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2009

Open to Public Inspection

Form 990-EZ

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)

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.

Department of the Treasury Internal Revenue Service

A For the 2009 calendar year, or tax year beginning APRIL 1, 2009, and ending March 31, 2010

- 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: ROBERTSON ASSOCIATION, INC. Number and street (or P.O. box, if mail is not delivered to street address): 3008 SPENCERVILLE RD. City or town, state or country, and ZIP + 4: BURTOWSVILLE, MD 20866-1514

D Employer identification number: 55-0583510 E Telephone number: 301-421-9372 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: [X] Cash [ ] Accrual Other (specify) >

I Website: >

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

J Tax-exempt status (check only one) - [X] 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 > \$

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

Table with 21 rows for Revenue, Expenses, and Net Assets. Revenue total: 52,391. Expenses total: 33,780. Net Assets total: 291,179.

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.)

Table with 7 rows for Balance Sheets. Total assets: 291,179. Total liabilities: 0. Net assets or fund balances: 291,179.

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**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 . . . . .		X
34	Were any changes made to the organizing or governing documents? 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 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? . . . . .		X
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .		X
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 . . . . .		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ <b>37a</b> _____		
b	Did the organization file <b>Form 1120-POL</b> 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 outstanding at the end of the period covered by this return? . . . . .		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . . <b>38b</b> _____		
39	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on line 9 . . . . . <b>39a</b> _____		
b	Gross receipts, included on line 9, for public use of club facilities . . . . . <b>39b</b> _____		
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 . . . . .		X
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 . . . . . ▶ _____		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization . . . . . ▶ _____		
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. ▶ _____		
42a	The organization's books are in care of ▶ <u>M. Bony CHUTE</u> Telephone no. ▶ <u>301-421-9372</u> Located at ▶ <u>3008 SPENCERVILLE RD BERTHOUSVILLE MD</u> ZIP + 4 ▶ <u>20866-1514</u>		
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 <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts</b> .		
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.? . . . . .		X
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 . . . . .		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 . . . . .		X





**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
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>4 Total.</b> Add lines 1 through 3						
<b>5</b> 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)						
<b>6 Public support.</b> 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
<b>7</b> Amounts from line 4						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
<b>11 Total support.</b> Add lines 7 through 10						
<b>12</b> Gross receipts from related activities, etc. (see instructions)					<b>12</b>	
<b>13 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>14</b> Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	<b>14</b>	%
<b>15</b> Public support percentage from 2008 Schedule A, Part II, line 14	<b>15</b>	%
<b>16a 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"/>		
<b>17a 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 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"/>		
<b>18 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
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	60391	21378	5210	2035	24098	59112
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	64432	62752	86581	86332	81786	381883
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 through 5	70823	84122	91791	88367	105884	440987
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 \$5,000 or 1% of the amount on line 13 for the year	-					
c Add lines 7a and 7b	70823	84122	91791	88367	105884	440987
8 Public support (Subtract line 7c from line 6.)						0

**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	70823	84122	91791	88367	105884	440987
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	2424	3115	7017	2035	6947	21538
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975	-	-	-	-		
c Add lines 10a and 10b	2424	3115	7017	2035	6947	21538
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.)	73247	87237	98808	90402	112831	462525
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 <input type="checkbox"/>						

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

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	0	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	0	%

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

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	2.7	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	3.7	%

- 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



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## TRA BOARD & OFFICERS

### **President**

Kelley Deem  
415 Persimmon Pear Lane  
Harper's Ferry, WV 25425  
(304) 725-9812 home  
(304) 366-1810 work  
(304) 216-9818 cell  
[kdeem@frontiernet.net](mailto:kdeem@frontiernet.net)

### **Administrative Vice President**

Tim Brown  
57055 Marietta Road  
Byesville, OH 43723  
(740) 685-2594 office  
(740) 680-4646 cell  
[tim@timcoinc.net](mailto:tim@timcoinc.net)

### **Operations Vice President**

Andrew "AJ" Goslin  
185 Lakewood Drive  
Avon Lake, OH 44012  
(440) 670-7709  
[ajgoslin@centurytel.net](mailto:ajgoslin@centurytel.net)

### **Treasurer**

Barry Chute  
3008 Spencerville Road  
Burtonsville, MD 20866  
(301) 421-9372 home  
(301) 504-8781 work  
[barry@wvcaver.org](mailto:barry@wvcaver.org)

### **Membership Secretary**

Scott Baker  
5470 Logan-Thornville Rd. NE  
Rushville, OH 43150  
(740) 536-7074  
[smcavin@sbcglobal.net](mailto:smcavin@sbcglobal.net)

### **Recording Secretary**

Lor Windle  
101 Big Rock Road  
Morgantown, WV 26508  
(304) 594-2318 home  
[lorwindle@gmail.com](mailto:lorwindle@gmail.com)

## TRUSTEES

Bill Bradwell  
103 Parrish Road  
Aliquippa, PA 15001  
(724) 857-1037 home  
(412)-812-5517 cell  
[msmith6023@aol.com](mailto:msmith6023@aol.com)

Sharon Brinkman-Windle  
101 Big Rock Road  
Morgantown, WV 26508  
(304) 594-2318 home  
(304) 293-6285 work  
[sharon.brnkmanwindle@gmail.com](mailto:sharon.brnkmanwindle@gmail.com)

Marshall Fausold  
10032 Renfrew Road  
Silver Spring, MD 20901  
(301) 593-6385 home  
[fossil@verizon.net](mailto:fossil@verizon.net)

Jim Forsythe  
4786 Estes Dr.  
Kent, OH 44240-7220  
(330) 673-7638  
[jgi@neo.rr.com](mailto:jgi@neo.rr.com)

Ray Garton  
PO Box 200  
Barrackville, WV 26559  
(304) 366-6035 home  
(304) 366-1810 work  
(304) 366-8019 fax  
[garton@mammoth-geo.com](mailto:garton@mammoth-geo.com)

John C. "Chuck" Hempel  
PO Box 47  
Dailey, WV 26259  
(304) 338-6920 home  
[johncave@aol.com](mailto:johncave@aol.com)

Chris Kramer-Hamage  
Mud Puddle Gulch  
1111 Shaker Woods Road  
Herndon, VA 20170-2481  
(703) 430-0456 home  
(703) 786-8894 message  
[harnynfang@yahoo.com](mailto:harnynfang@yahoo.com)

Lizette Molina  
415 Persimmon Pear Lane  
Harper's Ferry, WV 25425  
(304) 725-9812 home  
(202) 663-4446 work  
(202) 329-4227 cell  
[batgirlie@frontiernet.net](mailto:batgirlie@frontiernet.net)

Jerry Nettles  
2060 Bloomery Road  
Charles Town, WV 25414  
(304) 725-7991  
[jdn Nettles@juno.com](mailto:jdn Nettles@juno.com)

Mike Oatney  
P. O. Box 231  
Sugar Grove, OH 43155  
(740) 746-8337  
[moatney@columbus.rr.com](mailto:moatney@columbus.rr.com)

Vic Ward  
528 Mill Street  
La Vale, MD 21502  
(301) 777-1499 home  
[britbat@atlanticcbb.net](mailto:britbat@atlanticcbb.net)  
[britbat1@mac.com](mailto:britbat1@mac.com)

Tom Williams  
7096 Leewood Forest Drive  
Springfield, VA 22151  
(703) 941-6115 home  
(703) 314-1426 cell  
[tom@bikewine.com](mailto:tom@bikewine.com)

## ELECTED TRUSTEES

Rich Geisler  
11501 Greenwood Rd.  
Glen Allen, VA 23059  
(804) 261-1214  
(804) 935-2225 work  
(804) 426-4755 cell  
[richg@chemtreat.com](mailto:richg@chemtreat.com)  
{2<sup>nd</sup> term, expires 2011}

Carol Jackson  
4784 Silver Lake Dr.  
Evans, GA 30809  
(706) 863-7019 home  
(706) 840-2626 cell  
[olebat@gmail.com](mailto:olebat@gmail.com)  
{1<sup>st</sup> term, expires 2010}

Barry Welling  
232 E 10<sup>th</sup> St.  
Indianapolis, IN 46202  
(317) 727-6237  
[nspcavet464@hotmail.com](mailto:nspcavet464@hotmail.com)  
{1<sup>st</sup> term, expires 2010}

Charlie Williams  
21118 Deep Furrow Ct.  
Ashburn, VA 20147  
(703) 724-1433  
[cwilliams@ashburn-online.com](mailto:cwilliams@ashburn-online.com)  
{1<sup>st</sup> term, expires 2011}