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Form **990-EZ**

# Short Form Return of Organization Exempt From Income Tax

OMB No 1545-1150

# 2008

## Open to Public Inspection

Under 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

Department of the Treasury  
Internal Revenue Service

**A** For the 2008 calendar year, or tax year beginning **OCTOBER 01**, 2008, and ending **SEPTEMBER 30**, 20 **09**

**B** Check if applicable

- Address change
- Name change
- Initial return
- Termination
- Amended return
- Application pending

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

**C** Name of organization

**THE THEOSOPHICAL SOCIETY**

Number and street (or P O box, if mail is not delivered to street address) Room/suite

**P.O. BOX C**

City or town, state or country, and ZIP + 4

**PASADENA CA 91109-9107**

**D** Employer identification number

**23 7211774**

**E** Telephone number

**( 626 ) 797-7817**

**F** Group Exemption Number ▶

• 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.THEOSOCIETY.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 ▶ \$

### 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															00											
	2	Program service revenue including government fees and contracts															00											
	3	Membership dues and assessments															00											
	4	Investment income															00											
	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)															00											
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>																										
	6a	a Gross revenue (not including \$ _____ of contributions reported on line 1)																										
	6b	b Less: direct expenses other than fundraising expenses																										
6c	c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)															00												
7a	Gross sales of inventory, less returns and allowances																											
7b	b Less: cost of goods sold																											
7c	c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)															00												
8	Other revenue (describe ▶ _____)															00												
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8															00												
Expenses	10	Grants and similar amounts paid (attach schedule)															00											
	11	Benefits paid to or for members															00											
	12	Salaries, other compensation, and employee benefits															00											
	13	Professional fees and other payments to independent contractors															00											
	14	Occupancy, rent, utilities, and maintenance															00											
	15	Printing, publications, postage, and shipping															00											
	16	Other expenses (describe ▶ _____)															00											
17	<b>Total expenses.</b> Add lines 10 through 16															00												
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)															00											
	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)															00											
	20	Other changes in net assets or fund balances (attach explanation)															00											
	21	Net assets or fund balances at end of year (Combine lines 18 through 20)															00											

### 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	00	22 00
23	Land and buildings	00	23 00
24	Other assets (describe ▶ _____)	00	24 00
25	<b>Total assets</b>	00	25 00
26	<b>Total liabilities</b> (describe ▶ _____)	00	26 00
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	00	27 00

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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		✓
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		✓
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?		✓
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		✓
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N		✓
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ <b>37a</b> 00		
b	Did the organization file <b>Form 1120-POL</b> for this year?		✓
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?		✓
b	If "Yes," complete Schedule L, Part II and enter the total amount involved <b>38b</b> 00		
39	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on line 9 <b>39a</b> 00		
b	Gross receipts, included on line 9, for public use of club facilities <b>39b</b> 00		
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ 00 ; section 4912 ▶ 00 ; section 4955 ▶ 00		
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		✓
c	Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 00		
d	Enter amount of tax on line 40c reimbursed by the organization ▶ 00		
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.		✓
41	List the states with which a copy of this return is filed. ▶ <b>CALIFORNIA</b>		
42a	The books are in care of ▶ <b>B. Davidson</b> Telephone no. ▶ ( ) Located at ▶ <b>643 East Mariposa Street, Altadena, CA</b> ZIP + 4 ▶ <b>91109-7107</b>		
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 <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.</b>	Yes	No
42b			✓
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: ▶	Yes	No
42c			✓
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> —Check here and enter the amount of tax-exempt interest received or accrued during the tax year ▶ <b>43</b> ▶ <input type="checkbox"/>		
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	Yes	No
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	Yes	No
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  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 47  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 48  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 49a | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 49b | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
- 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."

(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 . . . ▶		

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

**Sign Here**

Signature of officer: *B Davidson* Date: 01-30-10

Type or print name and title: B DAVIDSON, TREASURER

**Paid Preparer's Use Only**

Preparer's signature: *Joseph H. Johns* Date: 30 Jan '10

Firm's name (or yours if self-employed), address, and ZIP + 4: JOSEPH H. JOHNS, 1751 Curtis Avenue, Manhattan Beach, CA 90266

Check if self-employed:  Preparer's Identifying Number (See instructions): 498265266

EIN: Phone no: 310 374-8610

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



**THEOSOPHICAL SOCIETY**  
October 1, 2008 - September 30, 2009

FORM 990-2008  
Schedule Page: 01 of 03  
Employer Identification No.: 23-721174

The income and expenditure of the Theosophical Society is handled by the Theosophical Endowment Corporation, a non-profit, tax-exempt Corporation formed in 1942 by the Theosophical Society to handle its business affairs. A Form 990 "Return of Organization Exempt From Income Tax" is filed annually by the Theosophical Endowment Corporation. The Articles of Incorporation of Theosophical Endowment Corporation state:

"That we, the undersigned present Cabinet Officers of an unincorporated religious, scientific, philosophical, humanitarian, and literary society, namely, The Theosophical Society, all being residents of the State of California and the majority of citizens of the United States of America, under and by virtue of the laws of the State of California, have this day voluntarily associated ourselves together for the purpose of forming a non-profit corporation.

We hereby certify that:

**I**

The name of the corporation hereby organized shall be:

**THEOSOPHICAL ENDOWMENT CORPORATION**

**II**

This corporation is formed for the purpose of receiving, taking, holding, and managing all property which may now be held, or which may hereafter be received through purchase, gift, grant, devise or bequest, by the International Headquarters of the said The Theosophical Society or by any of its Officers or Fellows for the use of the said International Headquarters in pursuance of its work in furtherance of the objects of the said The Theosophical Society as stated in its Constitution, to wit:

- (a) To diffuse among men a knowledge of the laws inherent in the Universe,
- (b) To promulgate the knowledge of the essential unity of all that is, and to demonstrate that this unity is fundamental in Nature;
- (c) To form an active brotherhood among men;
- (d) To study ancient and modern religion, science, and philosophy;
- (e) To investigate the powers innate in man;
- (f) To take and receive gifts, legacies, and devises of real and personal property for the furtherance of its work and objectives, including gifts under wills, testamentary trusts and all other forms of conveyance or transfer."

**THEOSOPHICAL SOCIETY**

October 1, 2008 - September 30, 2009

FORM 990-2008

Schedule Page: 02 of 03

Employer Identification No.: 23-721174

**Part IV LIST OF CABINET OFFICERS**

Belderis, James T., Officer 643 East Mariposa Street Altadena, CA 91001	unsalaried
Davidson, Brunhilde S., Assistant Treasurer 643 East Mariposa Street Altadena, CA 91001	unsalaried
Donant, Alan E., Assistant Secretary 643 East Mariposa Street Altadena, CA 91001	unsalaried
Dougherty, Sarah B., Officer 6125 125th Avenue SE Bellevue, WA 98006	unsalaried
Dougherty, William A., Chairman 6125 125th Avenue SE Bellevue, WA 98006	unsalaried
Thackara, Regina, Secretary 1859 La Paz Road Altadena, CA 91001	unsalaried
Thackara, William T.S., Treasurer-General 1859 La Paz Road Altadena, CA 91001	unsalaried
Wietersen, David J., Officer 401 East Sierra Madre Boulevard Sierra Madre, CA 91024	unsalaried
Wolfe, Wynn C., Officer 530 Cortez Road Arcadia, CA 91006	unsalaried
Lundhberg-Kuhmonen, Linda, Officer Smedjevagen 5, 5 TR S-191 49 Sollentuna Sweden	unsalaried
Rijken van Olst, Bas T. Narcislaan 339 2555 LS The Hague The Netherlands	unsalaried
Zebrowski, Armin Bohmreute 9 71735 Eberdingen Germany	unsalaried

**THEOSOPHICAL SOCIETY**  
October 1, 2008 - September 30, 2009

FORM 990-2008  
Schedule Page: 03 of 03  
Employer Identification No.: 23-721174

**RELATED TAX EXEMPT ORGANIZATION:** THEOSOPHICAL ENDOWMENT CORPORATION

**See:** ARTICLES OF INCORPORATION, namely:

ARTICLE II

"This corporation is formed for the purpose of receiving, taking, holding, and managing all property which may now be held, or which may hereafter be received through purchase, gift, grant, devise or bequest, by the International Headquarters of the said Theosophical Society or by any of its Officers or Fellows for the use of the said International Headquarters in pursuance of its work in furtherance of the objects of the said Theosophical Society as stated in its Constitution, to wit:

- (a) To diffuse among men a knowledge of the laws inherent in the Universe;
- (b) To promulgate the knowledge of the essential unity of all that is, and to demonstrate that this unity is fundamental in Nature;
- (c) To form an active brotherhood among men;
- (d) To study ancient and modern religion, science, and philosophy;
- (e) To investigate the powers innate in man;
- (f) To take and receive gifts, legacies, and devises of real and personal property for the furtherance of its work and objectives, including gifts under wills, testamentary trusts, and all other forms of conveyance or transfer."

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**END SCHEDULE**

October 1, 2008 - September 30, 2009

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