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Form **990-EZ**Department of the Treasury
Internal Revenue Service**Short Form**
Return of Organization Exempt From Income TaxUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

► Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$1,000,000 and total assets less than \$2,500,000 at the end of the year may use this form.

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

OMB No. 1545-1150

2008**Open to Public
Inspection**

A For the 2008 calendar year, or tax year beginning September 1 , 2008, and ending August 31 , 20 09	
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input checked="" type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization Association for Documentary Editing Number and street (or P.O. box, if mail is not delivered to street address) Room/suite #1 Old State Capitol Plaza City or town, state or country, and ZIP + 4 Springfield, IL 62701-1512
D Employer identification number 52 : 1227864	
E Telephone number (217) 785-9130	
F Group Exemption Number . . . ►	
G Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual Other (specify) ►	
H Check <input checked="" type="checkbox"/> if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)	
I Website: ► www.documentaryediting.org	
J Organization type (check only one) — <input checked="" type="checkbox"/> 501(c) (3) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527	
K Check <input type="checkbox"/> if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.	
L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$1,000,000 or more, file Form 990 instead of Form 990-EZ. ► \$	

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)			
Revenue	1 Contributions, gifts, grants, and similar amounts received	1	2212
	2 Program service revenue including government fees and contracts	2	17100
	3 Membership dues and assessments	3	10770
	4 Investment income	4	1147
	5a Gross amount from sale of assets other than inventory	5a	
	5b Less: cost or other basis and sales expenses	5b	
	5c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)	5c	
	6 Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>		
	6a Gross revenue (not including \$ of contributions reported on line 1)	6a	
	6b Less: direct expenses other than fundraising expenses	6b	
6c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c		
Revenue	7a Gross sales of inventory, less returns and allowances	7a	
	7b Less: cost of goods sold	7b	
	7c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
	8 Other revenue (describe ► Boyd and Boydston Funds)	8	240
	9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8.	9	31469
Expenses	10 Grants and similar amounts paid (attach schedule)	10	6962
	11 Benefits paid to or for members	11	
	12 Salaries, other compensation, and employee benefits	12	
	13 Professional fees and other payments to independent contractors	13	
	14 Occupancy, rent, utilities, and maintenance	14	
	15 Printing, publications, postage, and shipping	15	4901
	16 Other expenses (describe ► See attached schedule)	16	15944
	17 Total expenses. Add lines 10 through 16	17	27807
Net Assets	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	3662
	19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	81622
	20 Other changes in net assets or fund balances (attach explanation)	20	
	21 Net assets or fund balances at end of year. Combine lines 18 through 20	21	85284

Part II Balance Sheets. If Total assets on line 25, column (B) are \$2,500,000 or more, file Form 990 instead of Form 990-EZ. (See the instructions for Part II.)			
		(A) Beginning of year	(B) End of year
22 Cash, savings, and investments		81622	85284
23 Other assets (describe ► and buildings)			
24 Total assets		81622	85284
25 Total liabilities (describe ► See attached schedule)			
26 Net assets or fund balances (line 27 of column (B) must agree with line 21)		81622	85284

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

Cat No 106421

Form **990-EZ** (2008)

Part V Other Information (Note the statement requirements in the instructions for Part VI.)

	Yes	No
33 Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33	✓
34 Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	34	✓
35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.		
a Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?	35a	✓
b If "Yes," has it filed a tax return on Form 990-T for this year?	35b	
36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N	36	✓
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a		
b Did the organization file Form 1120-POL for this year?	37b	✓
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?	38a	✓
b If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9	39a	
b Gross receipts, included on line 9, for public use of club facilities	39b	
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶		
b Section 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I	40b	✓
c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶		
d Enter amount of tax on line 40c reimbursed by the organization ▶		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.	40e	✓
41 List the states with which a copy of this return is filed. ▶		
42a The books are in care of ▶ <u>John A. Lupton</u> Telephone no. ▶ <u>(217) 638-6512</u>		
Located at ▶ <u>625 South Second St., Springfield, IL</u> ZIP + 4 ▶ <u>62704</u>		
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	✓
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 .		
c At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c	✓
If "Yes," enter the name of the foreign country: ▶		
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43		☐
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	✓
45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45	✓

Part VI Section 501(c)(3) organizations only. All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51.

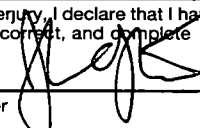
- | | Yes | No |
|--|-------------------------------------|-------------------------------------|
| 46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | | <input checked="" type="checkbox"/> |
| 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II | <input checked="" type="checkbox"/> | |
| 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | | <input checked="" type="checkbox"/> |
| 49a Did the organization make any transfers to an exempt non-charitable related organization? | | <input checked="" type="checkbox"/> |
| 49b If "Yes," was the related organization(s) a section 527 organization? | | |
- 50** Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
None				
Total number of other employees paid over \$100,000 ▶				

- 51** Complete this table for the five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
None		
Total number of other independent contractors each receiving over \$100,000 . . ▶		

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Signature of officer:  Date: 12 January 2010

John A. Lupton, Treasurer
Type or print name and title

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Preparer's Identifying Number (See instructions)
Firm's name (or yours if self-employed), address, and ZIP + 4	EIN	Phone no ()	

May the IRS discuss this return with the preparer shown above? See instructions ☐ Yes ☐ No

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

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.

OMB No 1545-0047

2008

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Name of the organization

Association for Documentary Editing

Employer identification number

52 : 1227864

Part I Reason for Public Charity Status (All organizations must complete this part.) (see instructions)

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

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

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

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

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

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
Total									

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

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

Section B. Total Support

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

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	%
16a 33⅓% support test—2008. If the organization did not check the box on line 13, and line 14 is 33⅓% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 33⅓% support test—2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33⅓% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
17a 10%-facts-and-circumstances test—2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 10%-facts-and-circumstances test—2007. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ► <input type="checkbox"/>		

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	11965	13860	14367	10380	12982	63554
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	14959	15026	15926	16950	16975	79836
3 Gross receipts from activities that are not an unrelated trade or business under section 513	0	0	0	0	0	0
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0	0	0	0
5 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0	0	0	0
6 Total. Add lines 1-5	26924	28886	30293	27330	29957	143390
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	1260	1650	2115	1935	3034	9994
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000	0	0	0	0	0	0
c Add lines 7a and 7b	1260	1650	2115	1935	3034	9994
8 Public support. (Subtract line 7c from line 6.)						133396

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6	26924	28886	30293	27330	29957	143390
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	208	1194	3165	1607	647	6821
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975	0	0	0	0	0	0
c Add lines 10a and 10b	208	1194	3165	1607	647	6821
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on	0	0	0	0	0	0
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)	0	0	0	0	0	0
13 Total support. (Add lines 9, 10c, 11, and 12.)						150211
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	89 %
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	90 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	5 %
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	5 %

- 19a 33⅓ % support tests—2008.** If the organization did not check the box on line 14, and line 15 is more than 33⅓ %, and line 17 is not more than 33⅓ %, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☒
- b 33⅓ % support tests—2007.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33⅓ %, and line 18 is not more than 33⅓ %, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☐
- 20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► ☐

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities
For Organizations Exempt From Income Tax Under section 501(c) and section 527
▶ **To be completed by organizations described below.**
▶ **Attach to Form 990 or Form 990-EZ.**

OMB No 1545-0047
2008
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If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then

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

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

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

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

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

Name of organization

Employer identification number

Association for Documentary Editing

52

1227864

Part I-A To be completed by all organizations exempt under section 501(c) and section 527 organizations.
See the instructions for Schedule C for details.

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political expenditures ▶ \$
- 3 Volunteer hours

Part I-B To be completed by all organizations exempt under section 501(c)(3).
See the instructions for Schedule C for details.

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 . . . ▶ \$
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 . . . ▶ \$
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? . . . ☐ Yes ☐ No
- 4a Was a correction made? ☐ Yes ☐ No
- b If "Yes," describe in Part IV.

Part I-C To be completed by all organizations exempt under section 501(c), except section 501(c)(3).
See the instructions for Schedule C for details.

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$
- 3 Total of direct and indirect exempt function expenditures. Add lines 1 and 2 and enter here and on Form 1120-POL, line 17b ▶ \$
- 4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No
- 5 State the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made. Enter the amount paid and indicate if the amount was paid from the filing organization's funds or were political contributions received and promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

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

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

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

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

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)															
b Total lobbying expenditures to influence a legislative body (direct lobbying)															
c Total lobbying expenditures (add lines 1a and 1b)															
d Other exempt purpose expenditures															
e Total exempt purpose expenditures (add lines 1c and 1d)															
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.															
<table border="1"> <thead> <tr> <th>If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000</td> </tr> </tbody> </table>	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000			
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
g Grassroots nontaxable amount (enter 25% of line 1f)															
h Subtract line 1g from line 1a. Enter -0- if line g is more than line a															
i Subtract line 1f from line 1c. Enter -0- if line f is more than line c															
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?			<input type="checkbox"/> Yes <input type="checkbox"/> No												

4-Year Averaging Period Under Section 501(h)

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

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) Total
2a Lobbying non-taxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots non-taxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

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

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?	✓		
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?		✓	
c Media advertisements?		✓	
d Mailings to members, legislators, or the public?		✓	
e Publications, or published or broadcast statements?		✓	
f Grants to other organizations for lobbying purposes?	✓		1242
g Direct contact with legislators, their staffs, government officials, or a legislative body?	✓		0
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means?		✓	
i Other activities? If "Yes," describe in Part IV		✓	
j Total lines 1c through 1i			
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		✓	
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

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

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

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

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

Part IV Supplemental Information

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

Part II-B, line 1f: The Association for Documentary Editing donated \$3,500 to the National Coalition for History, of which 20 percent (\$700) was used by NCH for lobbying purposes. The ADE also donated \$2,712 to the National Humanities Alliance, of which 20 percent was used by the NHA for lobbying purposes. The NCH and NHA supplied the percentage of donations used for lobbying purposes. The total amount used for lobbying purposes is \$1,242.

Part II-B, line 1a and 1g: Individuals members of the ADE occasionally contact legislators, their staffs, government officials, or a legislative body on their own initiative to monitor developments that may affect their projects or documentary editing in general. The ADE does not monitor these occasional contacts or provide any financial support for such contact.

Form 990-EZ, Tax Year 2008
Association for Documentary Editing, 52-1227864
Net Assets Calculations

81,622	Ending assets reported on 990-EZ for FY2007-2008
3,662	Increase for FY2008-2009 (line 18)
<hr/>	

85,284	Ending assets for FY2008-2009 (line 21)
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Cash assets on August 31, 2009, as given on treasurer's annual report

7,892	General Checking Account
35,279	General Savings Account
13,130	Certificate of Deposit
21,465	Boyd Fund
7,518	Boydston Fund
<hr/>	

85,284

Form 990-EZ, Tax Year 2008

Association for Documentary Editing, 52-1227864

Part I, Line 10: Grants and similar amounts paid

Awards	Recipients	Amount
Butterfield Award	Mary-Jo Kline* 73 Wellington Circle Ruckersville, VA 22968	\$750
Contributions		
Informational Purposes (80%) Lobbying Purposes (20%)	National Coalition for History 400 A Street, SE Washington, DC 20003	\$3,500
Informational Purposes (80%) Lobbying Purposes (20%)	National Humanities Alliance 21 Dupont Circle NW, Suite 800 Washington, DC 20036	\$2,712
Total amount reported on Line 10		\$6,962

*Mary-Jo Kline is not related to or employed by any officer of the Association for Documentary Editing.

Form 990-EZ, Tax Year 2008
Association for Documentary Editing, 52-1227864
Part I, Line 16: Other expenses

Purposes	Amount
Convention Expenses	\$12,256
Travel Grants	2,500
Award Plaques	53
Bank Fees	326
Money Returned to National Endowment for the Humanities	809
<hr/>	
Total	\$15,944

Form 990-EZ, Tax Year 2008
Association for Documentary Editing, 52-1227864
Part III, Line 31a: Other Program Services

Program Services	Amount
Butterfield Award	\$750
Award Plaques	53
<hr/>	
Total amount reported on Line 31a	\$803

Schedule A, Form 990-EZ, Tax Year 2008
Association for Documentary Editing, 52-1227864
Part III, Line 7a: List of "Disqualified Persons"

FY2008: Officers of the organization and total amounts received from them for contributions, dues, convention fees, and book purchases.

Cathy Moran Hajo	\$317
Kenneth M. Price	225
Michael E. Stevens	330
Jennifer Stertzer	230
John A. Lupton	265
Sharon Ritenour Stevens	305
Philander D. Chase	597
Helen Deese	410
Martha J. King	355

Total 2008 amount from officers	\$3,034
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FY2007: Officers of the organization and total amounts received from them for contributions, dues, convention fees, and book purchases.

Michael E. Stevens	\$250
Cathy Moran Hajo	185
Ronald A. Bosco	185
Lisa Francavilla	185
John A. Lupton	220
Richard Leffler	345
Helen Deese	70
Mary A. Y. Gallagher	220
Martha J. King	275

Total 2007 amount from officers	\$1,935
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FY2006: Officers of the organization and total amounts received from them for contributions, dues, convention fees, and book purchases.

Ronald A. Bosco	\$250
Michael E. Stevens	415
Roger Bruns	210
Christine S. Patrick	210
John A. Lupton	210
Richard Leffler	240
Kenneth M. Price	35
Mary A. Y. Gallagher	210
Martha J. King	335

Total 2006 amount from officers	\$2,115
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FY2005: Officers of the organization and total amounts received from them for contributions, dues, convention fees, and book purchases.

Roger Bruns	\$202
Ronald A. Bosco	142
Dennis Conrad	407
Christine S. Patrick	271
John A. Lupton	208
Larry Hickman	173
Michael E. Stevens	35
Kenneth M. Price	142
Mary A. Y. Gallagher	70

Total 2005 amount from officers	\$1,650
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FY2004: Officers of the organization and total amounts received from them for contributions, dues, convention fees, and book purchases.

Dennis Conrad	\$0
Roger Bruns	145
Esther Katz	185
Anne Decker Cecere	240
John A. Lupton	165
Larry Hickman	150
Ronald A. Bosco	145
Michael E. Stevens	70
Kenneth M. Price	160

Total 2004 amount from officers	\$1,260
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ADE Treasurer's Report
Fiscal Year, September 1, 2008–August 31, 2009

Despite a horrendous economy last year, the finances of the Association for Documentary Editing did rather well with a net increase of \$3,731. The increase can be attributed to two main factors: 1) membership income increased by 10 percent (nearly \$1,000); and more importantly 2) contributions were up substantially from the previous year because of Beth Luey's generous matching membership contribution. The conference in Tucson also did very well with a profit of just over \$3,000. Other income sources include *Documentary Editing* subscriptions and interest. Even though interest rates continued to decline, I was able to take advantage of laddering several CDs. With the anticipated transfer of assets to the new treasurer, I have been moving money into the ADE saving's account as the CDs have matured. Currently, there is only one CD left to mature.

Expenses primarily remained level from the previous year. With the decision to print *Documentary Editing* annually, we were able to save budgeted money. One addition to the expenses category was bank fees. We have begun to accept membership payment via PayPal. The cost for this is fairly minimal with PayPal taking 2.9 percent plus 30 cents per transaction.

The Boyd and Boydston Award Funds remain in good shape with donations of more than \$100 to each. The Boyd fund produced \$373 in interest income, and the Boydston fund produced \$130 in interest income.

Our checking account, savings account, and certificates of deposit are held in Chase Bank accounts in Springfield, Illinois. The Boyd and Boydston Award Funds are held in money market accounts with Capital One. All ADE accounts are maintained in Quicken, and those computer files are backed up daily on Illinois Historic Preservation Agency servers.

Finally, after five years of being treasurer, I am turning over my responsibilities to the very capable John Fierst. I want to thank all of those who have assisted in my fiscal duties, particularly Bill Ferraro and Gary Moulton, who served on the finance committee for my entire term. Phil Chase has always provided sound financial advice as another former treasurer, and all of the secretaries have been wonderful to work with: Anne Cecere, Christine Patrick, Lisa Francavilla, and Jennifer Stertz.

John A. Lupton
Treasurer

ADE Treasurer's Report
Fiscal Year, September 1, 2008–August 31, 2009

Income	2007-2008 actual	2008-2009 budget	2008-2009 actual
Dues	\$ 9,840	\$ 12,000	\$ 10,770
Contributions	540	5,500	2,212
Conferences	16,505	14,000	15,315
Subscriptions	445	500	1,660
Book sales	55	100	125
Interest	1,607	1,500	647
Miscellaneous	8	200	0
Totals	\$ 29,000	\$ 33,800	\$ 30,729

Expenses	2007-2008 actual	2008-2009 budget	2008-2009 actual
Conferences	\$ 11,258	\$ 12,000	\$ 12,256
<i>Documentary Editing</i>	10,323	9,500	4,781
Natl Coalition for History	3,500	4,000	3,500
National Humanities Alliance	2,650	3,000	2,712
Butterfield Award	750	750	750
Travel grants	2,000	2,500	2,500
Office supplies/postage	2,141	1,500	120
Award plaques	252	50	53
Bank Fees	0	0	326
Miscellaneous	205	500	0
Totals	\$39,064	\$ 33,800	\$26,998

Difference: ()	\$ (10,064)	\$ 3,731
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Assets (non-restricted)

Date	Checking	Savings	CDs	Total
August 31, 2004	\$2,555	\$55,291	\$0	\$57,846
August 31, 2005	4,409	19,491	30,581	54,481
August 31, 2006	8,628	19,848	32,443	60,919
August 31, 2007	4,979	22,557	35,099	62,635
August 31, 2008	4,808	4,763	43,000	52,571
August 31, 2009	7,892	35,279	13,130	56,302

ADE Proposed Budget
Fiscal Year, September 1, 2009–August 31, 2010

Income

Dues	\$ 11,000
Contributions (current & residual)	2,500
Conferences (Springfield)	14,500
<i>Documentary Editing</i> subscriptions	1,500
Book sales	650
Interest	500
Miscellaneous	<u>200</u>
Total	\$ 30,850

Expenses

Conferences	\$ 10,000
<i>Documentary Editing</i>	9,000
National Coalition for History	4,250
National Humanities Alliance	3,250
Butterfield Award	750
Travel grants	2,500
Office supplies/postage	500
Award plaques	100
Miscellaneous	<u>500</u>
Total	\$ 30,850

ADE Boyd and Boydston accounts
Fiscal Year, September 1, 2008–August 31, 2009

Julian P. Boyd Award Fund

Opening balance, September 1, 2008	\$ 20,958
Paid out, FY 2008–09	0
Contributions, FY 2008–09	135
Interest, FY 2008–09	373
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Balance, August 31, 2009	\$ 21,465

The Boyd Award Fund has \$21,465 in a Capital One Money Market Account, currently earning 1.15 percent interest. The Fund has now resided in a money market account for two full fiscal years. The interest rates have bottomed out, yet the account still earned more than a third of an award that is disbursed every three years. As long as the fund remains in an interest-bearing account such as a money market account, even with interest rates as low as they are, it should remain self-sufficient.

Jo Ann Boydston Award Fund

Opening balance, September 1, 2008	\$ 7,284
Paid out, FY 2008–09	0
Contributions, FY 2008–09	105
Interest, FY 2008–09	130
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Balance, August 31, 2009	\$ 7,518

The Boydston Award Fund has \$7,518 in a Capital One Money Market Account currently earning 1.15 percent interest. The Fund has now resided in a money market account for two full fiscal years. The interest rates have bottomed out, yet the account still earned more than forty percent of an award that is disbursed every two years. As long as the fund remains in an interest-bearing account such as a money market account, even with interest rates as low as they are, it should remain self-sufficient.

ADE Dues, Contributions, and Subscriptions
Fiscal Year, September 1, 2008–August 31, 2009

Dues		Contributions (non-restricted)	
Regular	\$ 5,740	General fund	\$ 2,212
164 @ \$35			
Sustaining	1,120		
16 @ \$70			
Sponsor	2,900	Subscriptions	
29 @ \$100 each			
Patron	500	Institutional	\$ 1,660
2 @ \$250 each			
Student	60		
4 @ \$15 each			
Retired	300		
20 @ \$15 each			
Overseas	150		
3 @ \$50 each			
<hr/> Total			
	\$10,770		

ADE 2008 Conference Financial Report
Tucson, Arizona
Fiscal Year, September 1, 2008–August 31, 2009

Income		Expenses	
Registration (78 @ \$75; 9 @ \$90)	\$ 6,660.00	Westward Look Resort	\$ 9,532.10
Breakfast (58 @ \$25)	1,450.00	South of the Border Reception transportation	642.60
Banquet (88 @ \$65; 1 @ \$45)	5,765.00	Tour	657.25
Tour (36 @ \$40)	<u>1,440.00</u>	Refunds	540.00
		Secretary Travel	549.00
		Jason's Deli Tour Lunch	<u>335.52</u>
TOTAL	\$ 15,315.00	TOTAL	\$ 12,256.47
Balance (\$15,315 minus \$12,256.47)			\$ 3,058.53

ADE Assets, August 31, 2009

Non-restricted

Checking Account (Chase Bank, Springfield, Illinois)	\$ 7,892
Business Savings Account (Chase Bank, Springfield, Illinois)	35,279
Certificate of Deposit, 9 month (Chase Bank, Springfield, Illinois)	<u>13,130</u>
Total non-restricted assets	\$ 56,301

Restricted

Boyd Fund (Money Market, Capital One, Houston, Texas)	\$ 21,465
Boydston Fund (Money Market, Capital One, Houston, Texas)	<u>7,518</u>
Total restricted assets	\$ 28,983

TOTAL ASSETS	\$ 85,284
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