
| <b>b</b> Unrelated business taxable income   |                     |                       | 1                    | 1                  |                        |                               |
| (less section 511 taxes) from business   | es                  |                       | İ                    |                    |                        |                               |
| acquired after June 30, 1975   |                     | <u> </u>              | <u> </u>             | ļ                  | · <del>-</del>         |                               |
| c Add lines 10a and 10b 11 Net income from unrelated busines   | :                   |                       |                      |                    |                        |                               |
| activities not included in line 10b,<br>whether or not the business is<br>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  |                     | 's first, second, thi | rd, fourth, or fifth | tax year as a sect | ion 501(c)(3) organı   | zation,                       |
| check this box and stop here   | <u> </u>            |                       | <u></u>              | <u> </u>           |                        | <u></u>                       |
| Section C. Computation of Pu   |                     |                       |                      |                    |                        |                               |
| 15 Public support percentage for 200   |                     |                       |                      |                    | 15                     | 9                             |
| 16 Public support percentage from 20   |                     |                       |                      | <u></u>            | 16                     | 9                             |
| Section D. Computation of In   |                     |                       |                      |                    |                        |                               |
| 17 Investment income percentage for  |                     |                       |                      |                    |                        | 9                             |
| 18 Investment income percentage fro  |                     |                       |                      |                    | 18                     | 9                             |
| 19a 33 1/3% support tests - 2008. if   | ne organization did | not check the box     | on line 14, and lir  | ne 15 is more thar | 133 1/3%, and line     | 1 / IS not                    |

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

Schedule A (Form 990 or 990-EZ) 2008

| SCHEDULE   |  |                       |  |  |   |   |   | OMB No 1545-0047                           | .           |
|--|--|-----------------------|--|--|---|---|---|--|-------------|
| (Form 990)   |  |                       | Grants and   | irants and Other Assistance to Organizations, Governments, and Individuals in the U.S. | e to Organizations<br>tuals in the U.S. | æ   |   | 2008                                       |             |
| Department of the Tressury<br>Internal Revenue Service |  | <b>■</b> Comp         | Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22. ▶ Attach to Form 990. | on answered "Yes," on F  | ," on Form 990, P.<br>m 990.            | irt IV, lines 21 or 22.                               |   | Open to Public Inspection                  | *           |
| Name of the organization                               | ion CN WODEHOUSE FA  | USE FACULTY<br>Y HALL | TY BENEFIT   | TRUST  |   |   |   | Employer identification number 99-0301434. | m           |
| Part   General In                                      | General Information on Grants and Assistance   | nd Assistance         |  |  |   |   |   |  |             |
| 1 Does the organiz                                     | Does the organization maintain records to substantiate the amount of   | o substantiate the    | e amount of the grants   | s or assistance, the   | grantees' eligibility                   | for the grants or ass                                 | the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection | ;  |             |
| criteria used to a                                     | criteria used to award the grants or assistance?   | tance?                |  | :  |   |   | :   | Yes  | 0           |
| Part H Grants an                                       | note in Part IV the organization's procedures for monitoring the use or grant funds in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any | Cedures for moni      | toring the use of grant<br>d Organizations in the  | Tunds in the United States. C  | o states.                               | nization answered "Y                                  | es" on Form 990. Part   | IV. line 21, for any                       | 1           |
| reciplent th   | 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              | 5,000. Check this     | s box if no one recipler   | nt received more th  | an \$5,000. Use Pa                      | rt IV and Schedule I-1                                | (Form 990) if addition  | lal space is needed                        | $\vdash$    |
| 1 (a) Name and ac                                      | 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<br>or assistance      | 1           |
| SEABURY HALL   |  |                       |  |  |   |   |   |  |             |
| 480 OLINDA ROAD  |  | 99-0110784            | 1<br>170(B)(1)(A)(II)  | 815,000  | 0                                       |   |   | PACULTY SUPPORT                            | 1           |
|  |  |                       |  |  |   |   |   |  | 1           |
|  |  |                       |  |  |   |   |   |  |             |
|  |  |                       |  |  |   |   |   |  |             |
|  |  |                       |  |  |   |   |   |  | 1           |
|  |  |                       |  |  |   |   |   |  | 1           |
| 2 Enter total numbs                                    | Enter total number of section 501(c)(3) and government organizations   | d government or       | ganizations  |  |   | :   | :   | 1  | • •         |
| 3 Enter total number LHA For Privacy Act               | Enter total number of other organizations For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990  | tion Act Notice,      | see the Instructions   | for Form 990.  |   |   |   | Schedule I (Form 990) 2008                 | <u>و</u> ۱۰ |

CN WODEHOUSE FACULTY BENEFIT TRUST AT SEABURY HALL

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. Schedule I (Form 990) 2008

Part # Grants and Oth

Page 2

99-0301434

| (a) Type of grant or assistance   | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-<br>cash assistance | (e) Method of valuation<br>(book, FMV, appraisal, other) | (f) Description of non-cash assistance |
|---|--------------------------|--------------------------|---------------------------------------|--|--|
|   |                          |                          |                                       |  | •                                      |
|   |                          |                          |                                       |  |  |
|   |                          |                          |                                       |  |  |
|   |                          |                          |                                       |  |  |
|   |                          |                          |                                       |  |  |
| Part 18   Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information. | de the information       | required in Part I,      | line 2, and any other                 | additional information.                                  |  |
| SCHEDULE I, PART I, LINE 2: GRANTS  | ARE MADE                 | E SOLELY T               | TO SEABURY HALL AS                    | IALL AS THE  |  |
| LE BENEFICIARY IDENTIFIED   | IN THE T                 | TRUST DOCUMENT.          | THE                                   | SCHOOL   |  |
| RIODIC REPOR  |                          | S WERE USE               | GRANTS WERE USED FOR FACULTY          | TY SALARIES  |  |
| THE OR TO MEET THE MAJOR  |                          | EXTRAORDINARY NEEDS OF   | EEDS OF THE                           | SCHOOL OR  |  |
| EDITCATIONAL DROGRAMS   |                          |                          |                                       |  |  |
| 113 EDUCALIONAL TROCKERS.   |                          |                          |                                       |  |  |
|   |                          |                          |                                       |  |  |
|   |                          |                          |                                       |  |  |

Schedule I (Form 990) 2008

## 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. 2008 Open to Public Inspection

Name of the organization

CN WODEHOUSE FACULTY BENEFIT TRUST AT SEABURY HALL

Employer identification number 99-0301434

FORM 990, PART VI, SECTION A, LINE 10: FORM 990 IS PREPARED BY THE TAX

DEPARTMENT OF BANK OF HAWAII AS CORPORATE TRUSTEE. BEFORE IT IS FILED, THE

TAX RETURN IS REVIEWED BY AN ADMINISTRATIVE OFFICER OF THE CORPORATE

TRUSTEE.

FORM 990, PART VI, SECTION B, LINE 12C: BANK OF HAWAII, THE CORPORATE

TRUSTEE, HAS A CONFLICT OF INTEREST POLICY THAT APPLIES TO ALL EMPLOYEES,

INCLUDING THE TAX OFFICERS, TAX CONSULTANTS AND ADMINISTRATIVE OFFICERS.

BANK OF HAWAII REQUIRES ALL EMPLOYEES TO PARTICIPATE IN REGULARLY SCHEDULED

TRAINING RELATED TO COMPLIANCE WITH CONFLICT OF INTEREST AND OTHER RELATED

POLICIES.

FORM 990, PART VI, SECTION B, LINE 15: THE TRUST DOES NOT HAVE A CEO,
OFFICERS OR EMPLOYEES. UNDER THE TERMS OF THE TRUST DOCUMENT, BANK OF
HAWAII AS TRUSTEE IS ENTITLED TO REASONABLE COMPENSATION FOR ITS SERVICES.
BANK OF HAWAII'S PUBLISHED FEE SCHEDULE FOR CHARITABLE TRUSTS APPLIES TO
THIS TRUST. IN ESTABLISHING THE TRUSTEE'S FEE SCHEDULE, CONSIDERATION WAS
GIVEN TO THE DUTIES, LIABILITIES AND EXPERTISE OF THE CORPORATE TRUSTEE, AS
WELL AS TO COMPARABLE FEES FOR SIMILAR SERVICES PROVIDED BY SIMILAR
ORGANIZATIONS. THE PROCESS OF ESTABLISING AN APPROPRIATE FEE AS
"REASONABLE" WAS ALSO PRESENTED TO THE HAWAII ATTORNEY GENERAL, WHOSE
OFFICE IS RESPONSIBLE FOR OVERSIGHT OF HAWAII'S CHARITABLE TRUSTS.

FORM 990, PART VI, SECTION C, LINE 19: THE TRUST DOCUMENT AND ACCOUNT

STATMENTS ARE PROVIDED TO THE BENEFICIARY ORGANIZATION IDENTIFIED IN THE

TRUST DOCUMENT (SEABURY HALL). BANK OF HAWAII, CORPORATE TRUSTEE, HAS A

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

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# SCHEDULE O (Form 990)

**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.

2008
Open to Public Inspection

Department of the Treasury Internal Revenue Service

Name of the organization

CN WODEHOUSE FACULTY BENEFIT TRUST AT SEABURY HALL

Employer identification number 99-0301434

| CONFLICT                              | OF            | INTERI   | EST 1           | POLICY      | , WHI       | <u>CH 1</u>   | S AVA                                 | ILABI       | E TO  | THE BI | ENEF        | CIA      | RY       |
|---------------------------------------|---------------|--|-----------------|-------------|-------------|---------------|---------------------------------------|-------------|-------|--------|-------------|----------|----------|
| ORGANIZA'                             | rion          | UPON   | REQ             | UEST.       | AUDI        | TED           | FINAN                                 | CIAL        | STATE | MENTS  | ARE         | NOT      | PREPARED |
| FOR THE                               | <u>rrus</u>   | т  |                 |             |             | ·             |                                       |             |       |        |             | _        |          |
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Schedule R (Form 990) 2008 Employer identification number 99-0301434 OMB No 1545-0047 Open to Public Inspection Direct controlling Direct controlling End-of-year assets status (if section Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, lines 33, 34, 35, 36, or 37. Public charity 501(c)(3)) Œ ~ 170(B)(1)(A)(II Total income Exempt Code section e ê Related Organizations and Unrelated Partnerships Legal domicile (state or Legal domicile (state or foreign country) foreign country) ► See separate instructions. HAWAII CN WODEHOUSE FACULTY BENEFIT TRUST AT SEABURY HALL LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. EDUCATIONAL INSTITUTION Primary activity Primary activity <u>@</u> Identification of Related Tax-Exempt Organizations Identification of Disregarded Entitles Name, address, and EIN Name, address, and EIN of disregarded entity of related organization SEABURY HALL - 99-0110784 Name of the organization MAKAWAO, HI 96768 Department of the Treasury Internal Revenue Service 480 OLINDA ROAD SCHEDULE R (Form 990) Parti Part #

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CN WODEHOUSE FACULTY BENEFIT TRUST AT SEABURY HALL

Schedule R (Form 990) 2003 AT SEABURY HALL

Part ( Identification of Related Organizations Taxable as a Partnership

| LUBI General or in box managing partner/ hedule partner/ n 1065) Yes No |      |         |  | (H)<br>Percentage<br>rr ownership              |     |   |  |
|---|------|---------|--|--|-----|---|--|
| Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)                 |      |         |  | (G) Share of end-of-year assets                |     |   |  |
| (H) Disproportionate allocations? Yes No                                |      |         |  | (F)<br>Share of total<br>income                |     | - |  |
| (G)<br>Share of<br>end-of-year<br>assets                                |      |         |  |  |     |   |  |
| (F)<br>Share of total<br>income   |      |         |  | (E) Type of entity (C corp., S corp, or trust) |     |   |  |
|   |      | <u></u> |  | (D) Direct controlling entity                  |     |   |  |
| (E) Predominant income (related, investment, unrelated)                 |      |         |  |  |     |   |  |
|   | <br> |         | <u> </u>   | (C) Legal domicle (state or foreign            |     |   |  |
| (D) Direct controlling entity   |      |         | Trust  | (B)<br>Primary activity                        |     |   |  |
| (C) Legal domidle (state or foreign                                     |      |         | oration or   | Ę.   | 1 1 |   |  |
| (B) Primary activity  |      |         | anizations Taxable as a Corp   | Z  |     |   |  |
| (A) Name, address, and EIN of related organization                      |      |         | Patt W Identification of Related Organizations Taxable as a Corporation or Trust |  |     |   |  |

Schedule R (Form 990) 2008

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# CN WODEHOUSE FACULTY BENEFIT TRUST AT SEABURY HALL

Schedule R (Form 990) 2008

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Yes

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 (B) Transaction type (a-r) : . :::: 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? : Performance of services or membership or fundralsing solicitations by other organization(s) : : : : : Performance of services or membership or fundraising solicitations for other organization(s) . Purchase of assets from other organization(s) .................................. Exchange of assets
Lease of facilities, equipment, or other assets to other organization(s) Loans or loan guarantees to or for other organization(s) Reimbursement paid by other organization for expenses Gift, grant, or capital contribution to other organization(s) Name of other organization(s) Lease of facilities, equipment, or other assets from other organization(s) .... a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity Reimbursement paid to other organization for expenses  $\dots$ c Gift, grant, or capital contribution from other organization(s) Other transfer of cash or property from other organization(s) Note. Complete line 1 if any entity is listed in Parts II, III, or IV. Sale of assets to other organization(s) Sharing of paid employees Exchange of assets ۵ v 6 0 E গ্ৰ

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**Amount involved** 

Schedule R (Form 990) 2008

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CN WODEHOUSE FACULTY BENEFIT TRUST

Schedule R (Form 990) 2008 AT SEABURY HALL

Part Wi 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.

| Illar was 1101 a relation organization, dee instruction of the control of the con | Ó                | <b>3</b>                   | é                                     | 9           | 9          | 9                              | £           |
|--|------------------|----------------------------|---------------------------------------|-------------|------------|--------------------------------|-------------|
| 3  |                  |                            |                                       |             | Dispersor- | IRI I-V about                  |             |
| Name, address, and EIN   | Primary activity |                            | Are all partners<br>section 501(c)(3) | n           | tionate    | amount in box 20               | managing    |
| of entity  |                  | (state or toreign country) | Yes No                                | year assers | Yes No     | of Schedule K-1<br>(Form 1085) | 1 1         |
|  |                  |                            |                                       |             |            |                                |             |
|  |                  |                            |                                       |             |            |                                |             |
|  |                  |                            |                                       |             |            |                                |             |
|  |                  |                            |                                       |             |            |                                |             |
|  |                  |                            |                                       |             |            |                                |             |
|  |                  |                            |                                       |             |            |                                | -           |
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BANK OF HAWAII P.O. BOX 3170 HONOLULU, HI 96802

# RETURN OF ORGANIZATION EXEMPT FROM INCOME TAX FORM 990 FYE 6/30/09

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| EIN;       | NAME , , , , , , , , , , , , , , , , , , ,          |
| 99-0296250 | CN WODEHOUSE BISHOP MUSEUM TRUST                    |
| 80-0094227 | CN WODEHOUSE HAWAII CHILDREN'S TRUST                |
| 99-0301432 | CN WODEHOUSE HAWAII PREPARATORY ACADEMY             |
| 99-0301435 | CN WODEHOUSE FACULTY BENEFIT TRUST @ PUNAHOU SCHOOL |
| 99-0301434 | CN WODEHOUSE FACULTY BENEFIT TRUST @ SEABURY HALL   |