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Form 990-EZ

Department of the Treasury  
Internal Revenue ServiceShort 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

2009

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 \$500,000 and total assets less than \$1,250,000 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 2009 calendar year, or tax year beginning and ending

B Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization <b>ANCIENT AND ACCEPTED SCOTTISH RITE OF NEW MEXICO, SANTA FE LODGE OF PERFECTION</b>	D Employer identification number <b>85-0067235</b>
	E Number and street (or P O box, if mail is not delivered to street address) <b>P O BOX 2042</b>	F Room/suite <b>505-982-4414</b>
	G City or town, state or country, and ZIP + 4 <b>SANTA FE, NM 87504-2024</b>	H 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: ► **N/A**H Check ►  if the organization is notJ Tax-exempt status (check only one) —  501(c) (10) (insert no)  4947(a)(1) or  527

required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

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 Form 990-EZ or Form 990 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 \$500,000 or more, file Form 990 instead of Form 990-EZ ► **\$ 359,250.**

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

1 Contributions, gifts, grants, and similar amounts received	1 17,203.
2 Program service revenue including government fees and contracts	2 9,885.
3 Membership dues and assessments	3 79,902.
4 Investment income	4 85,781.
5a Gross amount from sale of assets other than inventory	STMT 5 5a 147,877.
b Less cost or other basis and sales expenses	5b 154,548.
c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c -6,671.
6 Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ► <input type="checkbox"/>	
a Gross revenue (not including \$ _____ of contributions reported on line 1)	6a
b Less direct expenses other than fundraising expenses	6b
c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c
7a Gross sales of inventory, less returns and allowances	7a
b Less cost of goods sold	7b
c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c
8 Other revenue (describe ► <b>RECEIVED</b> NOV 19 2010 SEE STATEMENT 4 )	8 18,602.
9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9 204,702.
10 Grants and similar amounts paid (attach schedule)	10
11 Benefits paid to or for members	11
12 Salaries, other compensation, and employee benefits	12 92,370.
13 Professional fees and other payments to independent contractors	13
14 Occupancy, rent, utilities, and maintenance	14 7,388.
15 Printing, publications, postage, and shipping	15
16 Other expenses (describe ► SEE STATEMENT 1 )	16 160,821.
17 Total expenses. Add lines 10 through 16	17 260,579.
18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18 -55,877.
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)	19 702,585.
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	21 646,708.

## Part II Balance Sheets. If Total assets on line 25, column (B) are \$1,250,000 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	258,757.22	278,292.
23 Land and buildings	26,103.23	25,492.
24 Other assets (describe ► SEE STATEMENT 2 )	458,744.24	368,637.
25 Total assets	743,604.25	672,421.
26 Total liabilities (describe ► SEE STATEMENT 3 )	41,019.26	25,713.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	702,585.27	646,708.

23



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

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? If "Yes," attach a conformed copy of the changes

	Yes	No
33		X
34		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 why the organization did not report the income on Form 990-T

a Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?  
 b If "Yes," has it filed a tax return on Form 990-T for this year?

35a	X
35b	N/A

36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Sch N

36	X
37b	X

37a Enter amount of political expenditures, direct or indirect, as described in the instructions ► 37a 0.

37a	0.
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b Did the organization file Form 1120-POL for this year?

38a	X
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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 outstanding at the end of the period covered by this return?

b If "Yes," complete Schedule L, Part II and enter the total amount involved

38b N/A

39 Section 501(c)(7) organizations Enter

39a N/A

a Initiation fees and capital contributions included on line 9

39b N/A

b Gross receipts, included on line 9, for public use of club facilities

40a Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ► N/A, section 4912 ► N/A, section 4955 ► N/A

40b	N/A
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b Section 501(c)(3) and 501(c)(4) organizations Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I

c Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ► N/A

d Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization ► N/A

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	X
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41 List the states with which a copy of this return is filed ► NM

42a The organization's books are in care of ► DANIEL SUTCLIFFE Telephone no ► 505-982-4414  
 Located at ► 463 PASEO DE PERALTA, SANTA FE, NM ZIP + 4 ► 87501

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)?

	Yes	No
42b		X

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	X
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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 N/A

43	N/A
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44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ

	Yes	No
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
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**Part VI** **Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

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 Yes  No   
46

47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II 47

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E 48

49a Did the organization make any transfers to an exempt non-charitable related organization?  
b If "Yes," was the related organization a section 527 organization? 49a

49b 49b

50 Complete this table for the organization's 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" 50

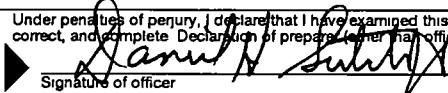
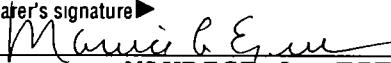
(a) Name and address of each employee paid more than \$100,000 N/A	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances

f Total number of other employees paid over \$100,000 ► 51

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

(a) Name and address of each independent contractor paid more than \$100,000 N/A	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 ► 68

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 11/15/10	
► DANIEL SUTCLIFFE, SECRETARY Type or print name and title			
Paid Preparer's Use Only	Preparer's signature 	Date 11/15/10	Check if self-employed <input checked="" type="checkbox"/> X
	Firm's name (or yours if self-employed), address, and ZIP + 4 MAURICE A. EZELL, C.P.A. POST OFFICE BOX 1815 SANTA FE, NM 87504-1815		Preparer's identifying number (See instr) EIN ► Phone ► no. (505) 983-4307

May the IRS discuss this return with the preparer shown above? See instructions

►  Yes  No

Form 990-EZ (2009)

FORM 990-EZ

OTHER EXPENSES

STATEMENT 1

DESCRIPTION	AMOUNT
UTILITIES & TELEPHONE	50,136.
INSURANCE	22,360.
OFFICE & DEGREE SUPPLIES	9,891.
RESALE ITEMS	215.
PRINTING & REPRO	10,334.
REUNION & DINNER EXPENSE	8,803.
OUTSIDE SERVICES	2,807.
PENSIONS	9,477.
SCHOLARSHIPS	4,200.
SUPREME COUNCIL	19,584.
EMPLOYEE TRAINING	158.
SECURITY ALARM MONITORING	2,491.
FEES-DOCENTS	5,416.
LAUNDRY	731.
TRAVEL	4,037.
FEES	1,428.
TAXES	10.
PAYROLL TAXES	7,517.
DEMOLAY & FRATERNAL	1,226.
 TOTAL TO FORM 990-EZ, LINE 16	 160,821.

FORM 990-EZ

OTHER ASSETS

STATEMENT 2

DESCRIPTION	BEG. OF YEAR	END OF YEAR
STOCK AND INVESTMENTS	422,857.	334,385.
ACCOUNTS RECEIVABLE	5,048.	5,048.
INVENTORIES	18,526.	18,526.
OTHER DEPRECIABLE ASSETS	12,313.	10,678.
 TOTAL TO FORM 990-EZ, LINE 24	 458,744.	 368,637.

FORM 990-EZ

OTHER LIABILITIES

STATEMENT 3

DESCRIPTION	BEG. OF YEAR	END OF YEAR
ALMONER'S FUND	10,871.	538.
DUE TO PRESERVATION FOUNDATION	5,447.	3,361.
DUE TO ENDMNT & MBRSHIP FUND	17,203.	13,320.
ACCOUNTS PAYABLE AND ACCRUED EXPENSES	7,498.	8,494.
 TOTAL TO FORM 990-EZ, LINE 26	 41,019.	 25,713.

FORM 990-EZ

OTHER REVENUE

STATEMENT 4

DESCRIPTION	AMOUNT
MERRILL LYNCH	6,971.
MERRILL LYNCH	11,631.
TOTAL TO FORM 990-EZ, LINE 8	18,602.

FORM 990-EZ      GAIN (LOSS) FROM PUBLICLY TRADED SECURITIES      STATEMENT 5

DESCRIPTION	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	NET GAIN OR (LOSS)
SECURITIES & CS'S	145,252.	152,552.	0.	-7,300.
SECURITIES & CD'S	2,625.	1,996.	0.	629.
TO FORM 990-EZ, LINE 5	147,877.	154,548.	0.	-6,671.

FORM 990-EZ      OCCUPANCY, RENT, UTILITIES AND MAINTENANCE      STATEMENT 6

DESCRIPTION	AMOUNT
DEPRECIATION	2,246.
OTHER EXPENSES	5,142.
TOTAL TO FORM 990-EZ, LINE 14	7,388.

FORM 990-EZ      RENTAL INCOME      STATEMENT 7

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
TEMPLE - SANTA FE, NM	1	85,781.
TOTAL INCLUDED ON FORM 990-EZ, PART I, LINE 4		85,781.

**FORM 990-EZ**

INFORMATION REGARDING TRANSFERS  
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

**STATEMENT** 8

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

TO SERVE AS AN EDUCATIONAL AND FRATERNAL ORGANIZATION