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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)

2009

Department of the Treasury
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

Open to Public Inspection

For the 2009 calendar year, or tax year beginning 7/01, 2009, and ending 6/30, 2010

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending		C Please use IRS label or print or type. See specific instructions. Society for the Increase of the Ministry 924 Farmington Avenue # 100 West Hartford, CT 06107		D Employer identification number 06-6053077	
		E Telephone number (860) 233-1732		G Gross receipts \$ 1,094,994.	
F Name and address of principal officer. Same As C Above		H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all affiliates included? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'No,' attach a list (see instructions)			
I Tax-exempt status <input checked="" type="checkbox"/> 501(c) (3) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		J Website: ▶ www.simministry.org		H(c) Group exemption number ▶	
K Form of organization <input type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input checked="" type="checkbox"/> Other ▶		L Year of formation. 1857		M State of legal domicile CT	

Part III Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: <u>The Society for the Increase of the Ministry (hereinafter "SIM") is organized as a not-for-profit public foundation. SIM works closely with the Episcopal seminaries and other education and training programs, as well as with all bishops and commissions on ministry of the</u>		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	18
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	18
	5 Total number of employees (Part V, line 2a)	5	4
	6 Total number of volunteers (estimate if necessary)	6	25
Revenue	7a Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	0.
	b Net unrelated business taxable income from Form 990-T, line 34	7b	0.
	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	434,920.	499,797.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	12,093.	-17,305.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	7,458.	7,100.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	454,471.	489,592.
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	220,120.	208,100.
	14 Benefits paid to or for members (Part IX, column (A), line 4)		
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	315,265.	220,089.
Expenses	16a Professional fundraising fees (Part IX, column (A), line 11e)		
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 84,641.		
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f, 24d)	130,007.	153,641.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	665,392.	581,830.
	19 Revenue less expenses. Subtract line 18 from line 12	-210,921.	-92,238.
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Year	End of Year
	21 Total liabilities (Part X, line 26)	3,254,554.	3,688,530.
	22 Net assets or fund balances. Subtract line 21 from line 20	6,732.	7,201.
		3,247,822.	3,681,329.

Part IV Signature Block

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: <u>Thomas Moore III</u> Date: <u>12/1/2011</u> Thomas Moore III Type or print name and title Executive Direc	

Paid Preparer's Use Only	Preparer's signature: <u>[Signature]</u> CPA	Date: <u>1/18/11</u>	Check if self-employed: <input type="checkbox"/>	Preparer's identifying number (see instructions): P00971497
	Firm's name (or yours if self-employed): <u>KIRCALDIE, RANDALL & MCNAB LLC</u>		EIN: <u>06-0415530</u>	
	Address: <u>81 Wolcott Hill Road</u> Wethersfield, CT 06109		Phone no.: <u>(860) 529-3366</u>	

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

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

TEEA0113L 12/29/09 Form 990 (2009)

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SCANNED FEB 28 2011

Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission:

See Schedule O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If 'Yes,' describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 348,230. including grants of \$) (Revenue \$)Scholarships: Grants to seminarians. The Foundation's charitable purpose is to grant scholarships to seminary students. Seventy-six seminarians received grants totaling \$208,100 and other related expenses of \$140,130.4b (Code:) (Expenses \$ 32,474. including grants of \$) (Revenue \$)Advocacy: Supporting seminarians in the councils of the Church.4c (Code:) (Expenses \$ 29,764. including grants of \$) (Revenue \$)Pastoral: Daily prayers and semi-annual visits and consultations with SIM grant recipients.

4d Other program services. (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)4e Total program service expenses 410,468.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 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		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II		X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If 'Yes,' complete Schedule C, Part III		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If 'Yes,' complete Schedule D, Part V		X
11 Is the organization's answer to any of the following questions 'Yes'? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable	X	
• Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI		
• Did the organization report an amount for investments— other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII		
• Did the organization report an amount for investments— program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		
• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX		
• Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X		
• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If 'Yes,' complete Schedule D, Part X		
12 Did the organization obtain separate, independent audited financial statement for the tax year? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII	X	
12A Was the organization included in consolidated, independent audited financial statement for the tax year? If 'Yes,' completing Schedule D, Parts XI, XII, and XIII is optional	X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If 'Yes,' complete Schedule F, Part I		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Part II		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Part III		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20 Did the organization operate one or more hospitals? If 'Yes,' complete Schedule H		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? If 'Yes,' complete Schedule I, Parts I and II		X
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? If 'Yes,' complete Schedule I, Parts I and III.	X	
23 Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If 'Yes,' complete Schedule J		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If 'Yes,' complete Schedule L, Part I.		X
b Is the organization 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
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If 'Yes,' complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? If 'Yes,' complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? If 'Yes,' complete Schedule L, Part IV		X
b A family member of a current or former officer, director, trustee, or key employee? If 'Yes,' complete Schedule L, Part IV		X
c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? If 'Yes,' complete Schedule L, Part IV.		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If 'Yes,' complete Schedule M		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If 'Yes,' complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If 'Yes,' complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If 'Yes,' complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If 'Yes,' complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' complete Schedule R, Part V, line 2.		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If 'Yes,' complete Schedule R, Part V, line 2		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If 'Yes,' complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O		X

BAA

Form 990 (2009)

Part IV Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1 a	Enter the number reported in Box 3 of form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable	1	
1 b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	0	
1 c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
2 a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	4	
2 b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	X	
3 a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3 b	If 'Yes' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.		
4 a	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)?		X
4 b	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.		
5 a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5 b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5 c	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6 a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X ^p
6 b	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7 a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7 b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided?		
7 c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7 d	If 'Yes,' indicate the number of Forms 8282 filed during the year		
7 e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7 f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7 g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
7 h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
9 a	Did the organization make any taxable distributions under section 4966?		
9 b	Did the organization make any distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
10 a	Initiation fees and capital contributions included on Part VIII, line 12.		
10 b	Gross Receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11	Section 501(c)(12) organizations. Enter:		
11 a	Gross income from other members or shareholders		
11 b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12 a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12 b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.		

Part VII Governance, Management and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body	1a	18
b Enter the number of voting members that are independent	1b	18
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a material diversion of the organization's assets?	5	X
6 Does the organization have members or stockholders?	6	X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	X
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a	X
b Each committee with authority to act on behalf of the governing body?	8b	X
9 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O.	9	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Does the organization have local chapters, branches, or affiliates?	10a	X
b If 'Yes,' does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	10b	
11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11	X
11A Describe in Schedule O the process, if any, used by the organization to review this Form 990. See Schedule O		
12a Does the organization have a written conflict of interest policy? If 'No,' go to line 13	12a	X
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this is done	12c	X
13 Does the organization have a written whistleblower policy?	13	X
14 Does the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official	15a	X
b Other officers of key employees of the organization	15b	X
If 'Yes' to line 15a or 15b, describe the process in Schedule O. (See instructions.)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If 'Yes,' has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosures

17 List the states with which a copy of this Form 990 is required to be filed ▶ None

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public See Schedule O

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization:

▶ Joseph Batkiewicz 924 Farmington Avenue West Hartford CT 06107 (860) 233-1732

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1 a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees. See instructions for definition of 'key employees.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if the organization did not compensate any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
Dr. Marnie Mueller Director	2	X						0.	0.	0.
The Rev. Salin Low Treasurer	2	X						0.	0.	0.
Winthrop W Goodwin Secretary	2	X						0.	0.	0.
Judith C Radasch Vice Chair	2	X						0.	0.	0.
The Rev. John L. C. Mitman Ex Chf Develop	40	X						58,267.	0.	0.
Richard Wenner Asst. Treasurer	2	X						0.	0.	0.
The Rev Dr Richard F Tomba Chairman	2	X						0.	0.	0.
The Rev Amy Fallon Ex-Schol Chair	2	X						0.	0.	0.
The Very Rev Martha J Horn Director	2	X						0.	0.	0.
Rev Canon Charles K Robert Director	2	X						0.	0.	0.
The Rev James B Lemler Director	2	X						0.	0.	0.
The Rev Ernestine C Flemis Director	2	X						0.	0.	0.
Ms Joyce Phillips Austin Director	2	X						0.	0.	0.
Margherita Cunningham Director	2	X						0.	0.	0.
The Rev Canon Angela S Ifi Director	2	X						0.	0.	0.
Mrs Katherine B Metcalf Director	2	X						0.	0.	0.
Mr William Dunakin Director	2	X						0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (cont.)

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
The Rt Rev Keith Whitmore Director	2	X						0.	0.	0.
Rev David Cobb Schlrshp Chair	2	X						0.	0.	0.
Thomas Moore III Executive Direc	40			X				125,000.	0.	0.
1b Total								183,267.	0.	0.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **1**

3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If 'Yes,' complete Schedule J for such individual.

	Yes	No
3		X
4		X
5		X

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If 'Yes' complete Schedule J for such individual.

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If 'Yes,' complete Schedule J for such person.

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of Services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **0**

Part VIII Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS	1 a Federated campaigns	1 a				
	b Membership dues	1 b				
	c Fundraising events	1 c				
	d Related organizations	1 d				
	e Government grants (contributions)	1 e				
	f All other contributions, gifts, grants, and similar amounts not included above	1 f 499,797.				
	g Noncash contribns included in lns 1a-1f:	\$				
	h Total. Add lines 1a-1f.		499,797.			
PROGRAM SERVICE REVENUE	Business Code					
	2 a					
	b					
	c					
	d					
	e					
	f All other program service revenue.					
g Total. Add lines 2a-2f.						
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts)		105,105.			105,105.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6 a Gross Rents	(i) Real (ii) Personal				
	b Less: rental expenses					
	c Rental income or (loss)					
	d Net rental income or (loss)					
	7 a Gross amount from sales of assets other than inventory	(i) Securities (ii) Other	482,992.			
	b Less: cost or other basis and sales expenses		605,402.			
	c Gain or (loss)		-122,410.			
	d Net gain or (loss)		-122,410.	-122,410.		
	8 a Gross income from fundraising events (not including: \$ _____ of contributions reported on line 1c). See Part IV, line 18	a				
	b Less: direct expenses	b				
	c Net income or (loss) from fundraising events					
	9 a Gross income from gaming activities. See Part IV, line 19	a				
	b Less: direct expenses	b				
	c Net income or (loss) from gaming activities					
	10 a Gross sales of inventory, less returns and allowances	a				
	b Less: cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code				
11 a Sarah Pardee Trust		7,100.	7,100.			
b						
c						
d All other revenue						
e Total. Add lines 11a-11d		7,100.				
12 Total revenue. See instructions		489,592.	-115,310.	0.	105,105.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22	208,100.	208,100.		
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	125,000.	62,500.	25,000.	37,500.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1) and persons described in section 4958(c)(3)(B))	0.	0.	0.	0.
7 Other salaries and wages	42,401.	29,678.	11,193.	1,530.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	14,005.	7,455.	3,277.	3,273.
9 Other employee benefits	27,027.	14,387.	6,324.	6,316.
10 Payroll taxes	11,656.	6,205.	2,727.	2,724.
11 Fees for services (non-employees)				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Prof fundraising svcs. See Part IV, ln 17				
f Investment management fees	14,977.	7,945.	4,056.	2,976.
g Other	55,492.	26,034.	16,560.	12,898.
12 Advertising and promotion				
13 Office expenses	3,399.	1,809.	796.	794.
14 Information technology				
15 Royalties				
16 Occupancy	12,434.	6,619.	2,909.	2,906.
17 Travel	21,361.	11,370.	4,998.	4,993.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	6,642.	3,536.	1,554.	1,552.
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	1,912.	1,015.	518.	379.
23 Insurance	3,920.	2,087.	917.	916.
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a Communication & marketing	19,274.	14,153.	2,562.	2,559.
b Telephone	5,286.	2,814.	1,237.	1,235.
c Postage and Shipping	3,794.	2,019.	888.	887.
d Equipment rental & maintenance	3,146.	1,675.	736.	735.
e Printing and Publications	1,550.	825.	363.	362.
f All other expenses	454.	242.	106.	106.
25 Total functional expenses. Add lines 1 through 24f	581,830.	410,468.	86,721.	84,641.
26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

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Form 990 (2009)

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
ASSETS	1 Cash – non-interest-bearing ..		1	
	2 Savings and temporary cash investments ..	20,470.	2	65,344.
	3 Pledges and grants receivable, net.	132,290.	3	232,654.
	4 Accounts receivable, net.		4	
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L ..		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L ..		6	
	7 Notes and loans receivable, net ..		7	
	8 Inventories for sale or use ..		8	
	9 Prepaid expenses and deferred charges.	18,904.	9	17,453.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D ..	29,893.		
	b Less: accumulated depreciation.	28,536.	10c	1,357.
	11 Investments – publicly-traded securities.	3,079,621.	11	3,371,722.
	12 Investments – other securities. See Part IV, line 11 ..		12	
	13 Investments – program-related. See Part IV, line 11 ..		13	
	14 Intangible assets ..		14	
	15 Other assets. See Part IV, line 11.		15	
16 Total assets. Add lines 1 through 15 (must equal line 34).	3,254,554.	16	3,688,530.	
LIABILITIES	17 Accounts payable and accrued expenses.	6,732.	17	7,201.
	18 Grants payable ..		18	
	19 Deferred revenue ..		19	
	20 Tax-exempt bond liabilities ..		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D ..		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L ..		22	
	23 Secured mortgages and notes payable to unrelated third parties.		23	
	24 Unsecured notes and loans payable to unrelated third parties.		24	
	25 Other liabilities. Complete Part X of Schedule D ..		25	
	26 Total liabilities. Add lines 17 through 25 ..	6,732.	26	7,201.
NET ASSETS OR FUND BALANCES	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29 and lines 33 and 34.			
	27 Unrestricted net assets ..	3,098,659.	27	3,508,073.
	28 Temporarily restricted net assets ..	128,575.	28	152,668.
	29 Permanently restricted net assets.	20,588.	29	20,588.
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds.		30	
	31 Paid-in or capital surplus, or land, building, and equipment fund ..		31	
	32 Retained earnings, endowment, accumulated income, or other funds.		32	
	33 Total net assets or fund balances. ..	3,247,822.	33	3,681,329.
34 Total liabilities and net assets/fund balances. ..	3,254,554.	34	3,688,530.	

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Form 990 (2009)

Part XIII Financial Statements and Reporting1 Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other

If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.

2a Were the organization's financial statements compiled or reviewed by an independent accountant? ..

b Were the organization's financial statements audited by an independent accountant? ..

c If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? ..

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.

d If 'Yes' to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both: ..

☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? ..

b If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

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Form 990 (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 'unusual grants'.)						
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf						
3 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public 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.						<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	%
15 Public support percentage from 2008 Schedule A, Part II, line 14.	15	%
16a 33-1/3 support test – 2009. If the organization did not check the box on line 13, and the line 14 is 33-1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
b 33-1/3 support test – 2008. 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 stop here. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
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.	<input type="checkbox"/>	
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.	<input type="checkbox"/>	
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.	<input type="checkbox"/>	

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Schedule A (Form 990 or 990-EZ) 2009

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 yr 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 "unusual grants.")	312,481.	305,125.	200,138.	434,920.	499,797.	1,752,461.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt purpose						0.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						0.
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0.
5 The value of services or facilities furnished by a governmental unit to the organization without charge						0.
6 Total. Add lines 1 through 5	312,481.	305,125.	200,138.	434,920.	499,797.	1,752,461.
7a Amounts included on lines 1, 2, 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 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.)						1,752,461.

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6	312,481.	305,125.	200,138.	434,920.	499,797.	1,752,461.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	113,697.	120,933.	147,710.	149,589.	105,105.	637,034.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						0.
c Add lines 10a and 10b	113,697.	120,933.	147,710.	149,589.	105,105.	637,034.
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						0.
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) See Part IV.	9,581.	9,337.	8,870.	7,458.	7,100.	42,346.
13 Total support. (add lns 9, 10c, 11, and 12.)						2,431,841.
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	72.1 %
16 Public support percentage from 2008 Schedule A, Part III, line 15.	16	73.2 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	26.2 %
18 Investment income percentage from 2008 Schedule A, Part III, line 17.	18	24.9 %

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 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

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.

[illegible]

Society for the Increase of the Ministry

06-6053077

Part III, Line 12 - Other Income

Nature and Source	2009	2008	2007	2006	2005
Sarah Pardee Trust	7,100.	7,458.	8,870.	9,337.	9,581.
Total	<u>\$ 7,100.</u>	<u>\$ 7,458.</u>	<u>\$ 8,870.</u>	<u>\$ 9,337.</u>	<u>\$ 9,581.</u>

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

Society for the Increase of the Ministry

Supplemental Financial Statements

- Complete if the organization answered 'Yes' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11, or 12.
► Attach to Form 990. ► See separate instructions

OMB No 1545-0047

2009

Open to Public Inspection

Employer identification number

06-6053077

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or for any other purpose conferring impermissible private benefit?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Part II Conservation Easements Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or pleasure)	<input type="checkbox"/> Preservation of an historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ► _____

4 Number of states where property subject to conservation easement is located ► _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easement it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ► _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ► \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

- 1 a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items
- b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
- (i) Revenues included in Form 990, Part VIII, line 1 ► \$ _____
- (ii) Assets included in Form 990, Part X ► \$ _____
- 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:
- a Revenues included in Form 990, Part VIII, line 1 ► \$ _____
- b Assets included in Form 990, Part X ► \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition
 b ☐ Scholarly research
 c ☐ Preservation for future generations
 d ☐ Loan or exchange programs
 e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements Complete if organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If 'Yes,' explain the arrangement in Part XIV and complete the following table:

	Amount
c Beginning balance.....	1c
d Additions during the year	1d
e Distributions during the year.....	1e
f Ending balance.....	1f

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

b If 'Yes,' explain the arrangement in Part XIV.

Part V Endowment Funds Complete if organization answered 'Yes' to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net Investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ▶ _____ %
 b Permanent endowment ▶ _____ %
 c Term endowment ▶ _____ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i) unrelated organizations.....
 (ii) related organizations.....

	Yes	No
3a(i)		
3a(ii)		
3b		

b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIV the intended uses of the organization's endowment funds.

Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated Depreciation	(d) Book Value
1a Land.....				
b Buildings.....				
c Leasehold improvements				
d Equipment		25,520.	25,156.	364.
e Other		4,373.	3,380.	993.
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				1,357.

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Schedule D (Form 990) 2009

Part VII	Investments—Other Securities See Form 990, Part X, line 12.	N/A
-----------------	--	-----

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives		
Closely-held equity interests		
Other _____		

Total. (Column (b) must equal Form 990 Part X, col. (B) line 12.) ▶		

Part VIII	Investments—Program Related (See Form 990, Part X, line 13)	N/A
-----------	---	-----

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. (Column (b) must equal Form 990, Part X, Col. (B) line 13.)		

Part IX	Other Assets (See Form 990, Part X, line 15)	N/A
----------------	---	-----

[illegible]

Part X	Other Liabilities (See Form 990, Part X, line 25)
---------------	--

(a) Description of Liability	(b) Amount
Federal Income Taxes	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25) ▶	

2. FIN 48 Footnote. In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12).	489,592.
2	Total expenses (Form 990, Part IX, column (A), line 25)	581,830.
3	Excess or (deficit) for the year. Subtract line 2 from line 1	-92,238.
4	Net unrealized gains (losses) on investments.	
5	Donated services and use of facilities	
6	Investment expenses	
7	Prior period adjustments	
8	Other (Describe in Part XIV)	
9	Total adjustments (net). Add lines 4 through 8	
10	Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9	-92,238.

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	1,015,337.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	525,745.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	525,745.
3	Subtract line 2e from line 1	3	489,592.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	489,592.

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	581,830.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	581,830.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	581,830.

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Part XIV Supplemental Information (continued)

2009

Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 21 or 22.

► Attach to Form 990.

Employer identification number

06-6053077

Part II General Information on Grants and Assistance

- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. See Part TV**

Part II **Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed

[illegible]

- | | | | | | | | |
|----------|--|----|----|-------|-------|-------|---|
| 2 | Enter total number of section 501(c)(3) and government organizations | .. | . | . | ... | .. | 0 |
| 3 | Enter total number of other organizations | . | .. | | | | 0 |

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
Scholarship Grants	85	208,100.			
Part IV Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.					

Part I, Line 2 - Grantmaker's Description of How Grants are Used

Applications are sent to the seminaries and the Financial Aid Officer decides which students' needs are the greatest and gives out the applications. SIM gets applications back in March along with any backup showing the financial needs of the candidate.

Each member of the Scholarship Committee is given copies of the completed applications from an individual seminary and scholarship needs of the seminarians are reviewed by them. The committee then meets as a whole and each member gives his or her recommendations for the consideration of the entire committee. If a seminarian is awarded a scholarship, an award letter is issued to the student, the Seminary, the

Part I, Line 2 - Grantmaker's Description of How Grants are Used (continued)

sponsoring Diocese, and sponsoring parish.

Checks are cut and distributed either in person by the Director of Scholarships, or they are mailed directly to the student in October and March (one half of the grant each semester).

Scholarship records are maintained by SIM for at least ten years.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990.

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization

Society for the Increase of the Ministry

Employer identification number

06-6053077

Form 990 - Additional DBAs

SIM

Form 990, Part III, Line 1 - Organization Mission

The Society for the Increase of the Ministry (hereinafter "SIM") is organized as a not-for-profit public foundation. SIM works closely with the Episcopal seminaries and other education and training programs, as well as with all bishops and commissions on ministry of the sponsoring dioceses of SIM recipients. SIM maintains a close working relationship with offices of the Episcopal Church Center and with the Church Pension Group (CPG), providing financial counseling through CPG's Plan Ahead program.

SIM maintains an identity independent of seminaries, dioceses and national church bodies in order to keep a clear focus on meeting the needs of men and women entering Holy Orders in the Episcopal Church.

Form 990, Part VI, Line 11 - Form 990 Review Process

No review was or will be conducted.

Form 990, Part VI, Line 19 - Other Organization Documents Publicly Available

Upon request

Name of the organization

Society for the Increase of the Ministry

Employer identification number

06-6053077

02-4110-000	Scholarship Grants	Beginning Balance	0.00
3054	AP 9/16/2009 September 2009 Kevin Caruso		750.00
3055	AP 9/16/2009 September 2009 Beatrice Dwyer		750.00
3056	AP 9/16/2009 September 2009 Karl Griswold-Kuhn		750.00
3057	AP 9/16/2009 September 2009 Stephanie Johnson		1,750.00
3058	AP 9/16/2009 September 2009 Deborah Anne Noonan		1,750.00
3059	AP 9/16/2009 September 2009 Marie Tjoflat		750.00
3060	AP 9/16/2009 September 2009 Heather Wenrick		1,000.00
3061	AP 9/16/2009 September 2009 Stephanie R. Mitchell		2,000.00
3062	AP 9/16/2009 September 2009 Joyce Scheyer		1,000.00
3063	AP 9/16/2009 September 2009 Joyce M. Scheyer		2,000.00
3064	AP 9/16/2009 September 2009 Kathleen H. Berkowe		2,000.00
3065	AP 9/16/2009 September 2009 Edwin Chinery		1,750.00
3066	AP 9/16/2009 September 2009 Joseph Dirbas		1,250.00
3067	AP 9/16/2009 September 2009 Richard Galloway		1,750.00
3068	AP 9/16/2009 September 2009 Farrell D. Graves		1,750.00
3069	AP 9/16/2009 September 2009 Sahra M. Harding		1,500.00
3070	AP 9/16/2009 September 2009 Matthew Holcombe		1,750.00
3071	AP 9/16/2009 September 2009 Gabriel Lamazares		1,500.00
3072	AP 9/16/2009 September 2009 Shelley McDade		1,750.00
3073	AP 9/16/2009 September 2009 Gregory McIntyre		750.00
3074	AP 9/16/2009 September 2009 Anna Noon		1,000.00
3075	AP 9/16/2009 September 2009 Maria Chrisina Paglinauan		1,750.00
3076	AP 9/16/2009 September 2009 Terry Shields		1,000.00
3077	AP 9/16/2009 September 2009 Suzanne Toro		2,000.00

07/21/2010 11:50 AM

Page: 1

Reference	Journal Date	Month	Description	Debit	Credit
3078	AP 9/16/2009	September 2009	Elisabeth Tunney	1,500.00	
3079	AP 9/16/2009	September 2009	Daron Vroon	1,000.00	
3080	AP 9/16/2009	September 2009	Anne Witt	1,250.00	
3081	AP 9/23/2009	September 2009	Bryan O'Carroll	1,750.00	
3085	AP 10/1/2009	October 2009	Audrey Abt	500.00	
3086	AP 10/1/2009	October 2009	Joan Louise Grant	1,500.00	
3087	AP 10/1/2009	October 2009	Michael Wernick	500.00	
3088	AP 10/1/2009	October 2009	Kathym Macek	1,500.00	
3089	AP 10/1/2009	October 2009	Andrew T. Shamel	1,750.00	
3090	AP 10/1/2009	October 2009	Jonathan Sy	1,750.00	
3091	AP 10/1/2009	October 2009	Stephen Carson	1,250.00	
3092	AP 10/1/2009	October 2009	Robert Crow	1,250.00	
3093	AP 10/1/2009	October 2009	Alvin Crumpton IV	1,250.00	
3094	AP 10/1/2009	October 2009	Thomas DiMarco	750.00	
3095	AP 10/1/2009	October 2009	Harry Jenkins	1,250.00	
3096	AP 10/1/2009	October 2009	Jane Johnson	1,500.00	
3097	AP 10/1/2009	October 2009	Amanda Lippe	1,500.00	
3098	AP 10/1/2009	October 2009	Abigail Moon	1,000.00	
3099	AP 10/1/2009	October 2009	Alice Rutland	1,500.00	
3100	AP 10/1/2009	October 2009	Mary Wolfenbarger	1,250.00	
3101	AP 10/1/2009	October 2009	Angela M. Cortinas	1,750.00	
3102	AP 10/1/2009	October 2009	Isaias Ginson	1,500.00	
3103	AP 10/1/2009	October 2009	Deborah J. Hughes-Habel	750.00	
3104	AP 10/1/2009	October 2009	Stephen W. Kidd	1,750.00	
3105	AP 10/1/2009	October 2009	Andrew Lobban	1,750.00	
3106	AP 10/1/2009	October 2009	Kathleen Pfister	2,000.00	
3107	AP 10/1/2009	October 2009	Diane Pike	1,000.00	
3108	AP 10/1/2009	October 2009	Christina Robertson	500.00	
3109	AP 10/1/2009	October 2009	Martha M. Horn	500.00	
3110	AP 10/1/2009	October 2009	Hannah E. Mudge	1,000.00	
3111	AP 10/1/2009	October 2009	Craig M. Stephans	1,200.00	
3112	AP 10/1/2009	October 2009	Jordan Hylden	1,750.00	
3113	AP 10/1/2009	October 2009	James K. Lee	1,000.00	
3114	AP 10/1/2009	October 2009	Thomas P. H. Warren	1,000.00	
3115	AP 10/1/2009	October 2009	Martha Watson	500.00	
3119	AP 10/28/2009	October 2009	Michael Angell	1,400.00	
3120	AP 10/28/2009	October 2009	Kirsten Baer	887.50	
3121	AP 10/28/2009	October 2009	Timothy Baer	887.50	
3122	AP 10/28/2009	October 2009	Melissa Bruckart	1,000.00	
3123	AP 10/28/2009	October 2009	Peter Doddema	1,000.00	
3124	AP 10/28/2009	October 2009	Geoffrey D. Doolittle	1,200.00	
3125	AP 10/28/2009	October 2009	Heather Erickson	887.50	
3126	AP 10/28/2009	October 2009	David Erickson	887.50	
3127	AP 10/28/2009	October 2009	Geoffrey P. Evans	1,100.00	
3128	AP 10/28/2009	October 2009	Christine M. Faulstich	1,100.00	
3129	AP 10/28/2009	October 2009	Stephen D. Foisie	1,000.00	
3130	AP 10/28/2009	October 2009	Lisa Hoffman	750.00	
3131	AP 10/28/2009	October 2009	Jessica T. Knowles	1,250.00	
3132	AP 10/28/2009	October 2009	James J. Livingston	750.00	
3133	AP 10/28/2009	October 2009	Julia W. Messer	1,100.00	
3134	AP 10/28/2009	October 2009	Amy E. Porterfield	1,750.00	
3135	AP 10/28/2009	October 2009	Josiah Rengers	1,000.00	
3136	AP 10/28/2009	October 2009	Clay Riley	1,250.00	
3137	AP 10/28/2009	October 2009	Christopher M. Robinson	1,000.00	

SLM-The Society for the Increase of the Ministry
Account Activity, July 2009 - June 2010

07/21/2010 11:50 AM

Page: 1

Reference	Journal	Date	Month	Description	Debit	Credit
3138	AP	10/28/2009	October 2009	Patricia Sexton	750.00	
3139	AP	10/28/2009	October 2009	Benson E. Shelton	1,250.00	
3140	AP	10/28/2009	October 2009	Charles Smith	750.00	
3141	AP	10/28/2009	October 2009	Brian W. Turner	1,100.00	
3142	AP	10/28/2009	October 2009	Matthew A. Venuti	1,200.00	
3143	AP	10/28/2009	October 2009	Seth Walley	750.00	
3144	AP	10/28/2009	October 2009	Virginia Wilder	1,000.00	
3229	AP	1/13/2010	January 2010	Stephen Carson	1,250.00	
3230	AP	1/13/2010	January 2010	Robert Crow	1,250.00	
3231	AP	1/13/2010	January 2010	Alvin Crumpton IV	1,250.00	
3232	AP	1/13/2010	January 2010	Thomas DiMarco	750.00	
3233	AP	1/13/2010	January 2010	Harry Jenkins	1,250.00	
3234	AP	1/13/2010	January 2010	Jane Johnson	1,500.00	
3235	AP	1/13/2010	January 2010	Amanda Lippe	1,500.00	
3236	AP	1/13/2010	January 2010	Abigail Moon	1,000.00	
3237	AP	1/13/2010	January 2010	Alice Rutland	1,500.00	
3238	AP	1/13/2010	January 2010	Mary Wolfenbarger	1,250.00	
3243	AP	1/20/2010	January 2010	Kathleen H. Berkowe	2,000.00	
3244	AP	1/20/2010	January 2010	Edwin Chinery	1,750.00	
3245	AP	1/20/2010	January 2010	Joseph Dirbas	1,250.00	
3246	AP	1/20/2010	January 2010	Richard Galloway	1,750.00	
3247	AP	1/20/2010	January 2010	Farrell D. Graves	1,750.00	
3248	AP	1/20/2010	January 2010	Sahra M. Harding	1,500.00	
3249	AP	1/20/2010	January 2010	Matthew Holcombe	1,750.00	
3250	AP	1/20/2010	January 2010	Gabriel Lamazares	1,500.00	
3251	AP	1/20/2010	January 2010	Shelley McDade	1,750.00	
3252	AP	1/20/2010	January 2010	Gregory McIntyre	750.00	
3253	AP	1/20/2010	January 2010	Anna Noon	1,000.00	
3254	AP	1/20/2010	January 2010	Maria Cristina Paglinaua	1,750.00	
3255	AP	1/20/2010	January 2010	Terry Shields	1,000.00	
3256	AP	1/20/2010	January 2010	Suzanne Toro	2,000.00	
3257	AP	1/20/2010	January 2010	Elisabeth Tunney	1,500.00	
3258	AP	1/20/2010	January 2010	Daron Vroon	1,000.00	
3259	AP	1/20/2010	January 2010	Anne Witt	1,250.00	
3264	AP	2/1/2010	February 2010	Kevin Caruso	750.00	
3265	AP	2/1/2010	February 2010	Beatrice Dwyer	750.00	
3266	AP	2/1/2010	February 2010	Karl Griswold-Kuhn	750.00	
3267	AP	2/1/2010	February 2010	Stephanie Johnson	1,750.00	
3268	AP	2/1/2010	February 2010	Deborah Anne Noonan	1,750.00	
3269	AP	2/1/2010	February 2010	Marie Tjoflat	750.00	
3270	AP	2/1/2010	February 2010	Heather Wenrick	1,000.00	
3271	AP	2/1/2010	February 2010	Audrey Abt	500.00	
3272	AP	2/1/2010	February 2010	Michael Wernick	500.00	
3273	AP	2/1/2010	February 2010	Kathym Macek	1,500.00	
3274	AP	2/1/2010	February 2010	Andrew T. Shamel	1,750.00	
3275	AP	2/1/2010	February 2010	Stephanie R. Mitchell	2,000.00	
3276	AP	2/1/2010	February 2010	Joyce M. Scheyer	2,000.00	
3277	AP	2/1/2010	February 2010	Bryan O'Carroll	1,750.00	
3278	AP	2/1/2010	February 2010	Jonathan Sy	1,750.00	
3279	AP	2/1/2010	February 2010	Angela M. Cortinas	1,750.00	
3280	AP	2/1/2010	February 2010	Isaias Ginson	1,500.00	
3281	AP	2/1/2010	February 2010	Deborah J. Hughes-Habel	750.00	
3282	AP	2/1/2010	February 2010	Stephen W. Kidd	1,750.00	
3283	AP	2/1/2010	February 2010	Andrew Lobban	1,750.00	

07/21/2010 11:50 AM

Page:

Reference	Journal	Date	Month	Description	Debit	Cre
3284	AP	2/1/2010	February 2010	Kathleen Pfister	2,000.00	
3285	AP	2/1/2010	February 2010	Diane Pike	1,000.00	
3286	AP	2/1/2010	February 2010	Christina Robertson	500.00	
3287	AP	2/1/2010	February 2010	Martha M. Horn	500.00	
3288	AP	2/1/2010	February 2010	Hannah E. Mudge	1,000.00	
3289	AP	2/1/2010	February 2010	Jordan Hylden	1,750.00	
3290	AP	2/1/2010	February 2010	James K. Lee	1,000.00	
3291	AP	2/1/2010	February 2010	Thomas P. H. Warren	1,000.00	
3292	AP	2/1/2010	February 2010	Martha Watson	500.00	
3293	AP	2/1/2010	February 2010	Michael Angell	1,400.00	
3294	AP	2/1/2010	February 2010	Kirsten Baer	887.50	
3295	AP	2/1/2010	February 2010	Timothy Baer	887.50	
3296	AP	2/1/2010	February 2010	Melissa Bruckart	1,000.00	
3297	AP	2/1/2010	February 2010	Peter Doddema	1,000.00	
3298	AP	2/1/2010	February 2010	Geoffrey D. Doolittle	1,200.00	
3299	AP	2/1/2010	February 2010	Heather Erickson	887.50	
3300	AP	2/1/2010	February 2010	David Erickson	887.50	
3301	AP	2/1/2010	February 2010	Geoffrey P. Evans	1,100.00	
3302	AP	2/1/2010	February 2010	Christine M. Faulstich	1,100.00	
3303	AP	2/1/2010	February 2010	Stephen D. Folsie	1,000.00	
3304	AP	2/1/2010	February 2010	Lisa Hoffman	750.00	
3305	AP	2/1/2010	February 2010	Jessica T. Knowles	1,250.00	
3306	AP	2/1/2010	February 2010	James J. Livingston	750.00	
3307	AP	2/1/2010	February 2010	Julia W. Messer	1,100.00	
3308	AP	2/1/2010	February 2010	Amy E. Porterfield	1,750.00	
3309	AP	2/1/2010	February 2010	Josiah Rengers	1,000.00	
3310	AP	2/1/2010	February 2010	Clay Riley	1,250.00	
3311	AP	2/1/2010	February 2010	Christopher M. Robinson	1,000.00	
3312	AP	2/1/2010	February 2010	Patricia Sexton	750.00	
3313	AP	2/1/2010	February 2010	Benson E. Shelton	1,250.00	
3314	AP	2/1/2010	February 2010	Charles Smith	750.00	
3315	AP	2/1/2010	February 2010	Brian W. Turner	1,100.00	
3316	AP	2/1/2010	February 2010	Matthew A. Venuti	1,200.00	
3317	AP	2/1/2010	February 2010	Seth Walley	750.00	
3318	AP	2/1/2010	February 2010	Virginia Wilder	1,000.00	
3384	AP	5/26/2010	May 2010	Otis Gaddis III	2,900.00	
					Subtotal	208,100.00
Scholarship Grants					Current Balance	208,100.00

