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Form **990-EZ**

Department of the Treasury
Internal Revenue Service

Short Form 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)

OMB No 1545-1150

2008

Open to Public Inspection

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.

A For the 2008 calendar year, or tax year beginning **SEP 1, 2008** and ending **AUG 31, 2009**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type See Specific Instructions	C Name of organization Heritage Society of Austin		D Employer identification number 74-6060685			
		Number and street (or P O box, if mail is not delivered to street address)		Room/suite	E Telephone number 512.474.5198		
		P.O. Box 2113		City or town, state or country, and ZIP + 4		F Group Exemption Number ▶	
		Austin, TX 78768-2113					

Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ)

G Accounting method Cash Accrual
Other (specify) **▶**

I Website: **▶ www.heritagesocietyaustin.org**

H Check if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

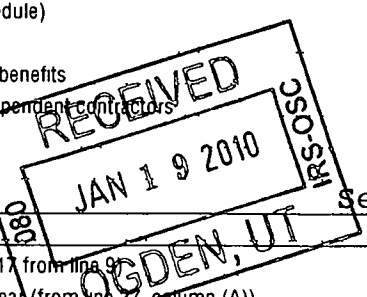
J Organization type (check only one)— 501(c) (3) ◀ (insert no) 4947(a)(1) or 527

K Check 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 **▶ \$ 316,228.**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I)

		1	2	3	4	5a	5b	5c	6a	6b	6c	7a	7b	7c	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Revenue	1	Contributions, gifts, grants, and similar amounts received															166,761.											
	2	Program service revenue including government fees and contracts															105,160.											
	3	Membership dues and assessments															31,325.											
	4	Investment income															12,982.											
	5a	Gross amount from sale of assets other than inventory																										
	5b	Less cost or other basis and sales expenses																										
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)																										
	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)																										
6b	Less direct expenses other than fundraising expenses																											
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)																											
7a	Gross sales of inventory, less returns and allowances																											
7b	Less cost of goods sold																											
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)																											
8	Other revenue (describe ▶ _____)																											
9	Total revenue Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ▶															316,228.												
Expenses	10	Grants and similar amounts paid (attach schedule)																										
	11	Benefits paid to or for members																										
	12	Salaries, other compensation, and employee benefits															82,695.											
	13	Professional fees and other payments to independent contractors															188.											
	14	Occupancy, rent, utilities, and maintenance															62,761.											
	15	Printing, publications, postage, and shipping															29,699.											
	16	Other expenses (describe ▶ _____ See Statement 1)															157,052.											
17	Total expenses Add lines 10 through 16 ▶															332,395.												
18	Excess or (deficit) for the year (Subtract line 17 from line 9)															<16,167.>												
19	Net assets or fund balances at beginning of year (from line 21, column (A)) (must agree with end-of-year figure reported on prior year's return)															1,160,255.												
20	Other changes in net assets or fund balances (attach explanation) See Statement 3															<41,569.>												
21	Net assets or fund balances at end of year Combine lines 18 through 20 ▶															1,102,519.												



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	70,300.	51,856.
23	Land and buildings	317,846.	328,052.
24	Other assets (describe ▶ _____ See Statement 2)	788,261.	725,227.
25	Total assets	1,176,407.	1,105,135.
26	Total liabilities (describe ▶ _____)	16,152.	2,616.
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	1,160,255.	1,102,519.

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

Form 990-EZ (2008)

68

21

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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		X
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		X
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?		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Sch N		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 0.		
b	Did the organization file Form 1120-POL for this year?		X
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?		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b N/A		
39	Section 501(c)(7) organizations Enter		
a	Initiation fees and capital contributions included on line 9 39a N/A		
b	Gross receipts, included on line 9, for public use of club facilities 39b N/A		
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ 0. , section 4912 ▶ 0. , section 4955 ▶ 0.		
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		X
c	Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0.		
d	Enter amount of tax on line 40c reimbursed by the organization ▶ 0.		
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		X
41	List the states with which a copy of this return is filed ▶ None		
42a	The books are in care of ▶ Jacqui Schraad Telephone no ▶ 512-474-5198 Located at ▶ P.O. Box 2113, Austin, TX ZIP + 4 ▶ 78768		
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)? 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.	42b	X
c	At any time during the calendar year, did the organization maintain an office outside of the U S ? If "Yes," enter the name of the foreign country ▶ _____	42c	X
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 N/A		
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	X
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	X

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 | | X |
| 47 | | X |
| 48 | | X |
| 49a | | X |
| 49b | | |
- 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
- 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II
- 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E
- 49a Did the organization make any transfers to an exempt non-charitable related organization?
- b 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"
- NONE

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
Total number of other independent contractors each receiving over \$100,000 ▶		

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

Sign Here Date

Signature of officer: *Jacqueline Schraad* 1-13-10

Type or print name and title: *Jacqueline Schraad, Executive Director*

Paid Preparer's Use Only

Preparer's signature: *Sherry Robinson, CPA* Date: *1/13/10* Check if self-employed

Firm's name (if self-employed), address, and ZIP + 4: *Glass & Company, P.C. 515 Congress Ave #1900 Austin, TX 78701*

Preparer's Identifying Number (See instr): *P00023096*

EIN Phone no

(512) 480-8182

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

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.")	106,192.	139,782.	198,209.	308,633.	198,086.	950,902.
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	106,192.	139,782.	198,209.	308,633.	198,086.	950,902.
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						950,902.

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	106,192.	139,782.	198,209.	308,633.	198,086.	950,902.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	9,815.	19,196.	26,391.	22,085.	12,982.	90,469.
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.)	1,987.	653.	68.	739.		3,447.
11 Total support. Add lines 7 through 10						1,044,818.
12 Gross receipts from related activities, etc (see instructions)					12	569,429.

13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	91.01 %
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	86.93 %
16a 33 1/3% support test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input checked="" type="checkbox"/> ▶
b 33 1/3% support test - 2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/> ▶
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.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 - 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 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) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support (Add lines 9, 10c, 11, and 12)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶

Section C. Computation of Public Support Percentage

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

Section D. Computation of Investment Income Percentage

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

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

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

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

Form 990-EZ	Other Expenses	Statement	1
<u>Description</u>		<u>Amount</u>	
Advertising		15,345.	
Depreciation		18,039.	
Insurance		15,901.	
Supplies		26,732.	
In-kind		1,490.	
Other		74,791.	
Employee Benefits		4,754.	
Total to Form 990-EZ, line 16		<u>157,052.</u>	

Form 990-EZ	Other Assets	Statement	2
<u>Description</u>		<u>Beg. of Year</u>	<u>End of Year</u>
Receivables		31,169.	47,158.
Other Assets		5,380.	8,558.
Investments		751,712.	669,511.
Total to Form 990-EZ, line 24		<u>788,261.</u>	<u>725,227.</u>

Form 990-EZ	Other Changes in Net Assets or Fund Balances	Statement	3
<u>Description</u>		<u>Amount</u>	
Unrealized Gain (Loss) on Investments		<41,569.>	
Total to Form 990-EZ, line 20		<u><41,569.></u>	

FORM 990-EZ

Information Regarding Transfers
Associated with Personal Benefit Contracts

Statement 4

- A) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? [] Yes [X] No
- B) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . [] Yes [X] No

Heritage Society of Austin

74-6060685

Jay Farrell P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Whit Hanks P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
August Harris III P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Marjorie Harris P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Shelly Hemingson P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Lindsay Rose Hunter P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Saundra Kirk P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Emily Little P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Peter Flagg Maxson P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
John Mayfield P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Alyson McGee P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Tere O'Connell P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Monica Penick P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
John Rosato P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Nikhil Sinha P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Edward Tasch P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Lin Team P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.

Heritage Society of Austin

74-6060685

Stephen Webb P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Michael Holleran P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Bergan Casey P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Mike Ward P.O. Box 2113, Austin, TX 78768	Director 1.50	0.	0.	0.
Jacqui Schraad P.O. Box 2113, Austin, TX 78768	Executive Director 40.00	61,200.	4,754.	0.
Totals Included on Form 990-EZ, Part IV		<u>61,200.</u>	<u>4,754.</u>	<u>0.</u>

Pioneer Farms is a living history museum devoted to the interpretation of rural life in Central Texas in the 1880s. Programs include costumed interpretation of homesteads, classes on traditional skills, demonstrations of agriculture and animal husbandry, newsletters, and ongoing acquisition and preservation of threatened historic buildings.

To promote the recognition and experience of Austin's diverse cultural heritage through the preservation of historic treasures and places.