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Form **990-EZ****Short Form  
Return of Organization Exempt From Income Tax**

OMB No 1545-1150

**2009****Open to Public  
Inspection**Department of the Treasury  
Internal Revenue Service

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 \$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** 03/01, 2009, and ending 02/28/2010

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input checked="" type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>Please use IRS label or print or type. See Specific Instructions.</b>	<b>C Name of organization</b>		<b>D Employer identification number</b>
		DAUGHTERS OF THE AMERICAN REVOLUTION		23-7027687
		JERSEY BLUE CHAPTER		
		Number and street (or P O box, if mail is not delivered to street address)		Room/suite
		1 DOUGLAS FIR COURT		<b>E Telephone number</b>
		City or town, state or country, and ZIP + 4		(609) 452-0642
		PRINCETON, NJ 08540		<b>F Group Exemption Number</b> . . . ▶

• 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) ▶

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

**I Website:** ▶ WWW.DAR.ORG**J Tax-exempt status** (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 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** . . . ▶ \$ 291,040.**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I)

<b>Revenue</b>	1	Contributions, gifts, grants, and similar amounts received . . . . .	1	5,185.
	2	Program service revenue including government fees and contracts . . . . .	2	1,398.
	3	Membership dues and assessments . . . . .	3	8,341.
	4	Investment income . . . . .	4	19,032.
	5a	Gross amount from sale of assets other than inventory . . . . .	5a	256,252.
	5b	Less cost or other basis and sales expenses . . . . .	5b	282,112.
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .	5c	-25,860.
	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 \$ 825. of contributions reported on line 1) . . . . .	6a	832.
	6b	Less direct expenses other than fundraising expenses . . . . .	6b	832.
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a) . . . . .	6c		
<b>Expenses</b>	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) . . . . .	8	
	9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 . . . . .	9	8,096.
	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	0.
	13	Professional fees and other payments to independent contractors . . . . .	13	3,100.
	14	Occupancy, rent, utilities, and maintenance . . . . .	14	2,937.
<b>Net Assets</b>	15	Printing, publications, postage, and shipping . . . . .	15	718.
	16	Other expenses (describe) . . . . .	16	12,038.
	17	<b>Total expenses.</b> Add lines 10 through 16 . . . . .	17	18,793.
	18	Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .	18	-10,697.
	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	412,723.
	20	Other changes in net assets or fund balances (attach explanation) . . . . .	20	110,173.
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 . . . . .	21	512,199.

**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 . . . . .	412,293.	512,056.
23	Land and buildings . . . . .	430.	143.
24	Other assets (describe) . . . . .		
25	<b>Total assets</b> . . . . .	412,723.	512,199.
26	<b>Total liabilities</b> (describe) . . . . .		
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21) . . . . .	412,723.	512,199.

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

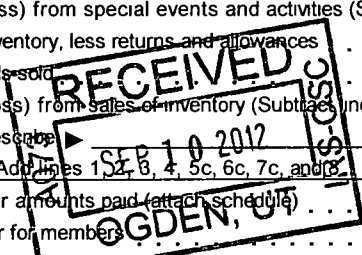
Form 990-EZ (2009)

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

	Yes	No
<b>33</b> Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity . . . . .	<b>33</b>	X
<b>34</b> Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes . . . . .	<b>34</b>	X
<b>35</b> 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		
<b>a</b> 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>35a</b>	X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<b>35b</b>	
<b>36</b> 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 . . . . .	<b>36</b>	X
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ <b>37a</b>		
<b>b</b> Did the organization file <b>Form 1120-POL</b> for this year? . . . . .	<b>37b</b>	X
<b>38a</b> 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>38a</b>	X
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . .	<b>38b</b>	
<b>39</b> Section 501(c)(7) organizations Enter		
<b>a</b> Initiation fees and capital contributions included on line 9 . . . . .	<b>39a</b>	
<b>b</b> Gross receipts, included on line 9, for public use of club facilities . . . . .	<b>39b</b>	
<b>40a</b> Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ . . . . ., section 4912 ▶ . . . . ., section 4955 ▶ . . . . .		
<b>b</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 . . . . .	<b>40b</b>	X
<b>c</b> 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 . . . . . ▶		
<b>d</b> Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization . . . . . ▶		
<b>e</b> 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 . . . . .	<b>40e</b>	X
<b>41</b> List the states with which a copy of this return is filed ▶ NJ,		
<b>42a</b> The organization's books are in care of ▶ MARJORIE FREEMAN Telephone no ▶ 732-968-2969		
Located at ▶ 71 BAYBERRY DR SOMERSET, NJ ZIP + 4 ▶ 08873		
<b>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)? . . . . .	<b>42b</b>	X
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> .		
<b>c</b> At any time during the calendar year, did the organization maintain an office outside of the U S ? . . . . .	<b>42c</b>	X
If "Yes," enter the name of the foreign country ▶		
<b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> - Check here. . . . . ▶ <input type="checkbox"/>		
and enter the amount of tax-exempt interest received or accrued during the tax year . . . . . ▶ <b>43</b>		
<b>44</b> Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ . . . . .	<b>44</b>	X
<b>45</b> 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 . . . . .	<b>45</b>	X

Form 990-EZ (2009)

**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 . . . . . **NONE**

- 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 receiving over \$100,000 . . . . . **NONE**

<b>Sign Here</b>	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.			
	<b>Signature of officer</b> <i>Susan G. Luczu</i> <b>Date</b> <i>9/5/12</i>			
	<b>Type or print name and title</b> <i>SUSAN G. Luczu - Regent Jersey Blue Chapter NSDAR</i>			
<b>Paid Preparer's Use Only</b>	<b>Preparer's signature</b> <i>Marie A. Delgado</i>	<b>Date</b> <i>8/23/12</i>	<b>Check if self-employed</b> <input type="checkbox"/>	<b>Preparer's identifying number (See instructions)</b> <i>P01360583</i>
	<b>Firm's name (or yours if self-employed), address, and ZIP + 4</b> <i>WITHUM SMITH + BROWN PC</i>		<b>EIN</b> <i>22-2027092</i>	
	<i>5 VAUGHN DR PRINCETON, NJ 08540-6313</i>		<b>Phone no</b> <i>609-520-1188</i>	

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

Form 990-EZ (2009)



**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") . . . . .	8,662	11,089	10,502	12,005	13,526	55,784
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 <b>Total.</b> Add lines 1 through 3. . . . .	8,662	11,089	10,502	12,005	13,526	55,784
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 <b>Public support.</b> Subtract line 5 from line 4 . . . . .						55,784

**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 . . . . .	8,662	11,089	10,502	12,005	13,526	55,784
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .	42,647	20,684	29,255	16,230	19,032	127,848
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) . . . . .	2,682	2,694	4,399	8,587	2,230	20,592
11 <b>Total support.</b> Add lines 7 through 10 . . . . .						204,224
12 Gross receipts from related activities, etc. (see instructions) . . . . .	12					7,474
13 <b>First five years.</b> 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 <b>stop here</b> . . . . .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f)) . . . . .	14	27.32 %
15 Public support percentage from 2008 Schedule A, Part II, line 14 . . . . .	15	25.46 %
16a <b>33 1/3% support test - 2009.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .	<input type="checkbox"/>	
b <b>33 1/3% support test - 2008.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .	<input type="checkbox"/>	
17a <b>10%-facts-and-circumstances test - 2009.</b> 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 <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .	<input checked="" type="checkbox"/>	
b <b>10%-facts-and-circumstances test - 2008.</b> 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 <b>stop here.</b> 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 <b>Private foundation.</b> 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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants") . . . . .	11,344	11,801	10,502	12,005	13,526	59,178
<b>2</b> 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 . . . . .			1,279	4,797	1,398	7,474
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
<b>6 Total.</b> Add lines 1 through 5 . . . . .	11,344	11,801	11,781	16,802	14,924	66,652
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .	0	0	0	0		0
<b>b</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
<b>c</b> Add lines 7a and 7b . . . . .	0	0	0	0		0
<b>8 Public support</b> (Subtract line 7c from line 6) . . . . .						66,652

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>9</b> Amounts from line 6 . . . . .	11,344	11,801	11,781	16,802	14,924	66,652
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .	42,647	20,684	29,255	16,230	19,032	127,848
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						
<b>c</b> Add lines 10a and 10b . . . . .	42,647	20,684	29,255	16,230	19,032	127,848
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) <u>ATCH 1</u> . . . . .		1,562	3,120	3,790	832	9,304
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12) . . . . .	53,991	34,047	44,156	36,822	34,788	203,804
<b>14 First five years.</b> 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 <b>stop here</b> . . . . . <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f)) . . . . .	<b>15</b>	32.70%
<b>16</b> Public support percentage from 2008 Schedule A, Part III, line 15 . . . . .	<b>16</b>	35.19%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	62.73%
<b>18</b> Investment income percentage from 2008 Schedule A, Part III, line 17 . . . . .	<b>18</b>	63.50%

**19a 33 1/3% support tests - 2009.** 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 - 2008.** 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 ☒



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

## SCHEDULE A, PART II- LINE 17A

THE ORGANIZATION MEETS THE "FACTS AND CIRCUMSTANCES" TEST IN REGULATIONS

SECTION 1.170A-9(F)(3) AS FOLLOWS:

- THE ORGANIZATION MAINTAINS A CONTINUOUS AND BONA FIDE PROGRAM FOR THE SOLICITATION OF FUNDS FROM THE GENERAL PUBLIC, COMMUNITY, MEMBERSHIP AND OTHER PUBLIC CHARITIES;
- SUPPORT IS RECEIVED FROM A BROAD BASE OF DONORS
- THE ORGANIZATION HAS A GOVERNING BODY WHICH REPRESENTS THE BROAD INTERESTS OF THE PUBLIC
- THE ORGANIZATION PROVIDES FACILITIES DIRECTLY FOR THE BENEFIT OF THE GENERAL PUBLIC ON A CONTINUING BASIS THROUGH IT'S OPERATION OF BUCCLEUCH MANSION, WHICH IS A REVOLUTIONARY HOME ON THE NATIONAL REGISTRY OF HISTORICAL PLACES. THE MANSION IS A PUBLIC MUSEUM WHICH HAS BEEN RESTORED AND MAINTAINED BY THE CHAPTER.
- THE ORGANIZATION ALSO PROVIDES SERVICES DIRECTLY FOR THE BENEFIT OF THE GENERAL PUBLIC ON A CONTINUING BASIS THROUGH PROGRAMS AND AWARDS FOR SCHOOL AGE CHILDREN RELATED TO PROMOTING KNOWLEDGE OF AMERICAN HISTORY.
- THE ORGANIZATION IS A MEMBERSHIP ORGANIZATION DESIGNED TO ENROLL PERSONS FROM THE COMMUNITY WITH DUES RATES BEING DESIGNED TO MAKE MEMBERSHIP AVAILABLE TO A BROAD CROSS-SECTION OF THE PUBLIC WITH THE ACTIVITIES OF THE ORGANIZATION CENTERED AROUND AMERICAN HISTORY AND HAVING APPEAL TO PERSONS HAVING A BROAD COMMON INTEREST.

ATTACHMENT 1

## SCHEDULE A, PART III - OTHER INCOME

DESCRIPTION	2005	2006	2007	2008	2009	TOTAL
OTHER INCOME		1,562	3,120.	3,790	832	9,304.
TOTAL		<u>1,562</u>	<u>3,120</u>	<u>3,790.</u>	<u>832</u>	<u>9,304</u>

**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.

PART II	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
PROGRAM SERVICE REVENUE	2,682	2,274	1,279	4,797	1,398
SPECIAL EVENTS INCOME	<u>0</u>	<u>420</u>	<u>3,120</u>	<u>3,790</u>	<u>832</u>
	2,682	2,694	4,399	8,587	2,230

ATTACHMENT 2

FORM 990EZ, PART I - INVESTMENT INCOME

DESCRIPTION

AMOUNT

DIVIDEND INCOME

12,218.

INTEREST INCOME

6,814.

TOTAL

19,032.

ATTACHMENT 3

FORM 990EZ, PART I - EXCLUDED CONTRIBUTIONS

<u>DESCRIPTION</u>	<u>AMOUNT</u>
FOOD & WINE EVENT	260.
REAL DAUGHTER	565.
TOTAL	<u>825.</u>

ATTACHMENT 4

FORM 990EZ, PART I - SPECIAL EVENTS AND ACTIVITIES

<u>DESCRIPTION</u>	<u>GROSS REVENUE</u>	<u>DIRECT EXPENSES</u>
FOOD & WINE EVENT	260.	260.
REAL DAUGHTER	572.	572.
TOTALS	<u>832.</u>	<u>832.</u>

ATTACHMENT 5FORM 990EZ, PART I - OTHER EXPENSES

CONFERENCES, CONVENTIONS	884.
DEPRECIATION	287.
AWARDS	1,834.
BANK/BROKER FEES	1,890.
APPLICATION	690.
DUES	3,723.
FEES	40.
MISCELLANEOUS	146.
DONATIONS	50.
INSURANCE	185.
PROGRAM EXPENSES	1,962.
YEARBOOK	347.
TOTAL	<u>12,038.</u>

FORM 990EZ, PART I - OTHER CHANGES IN FUND BALANCES

INCREASES IN FUND BALANCES

CHANGE IN UNREALIZED GAIN/LOSS ON INVEST

110,173.

TOTAL

110,173.

ATTACHMENT 7FORM 990EZ, PART II - CASH, SAVINGS AND INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING OF YEAR</u>	<u>END OF YEAR</u>
CASH	10,691.	14,870.
SAVINGS	82,085.	80,588.
INVESTMENTS - SECURITIES	135,119.	219,636.
INVESTMENTS - OTHER	184,398.	196,962.
TOTALS	<u>412,293.</u>	<u>512,056.</u>



FORM 990EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE

THE DAUGHTERS OF THE AMERICAN REVOLUTION-JERSY BLUE CHAPTER WAS  
CREATED TO RESTORE AND MAINTAIN BUCCLEUCH MANSION, A REVOLUTIONARY  
HOME ON THE NATIONAL REGISTRY OF HISTORICAL PLACES. THE MANSION IS  
OPEN TO THE PUBLIC FOR TOURS.

FORM 990EZ, PART III - STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTSATTACHMENT 9PROGRAM SERVICE ACCOMPLISHMENT 1

BUCCLEUCH MANSION IS A REVOLUTIONARY HOME ON THE NATIONAL  
REGISTRY OF HISTORICAL PLACES. THE MANSION IS A PUBLIC  
MUSEUM WHICH HAS BEEN RESTORED AND MAINTAINED BY THE  
CHAPTER.

# DAUGHTERS OF THE AMERICAN REVOLUTION

23-7027687

## FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

ATTACHMENT 10

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
MARJORIE FREEMAN 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	REGENT 5.00	0.	0.	0.
LINDA HUNTER 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	1ST VICE REGENT 5.00	0.	0.	0.
BARBARA PALLISTER 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	2ND VICE REGENT 5.00	0.	0.	0.
BEVERLY BRIGGS 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	CHAPLAIN 5.00	0.	0.	0.
BEVERLY WEBER 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	RECORDING SECRETARY 5.00	0.	0.	0.
KAREN STROEVER 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	CORR SECRETARY/ REGISTRAR 5.00	0.	0.	0.
DIANA SEIFERHELD 1 DOUGLAS FIR COURT	TREASURER 5.00	0.	0.	0.

ATTACHMENT 10

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# DAUGHTERS OF THE AMERICAN REVOLUTION

23-7027687

## FORM 990EZ, PART IV - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

## ATTACHMENT 10 (CONT'D)

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT. AND OTHER ALLOWANCES
PRINCETON, NJ 08540				
CHRISTINE METZING 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	HISTORIAN 5.00	0.	0.	0.
KRISTA FIERMAN 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	LIBRARIAN 5.00	0.	0.	0.
ELYSE BOUCHARD 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	DIRECTOR 5.00	0.	0.	0.
JUDY GENARO 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	BUCCLEUCH MANSION CURATOR 5.00	0.	0.	0.
MARY KWIETNIAK 1 DOUGLAS FIR COURT PRINCETON, NJ 08540	DIRECTOR 5.00	0.	0.	0.
GRAND TOTALS		0.	0.	0.

**SCHEDULE D**  
**(Form 1041)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

► **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

**2009**

Name of estate or trust **DAUGHTERS OF THE AMERICAN REVOLUTION  
JERSEY BLUE CHAPTER**

Employer identification number  
**23-7027687**

**Note:** Form 5227 filers need to complete **only** Parts I and II

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>1a</b>					

<b>b</b> Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	<b>1b</b>	
<b>2</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	<b>2</b>	
<b>3</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	<b>3</b>	
<b>4</b> Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	<b>4</b>	( )
<b>5</b> <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back	<b>5</b>	

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
<b>6a</b>					

<b>b</b> Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	<b>6b</b>	-25,860.
<b>7</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	<b>7</b>	
<b>8</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	<b>8</b>	
<b>9</b> Capital gain distributions	<b>9</b>	
<b>10</b> Gain from Form 4797, Part I	<b>10</b>	
<b>11</b> Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	<b>11</b>	( )
<b>12</b> <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back	<b>12</b>	-25,860.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

**Schedule D (Form 1041) 2009**

**Part III Summary of Parts I and II****Caution:** Read the instructions **before** completing this part.

		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
<b>13</b>	<b>Net short-term gain or (loss)</b> . . . . .	<b>13</b>		
<b>14</b>	<b>Net long-term gain or (loss):</b>			
a	Total for year . . . . .	<b>14a</b>		-25,860.
b	Unrecaptured section 1250 gain (see line 18 of the wrkst)	<b>14b</b>		
c	28% rate gain . . . . .	<b>14c</b>		
<b>15</b>	<b>Total net gain or (loss).</b> Combine lines 13 and 14a . . . . . ▶	<b>15</b>		-25,860.

**Note:** If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

**Part IV Capital Loss Limitation**

<b>16</b>	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the <b>smaller</b> of	<b>16</b>	( 3,000 )
a	The loss on line 15, column (3) or b \$3,000 . . . . .		

**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

**Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the worksheet on page 8 of the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

**Form 990-T trusts.** Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

<b>17</b>	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . . . .	<b>17</b>	
<b>18</b>	Enter the <b>smaller</b> of line 14a or 15 in column (2) but not less than zero . . . . .	<b>18</b>	
<b>19</b>	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . . . . .	<b>19</b>	
<b>20</b>	Add lines 18 and 19 . . . . .	<b>20</b>	
<b>21</b>	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- . . . . . ▶	<b>21</b>	
<b>22</b>	Subtract line 21 from line 20. If zero or less, enter -0- . . . . .	<b>22</b>	
<b>23</b>	Subtract line 22 from line 17. If zero or less, enter -0- . . . . .	<b>23</b>	
<b>24</b>	Enter the <b>smaller</b> of the amount on line 17 or \$2,300 . . . . .	<b>24</b>	
<b>25</b>	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> <b>Yes.</b> Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> <b>No.</b> Enter the amount from line 23 . . . . .	<b>25</b>	
<b>26</b>	Subtract line 25 from line 24 . . . . .	<b>26</b>	
<b>27</b>	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> <b>Yes.</b> Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> <b>No.</b> Enter the <b>smaller</b> of line 17 or line 22 . . . . .	<b>27</b>	
<b>28</b>	Enter the amount from line 26 (If line 26 is blank, enter -0-) . . . . .	<b>28</b>	
<b>29</b>	Subtract line 28 from line 27 . . . . .	<b>29</b>	
<b>30</b>	Multiply line 29 by 15% ( 15) . . . . .	<b>30</b>	
<b>31</b>	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .	<b>31</b>	
<b>32</b>	Add lines 30 and 31 . . . . .	<b>32</b>	
<b>33</b>	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .	<b>33</b>	
<b>34</b>	<b>Tax on all taxable income.</b> Enter the <b>smaller</b> of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) . . . . .	<b>34</b>	

Schedule D (Form 1041) 2009



Daughters for the American Revolution

Tax Year: 2009

Schedule O

Description of Amendments

Part I- Line 1, 2, 3, 6c, 8, 9, 16 and 17

Changes made to properly classify receipts for tax return purposes.

Line 1 was \$701, amended to \$5,185

Line 2 was \$4,693, amended to \$1,398

Line 3 was \$6,750, amended to \$8,341

Line 6c was \$1,597, amended to \$0

Line 8 was \$1,460, amended to \$0

Line 9 was \$8,373, amended to \$8,096

Line 16 was \$12,315, amended to \$12,038

Line 17 was \$19,070, amended to \$18,793