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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 \$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.

OMB No 1545-1150

2009**Open to Public Inspection****A** For the 2009 calendar year, or tax year beginning **January 1**, 2009, and ending **December 31**, 20 **09****B** Check if applicable:

- ☐ Address change
☐ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

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

C Name of organization

Historical Society of New Mexico

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

P. O. Box 1912

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

Santa Fe, NM 8550

D Employer identification number

85-6011525

E Telephone number

505-672-9201

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: ► hsnm.org**J** Tax-exempt status (check only one) — ☒ 501(c) (3) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**H** Check ► ☒ if the organization is not 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 ► \$**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	4815
	2	Program service revenue including government fees and contracts	2	0.0
	3	Membership dues and assessments	3	13183
	4	Investment income	4	13764
	5a	Gross amount from sale of assets other than inventory	5a	5577
	5b	Less: cost or other basis and sales expenses	5b	(5523)
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	54
	6	Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ► ☐		
	6a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a	21435
	6b	Less: direct expenses other than fundraising expenses	6b	(17589)
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	3846	
7a	Gross sales of inventory, less returns and allowances	7a	363	
7b	Less: cost of goods sold	7b	0	
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	363	
8	Other revenue (describe ► Canceled checks & Book royalty)	8	98	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	36123	
Expenses	10	Grants and similar amounts paid (attach schedule)	10	(6525)
	11	Benefits paid to or for members	11	0.0
	12	Salaries, other compensation, and employee benefits	12	0.0
	13	Professional fees and other payments to independent contractors	13	0.0
	14	Occupancy, rent, utilities, and maintenance	14	0.0
	15	Printing, publications, postage, and shipping	15	(5719)
	16	Other expenses (describe ► Office, Board Meeting expense, Web site support, insurance)	16	(4462)
	17	Total expenses. Add lines 10 through 16	17	(16706)
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	19417
	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	56809
	20	Other changes in net assets or fund balances (attach explanation)	20	0.0
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	76226

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OGDEN, UT**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	56809	76226
23 Land and buildings	0.0	0.0
24 Other assets (describe ►)	0.0	0.0
25 Total assets	56809	76226
26 Total liabilities (describe ►)		
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	56809	76226

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

Cat. No 106421

Form **990-EZ** (2009)

SCANNED JUL 22 2010

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Part III Statement of Program Service Accomplishments (See the instructions for Part III.)

What is the organization's primary exempt purpose? **Education, scholarly research, local society support**
 Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

Expenses
 (Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others.)

28	An annual conference attended by 150 - 200 participants with research and local history papers presented by members and other researchers. A Symposium honoring the 150th Anniversary of the founding of the Society was also held. A one day retreat for for Board Members to plan the upcoming years activities (Grants \$ <u>1800</u>) If this amount includes foreign grants, check here ☐	28a	(\$17,689)
29	Grants are made to local history groups and museums to support their programs, A Speaker's Bureau provides scholars for lectures to local group. Scholarships are provided to students and to teachers. These programs reach about 250 people each year. (Grants \$) If this amount includes foreign grants, check here ☐	29a	(\$6525)
30	La Cronica de Nuevo Mexico is published four times a year and distributed to about 500 individuals, organizations, libraries, and museums. (Grants \$) If this amount includes foreign grants, check here ☐	30a	(\$5719)
31	Other program services (attach schedule) (Grants \$) If this amount includes foreign grants, check here ☐	31a	0.0
32	Total program service expenses (add lines 28a through 31a)	32	(\$29933)

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.)

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
Michael Stevenson 2302 Perilla Ct, Santa Fe, NM 87505	President 25 hr/wk	0	0	0
David L. Caffey P. O. Box 955, Clovis, NM 88102-0955	Vice-President 10hr/wk	0	0	0
Henrietta Christmas 106 Thanes Way, Corrales, NM 87048	Secretary 20 hr/wk	0	0	0
John B Ramsay 6 Erie Lane, Los Alamos, NM 87544	Treasurer 20 hr/wk	0	0	0
William B. Anderson P. O. Box 1583 , Deming, NM 88031-1583	Board Member 5hr/wk	0	0	0
Martha S. Anderson 4521 Paseo Azul, Las Cruces, NM 88011	Board Member 5 hr/wk	0	0	0
Don Bullis 3100 Ann Circle, Rio Rancho, NM 87124-1920	Board Member 5 hr/wk	0	0	0
Laurence Campbell 225 Rim Road, Los Alamos, NM 87544	Board Member 5 hr/wk	0	0	0
Kathy Flynn P. O. Box 602, Santa Fe, NM 87504-0602	Board Member 5 hr/wk	0	0	0
René Harris 4129 S. Meadow Rd # 2014, Santa Fe, NM 87507-2711	Board Member 5 hr/wk	0	0	0
Andrew Hernandez 605 S. Zinc, Deming, NM 88030-4170	Board Member 5 hr/wk	0	0	0
Kermit Hill 20 Hondo Lane, Santa Fe, NM 87506	Board Member 5 hr/wk	0	0	0
Enrique Lamadrid 301 Placitas, Albuquerque, NM 87107	Board Member 5 hr/wk	0	0	0
Carleen Lazzell 8515 Rio Grande Blvd, Albuquerque, NM 87114-1226	Board Member 5 hr/wk	0	0	0
David Myers 710 Valverde, Albuquerque, NM 87108	Board Member 5 hr/wk	0	0	0
Abe Peña 1808 Blue Spruce Dr, Grants, NM 87020-4207	Board Member 5 hr/wk	0	0	0
Calvin B. Smith 5317 Lovington Hwy, Hobbs, NM 88240	Board Member 5 hr/wk	0	0	0
Dennis Trujillo 613 Bryn Mawr, Albuquerque, NM 87106	Board Member 5 hr/wk	0	0	0

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

		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? 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 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?	35a	✓
b	If "Yes," has it filed a tax return on Form 990-T for this year?	35b	
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets 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 0.0		
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 outstanding at the end 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 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	40b	✓
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 ▶ 0.0		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶ 0.0		
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.	40e	✓
41	List the states with which a copy of this return is filed. ▶ New Mexico		
42a	The organization's books are in care of ▶ John B. Ramsay Telephone no. ▶ 505-672-9201 Located at ▶ 6 Erie Lane, Los Alamos, NM ZIP + 4 ▶ 87544-3811		
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 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 **46** ☐ **Yes** ☒ **No**
- 47** Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II **47** ☐ **Yes** ☒ **No**
- 48** Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E **48** ☐ **Yes** ☒ **No**
- 49a** Did the organization make any transfers to an exempt non-charitable related organization? **49a** ☐ **Yes** ☒ **No**
- b** If "Yes," was the related organization a section 527 organization? **49b** ☐ **Yes** ☒ **No**
- 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."

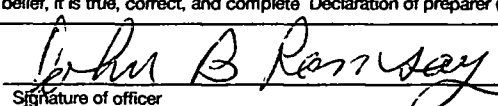
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
None				

f Total number of other employees paid over \$100,000 **0**

- 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."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
None		

d Total number of other independent contractors each receiving over \$100,000 **0**

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 June 20, 2010
	John B. Ramsay, Treasurer Type or print name and title	

Paid Preparer's Use Only	Preparer's signature	Date	Check if self-employed ☐	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**

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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(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 through 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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(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 ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	%
16a 33⅓% support test—2009. 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 ☐		
b 33⅓% support test—2008. 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 ☐		
17a 10%-facts-and-circumstances test—2009. 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 ☐		
b 10%-facts-and-circumstances test—2008. 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 ☐		
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 ► ☐		

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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	2500	10512	11820	18196	16198	59226
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	4876	15226	2643	12266	27066	62077
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 through 5	7376	25738	14463	30462	43264	121303
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	0	0	0	0	0	0
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year	0	0	0	0	0	0
c Add lines 7a and 7b	0	0	0	0	0	0
8 Public support. (Subtract line 7c from line 6.)						121303

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6	7376	25738	14463	30462	43264	121303
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	1069	1756	4620	2399	13764	23608
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	1069	1756	4620	2399	13764	23608
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.)	315	57	(1767)	(421)	54	(1762)
13 Total support. (Add lines 9, 10c, 11, and 12.)	8760	27551	17316	32440	57082	143149
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 2009 (line 8, column (f) divided by line 13, column (f))	15	85 %
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	92 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	16 %
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	10 %

- 19a 33⅓% support tests—2009.** 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—2008.** 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 ► ☐

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

Schedule A, Line 12: The Society handles subscription payments for the New Mexico Historical Review and El Palacio (published by the Museum of New Mexico). The Society also processes purchase orders for Bronze Plaques used to identify historic structures. A small profit is expected from these sales, but a backlog of orders and payments affects the apparent profit(loss) report.

Schedule A, Line 10a: Investment income is recieved from interest and dividends on reserve funds held by the Society.

GRANTS' & SCHOLARSHIPS PROVIDED BY THE HISTORICAL SOCIETY OF NEW MEXICO

NM Humanities Council	\$1000
Joby Patterson	\$500
Castillo-Wilson	\$500
Hess/Roberts	\$500
Wendy Horton	\$1000
Michelle Manino	\$300
Janice Jones	\$300
Jorge Ovalos	\$300
NM Historical Review	\$1000
Speaker's Bureau	\$1125
Total-	\$6525
Grants/Scholarships	