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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. North Star Fund, Inc. 520 Eighth Avenue #2203 New York, NY 10018	D Employer Identification Number 13-2950801
		E Telephone number 212/620-9110	G Gross receipts \$ 6,762,909.
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		H(c) Group exemption number	
J Website: www.northstarfund.org			
K Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		L Year of Formation 1979	M State of legal domicile NY

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: <u>North Star Fund's mission is to support grassroots groups working for equality, economic justice and peace.</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)	14	
	4	Number of independent voting members of the governing body (Part VI, line 1b)	13	
	5	Total number of employees (Part V, line 2a)	11	
	6	Total number of volunteers (estimate if necessary)	10	
Revenue	7a	Total gross unrelated business revenue from Part VIII, column (C), line 12	0.	
	7b	Net unrelated business taxable income from Form 990-T, line 34	0.	
	8	Contributions and grants (Part VIII, line 1h)	3,179,717.	5,726,863.
	9	Program service revenue (Part VIII, line 2g)	18,082.	136,972.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	46,078.	38,286.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9e, 10c, and 11e)	-36,591.	359,916.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,207,286.	6,262,037.
	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	1,848,265.	1,989,441.
	14	Benefits paid to or for members (Part IX, column (A), line 4)		
	Expenses	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	440,581.
16a		Professional fundraising fees (Part IX, column (A), line 11e)		
b		Total fundraising expenses (Part IX, column (D), line 25)	232,602.	
17		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	491,422.	455,440.
18		Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)	2,780,268.	2,978,786.
Net Assets or Fund Balances	19	Revenue less expenses Subtract line 18 from line 12	427,018.	3,283,251.
	20	Total assets (Part X, line 16)	2,350,022.	5,869,579.
	21	Total liabilities (Part X, line 26)	87,734.	328,997.
	22	Net assets or fund balances Subtract line 21 from line 20	2,262,288.	5,540,582.

Part II Signature Block

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.	
	Signature of officer: <u>HUGH HOGAN</u> Type or print name and title: <u>HUGH HOGAN, EXECUTIVE DIRECTOR</u>	Date: <u>10/29/10</u>
Paid Preparer's Use Only	Preparer's signature: <u>Sara K. Pisani</u> Firm's name (or yours if self-employed), address, and ZIP + 4: <u>874 Broadway</u> <u>Brentwood, NY 11717</u>	Date: <u>10/26/10</u> Check if self-employed: <input checked="" type="checkbox"/> Preparer's identifying number (see instructions): <u>N/A</u> EIN: <u>N/A</u> Phone no: <u>(631) 804-2533</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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Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission:

See Schedule 0

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: 4100) (Expenses \$ 2,559,539. including grants of \$ 3,803,370.) (Revenue \$)

See Schedule 0

4b (Code: **1403**) (Expenses \$ **1,000,000** including grants of \$ **1,000,000**) (Revenue \$ **1,000,000**)

4c (Code 99-0000) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4d Other program services (Describe in Schedule O)

(Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4e Total program service expenses ▶	2,559,539.
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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? <i>If 'Yes,' complete Schedule I, Parts I and II</i>	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? <i>If 'Yes,' complete Schedule I, Parts I and III</i>		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? <i>If 'Yes,' complete Schedule J</i>		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? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25</i>		X
24b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
24c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
24d 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? <i>If 'Yes,' complete Schedule L, Part I</i>		X
25b 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? <i>If 'Yes,' complete Schedule L, Part I</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? <i>If 'Yes,' complete Schedule L, Part II</i>		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? <i>If 'Yes,' complete Schedule L, Part III</i>		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).		
28a A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
28b A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
28c 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? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>	X	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		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? <i>If 'Yes,' complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		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? <i>If 'Yes,' complete Schedule R, Part VI</i>		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	

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Form 990 (2009)

Part V 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	18	
1 b	Enter the number of Forms W-2G included in line 1 a Enter -0- if not applicable	0	
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	11	
2 b	If at least one is reported on line 2 a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1 a and 2 a 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 5 a or 5 b, 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
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).		
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	
b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided?	X	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If 'Yes,' indicate the number of Forms 8282 filed during the year	7 d	
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
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?		X
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the organization make any taxable distributions under section 4966?		
b	Did the organization make any distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter		
a	Initiation fees and capital contributions included on Part VIII, line 12	10 a	
b	Gross Receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10 b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from other members or shareholders	11 a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11 b	
12 a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12 a	
b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year	12 b	

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Form 990 (2009)

Part VI. 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
1 a Enter the number of voting members of the governing body	14	
b Enter the number of voting members that are independent	13	
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?		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?		X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5 Did the organization become aware during the year of a material diversion of the organization's assets?		X
6 Does the organization have members or stockholders?		X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
a The governing body?	X	
b Each committee with authority to act on behalf of the governing body?	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		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?		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?		
11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	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	X	
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	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 See Schedule O	X	
13 Does the organization have a written whistleblower policy?	X	
14 Does the organization have a written document retention and destruction policy?	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	X	
b Other officers of key employees of the organization See Schedule O	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?		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?		

Section C. Disclosures

17 List the states with which a copy of this Form 990 is required to be filed ► NY

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:
 ► Cori Parrish 520 Eighth Avenue, Suite 2203 New York NY 10018 212/620-9110

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**

1a 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			
Hugh Hogan Executive Direc	40	X			X			102,761.	0.	0.
Elise Boddie, Esq.	1	X						0.	0.	0.
Oona Chatterjee Chairman	1	X		X				0.	0.	0.
Jason Franklin Treasurer	1	X		X				0.	0.	0.
Pierre Hauser	1	X						0.	0.	0.
Sarah Hansen	1	X						0.	0.	0.
Henry Serrano	1	X						0.	0.	0.
Sarah Ludwig	1	X						0.	0.	0.
Sheila McDaniel	1	X						0.	0.	0.
Kevin Ryan Vice Chair	1	X		X				0.	0.	0.
Jonathan Schorr	1	X						0.	0.	0.
Jennifer Merschorf	1	X						0.	0.	0.
Nisha Atre Richardson Secretary	1	X		X				0.	0.	0.
Aarti Shahani	1	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			
1 b Total								102,761.	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

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

	Yes	No
3		X
4		X
5		X

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	1a Federated campaigns	1a				
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d				
	e Government grants (contributions)	1e				
	f All other contributions, gifts, grants, and similar amounts not included above	1f 5,726,863.				
	g Noncash contrbns included in lns 1a-1f	\$ 1,016,201.				
h Total. Add lines 1a-1f			5,726,863.			
PROGRAM SERVICE REVENUE	Business Code					
	2a Administrative fees		132,367.	132,367.		
	b Miscellaneous		4,605.	4,605.		
	c					
	d					
	e					
	f All other program service revenue					
g Total. Add lines 2a-2f			136,972.			
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts)		48,986.			48,986.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	(i) Real (ii) Personal					
	6a Gross Rents					
	b Less rental expenses					
	c Rental income or (loss)					
	d Net rental income or (loss)					
	(i) Securities (ii) Other					
	7a Gross amount from sales of assets other than inventory	406,826.				
	b Less cost or other basis and sales expenses	417,526.				
	c Gain or (loss)	-10,700.				
	d Net gain or (loss)	-10,700.	-10,700.			
	8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18		a 443,262.			
	b Less. direct expenses	b 83,346.				
	c Net income or (loss) from fundraising events		359,916.		359,916.	
	9a Gross income from gaming activities See Part IV, line 19		a			
b Less: direct expenses	b					
c Net income or (loss) from gaming activities						
10a 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						
11a						
b						
c						
d All other revenue						
e Total. Add lines 11a-11d						
12 Total revenue. See instructions			6,262,037.	126,272.	0.	408,902.

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).

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(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	1,989,441.	1,989,441.		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
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	102,761.	54,880.	25,324.	22,557.
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	334,814.	203,289.	66,567.	64,958.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	5,208.	3,073.	1,094.	1,041.
9 Other employee benefits	49,269.	29,069.	10,346.	9,854.
10 Payroll taxes	41,853.	24,693.	8,789.	8,371.
11 Fees for services (non-employees)				
a Management				
b Legal	3,476.	1,440.	2,036.	
c Accounting	12,080.		12,080.	
d Lobbying				
e Prof fundraising svcs. See Part IV, line 17				
f Investment management fees				
g Other				
12 Advertising and promotion	4,510.	2,255.		2,255.
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy	93,506.	55,168.	19,637.	18,701.
17 Travel	105.	62.	22.	21.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	19,851.	11,712.	4,169.	3,970.
23 Insurance	4,364.		4,364.	
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 Consultants	144,026.	91,465.	4,037.	48,524.
b Event expense	45,030.	14,171.		30,859.
c Printing and Publications	34,026.	23,864.	289.	9,873.
d Office expense	24,157.	7,283.	14,405.	2,469.
e Technical assistance	20,740.	20,740.		
f All other expenses	49,569.	26,934.	13,481.	9,154.
25 Total functional expenses. Add lines 1 through 24f	2,978,786.	2,559,539.	186,640.	232,607.
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				

BAA

Form 990 (2009)

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
ASSETS	1 Cash — non-interest-bearing	34,290.	1	62,301.
	2 Savings and temporary cash investments	1,790,093.	2	2,777,536.
	3 Pledges and grants receivable, net	87,110.	3	1,855,392.
	4 Accounts receivable, net	962.	4	9,488.
	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	5,797.	9	2,798.
	10a Land, buildings, and equipment: cost or other basis Complete Part VI of Schedule D	10a 192,837.		
	b Less accumulated depreciation.	10b 84,007.	10c	108,830.
	11 Investments — publicly-traded securities	230,500.	11	1,038,893.
	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	73,386.	15	14,341.	
16 Total assets Add lines 1 through 15 (must equal line 34)	2,350,022.	16	5,869,579.	
LIABILITIES	17 Accounts payable and accrued expenses	5,874.	17	8,395.
	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	81,860.	25	320,602.
	26 Total liabilities Add lines 17 through 25	87,734.	26	328,997.
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	837,456.	27	2,026,812.
	28 Temporarily restricted net assets	424,832.	28	2,513,770.
	29 Permanently restricted net assets	1,000,000.	29	1,000,000.
	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	2,262,288.	33	5,540,582.
	34 Total liabilities and net assets/fund balances.	2,350,022.	34	5,869,579.

BAA

Form 990 (2009)

Part XI Financial Statements and Reporting

1 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
1		
2a		X
2b	X	
2c	X	
3a		X
3b		

BAA

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'.)	1,463,623.	993,600.	2,082,496.	2,384,153.	5,726,863.	12,650,735.
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf						0.
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.						0.
4 Total. Add lines 1 through 3	1,463,623.	993,600.	2,082,496.	2,384,153.	5,726,863.	12,650,735.
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)						0.
6 Public support. Subtract line 5 from line 4						12,650,735.

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	1,463,623.	993,600.	2,082,496.	2,384,153.	5,726,863.	12,650,735.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	109,495.	106,971.	92,009.	56,539.	48,986.	414,000.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						0.
11 Total support. Add lines 7 through 10						13,064,735.
12 Gross receipts from related activities, etc. (see instructions)					12	0.
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	96.8 %
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	94.4 %
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 checked="" 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"/>		

BAA

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.")						
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						
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						
7a Amounts included on lines 1, 2, 3 received from disqualified persons						
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						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

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						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on 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.)						
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	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	%
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. <input type="checkbox"/>		
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. <input type="checkbox"/>		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. <input type="checkbox"/>		

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]

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

► **Complete if the organization is described below.**

► **Attach to Form 990 or Form 990-EZ. ► See separate instructions.**

OMB No 1545-0047

2009

**Open to Public
Inspection**

If the organization answered 'Yes,' to Form 990, Part IV, line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations. complete Parts I-A and B. Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations. complete Parts I-A and C below. Do not complete Part I-B
- Section 527 organizations. complete Part I-A only

If the organization answered 'Yes,' to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)). Complete Part II-A. Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)). Complete Part II-B. Do not complete Part II-A

If the organization answered 'Yes,' to Form 990, Part IV, line 5 (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations. Complete Part III

Name of organization

North Star Fund, Inc.

Employer identification number

13-2950801

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV
- 2 Political expenditures ► \$
- 3 Volunteer hours

Part I-B Complete if the organization is exempt under section 501(c)(3).

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ► \$ 0.
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ► \$ 0.
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year?
☐ Yes ☐ No
- 4a Was a correction made?
☐ Yes ☐ No
b If 'Yes,' describe in Part IV

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ► \$
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ► \$
- 3 Total of exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ► \$ ☐ Yes ☐ No
- 4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule C (Form 990 or 990-EZ) 2009

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A** Check ☐ if the filing organization belongs to an affiliated group
- B** Check ☐ if the filing organization checked box A and 'limited control' provisions apply

Limits on Lobbying Expenditures –
(The term 'expenditures' means amounts paid or incurred.)(a) Filing
organization's totals(b) Affiliated
group totals**1 a** Total lobbying expenditures to influence public opinion (grass roots lobbying)**b** Total lobbying expenditures to influence a legislative body (direct lobbying)**c** Total lobbying expenditures (add lines 1a and 1b)**d** Other exempt purpose expenditures**e** Total exempt purpose expenditures (add lines 1c and 1d)**f** Lobbying nontaxable amount Enter the amount from the following table in both columns

If the amount on line 1e, column (a) or (b) is	The lobbying nontaxable amount is
Not over \$500,000	20% of the amount on line 1e
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000
Over \$17,000,000	\$1,000,000

g Grassroots nontaxable amount (enter 25% of line 1f)**h** Subtract line 1g from line 1a. If zero or less, enter -0-**i** Subtract line 1f from line 1c. If zero or less, enter -0-**j** If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?☐ Yes ☐ No

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) Total
2a Lobbying non-taxable amount					
b Lobbying ceiling amount (150% of line 2a, column (e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

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Schedule C (Form 990 or 990-EZ) 2009

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
a Volunteers?		X	
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	X		
c Media advertisements?		X	
d Mailings to members, legislators, or the public?		X	
e Publications, or published or broadcast statements?		X	
f Grants to other organizations for lobbying purposes?		X	
g Direct contact with legislators, their staffs, government officials, or a legislative body?		X	
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?	X		174.
i Other activities? If 'Yes,' describe in Part IV		X	
j Total. Add lines 1c through 1i			174.
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		X	
b If 'Yes,' enter the amount of any tax incurred under section 4912			
c If 'Yes,' enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?		X	

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3 Did the organization agree to carryover lobbying and political expenditures from the prior year?	3	

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered 'No' OR if Part III-A, line 3 is answered 'Yes.'

1 Dues, assessments and similar amounts from members	1	
2 Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	
b Carryover from last year	2b	
c Total	2c	
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5 Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5, and Part II-B, line 1i. Also, complete this part for any additional information.

Part IV	Supplemental Information <i>(continued)</i>
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**SCHEDULE D
(Form 990)**Department of the Treasury
Internal Revenue Service

Name of the organization

North Star Fund, Inc.

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

13-2950801

Part II 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	22	
2 Aggregate contributions to (during year)	3,604,870.	
3 Aggregate grants from (during year)	1,536,878.	
4 Aggregate value at end of year	2,410,656.	

- 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? ☒ Yes ☐ 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? ☒ Yes ☐ No

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

- 1a 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:

- c Beginning balance
 d Additions during the year
 e Distributions during the year
 f Ending balance

	Amount
1c	
1d	
1e	
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.

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a	1,000,000.	1,000,000.			
b					
c					
d					
e					
f					
g	1,000,000.	1,000,000.			

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

a Board designated or quasi-endowment ▶ _____ %

b Permanent endowment ▶ 100.00 %

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

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

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

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

See Part XIV

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		140,404.	49,141.	91,263.
d Equipment		35,245.	29,220.	6,025.
e Other		17,188.	5,646.	11,542.
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				108,830.

BAA

Schedule D (Form 990) 2009

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)	6,262,037.
2	Total expenses (Form 990, Part IX, column (A), line 25)	2,978,786.
3	Excess or (deficit) for the year Subtract line 2 from line 1	3,283,251.
4	Net unrealized gains (losses) on investments	-4,957.
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	-4,957.
10	Excess or (deficit) for the year per audited financial statements Combine lines 3 and 9	3,278,294.

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	6,257,080.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	-4,957.
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	-4,957.
3	Subtract line 2e from line 1	3	6,262,037.
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	6,262,037.

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

1	Total expenses and losses per audited financial statements	1	2,978,786.
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	2,978,786.
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	2,978,786.

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 V, Line 4 - Intended Uses Of Endowment Fund

The intended use of the \$1,000,000 endowment is to hold it in perpetuity, protecting the principal from depreciation, while investing it for income which will be used for unrestricted purposes.

Part XIV Supplemental Information (continued)[illegible]

Department of the Treasury
Internal Revenue Service

Complete if the organization answered 'Yes' to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

2009

Open to Public Inspection

Name of the organization

North Star Fund, Inc.

Employer identification number

13-2950801

Part I

Fundraising Activities. Complete if the organization answered 'Yes' to Form 990, Part IV, line 17. Form 990EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply

- | | |
|---|--|
| <input type="checkbox"/> Mail solicitations | <input type="checkbox"/> Solicitation of non-government grants |
| <input type="checkbox"/> Internet and email solicitations | <input type="checkbox"/> Solicitation of government grants |
| <input type="checkbox"/> Phone solicitations | <input type="checkbox"/> Special fundraising events |
| <input type="checkbox"/> In-person solicitations | |

2a Did the organization have written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☐ Yes ☒ No

b If 'Yes,' list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization

(i) Name of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
Total						0.

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing

NY

Part II Fundraising Events. Complete if the organization answered 'Yes' to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

REVENUE		(a) Event #1 Gala (event type)	(b) Event #2 News Prize (event type)	(c) Other Events 1 (total number)	(d) Total Events (Add col (a) through col (c))
	1 Gross receipts	397,900.	23,012.	22,350.	443,262.
	2 Less Charitable contributions				
	3 Gross income (line 1 minus line 2)	397,900.	23,012.	22,350.	443,262.
DIRECT EXPENSES	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs		5,150.		5,150.
	7 Food and beverages	63,840.		3,705.	67,545.
	8 Entertainment	1,100.			1,100.
	9 Other direct expenses	9,551.			9,551.
	10 Direct expense summary Add lines 4- through 9 in column (d)				83,346.
	11 Net income summary Combine lines 3, column (d) and line 10				359,916.

Part III Gaming. Complete if the organization answered 'Yes' to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

REVENUE		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col. (a) through col (c))
	1 Gross revenue				
DIRECT EXPENSES	2 Cash prizes				
	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
	7 Direct expense summary Add lines 2 through 5 in column (d)				
	8 Net gaming income summary Combine lines 1, column (d) and line 7				

9 Enter the state(s) in which the organization operates gaming activities: _____

a Is the organization licensed to operate gaming activities in each of these states?

b If 'No,' explain:

YES NO

9a

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?

b If 'Yes,' explain

10a

11 Does the organization operate gaming activities with nonmembers?

11

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

12

13 Indicate the percentage of gaming activity operated in:**a** The organization's facility**13a** %**b** An outside facility**13b** %**14** Enter the name and address of the person who prepares the organization's gaming/special events books and records.

Name ▶ _____

Address ▶ _____

15a Does the organization have a contact with a third party from whom the organization receives gaming revenue?**b** If 'Yes,' enter the amount of gaming revenue received by the organization \$ _____ and the amount of gaming revenue retained by the third party \$ _____**c** If 'Yes,' enter name and address of the third party:

Name: ▶ _____

Address ▶ _____

16 Gaming manager information

Name: ▶ _____

Gaming manager compensation ▶ \$ _____

Description of services provided. ▶ _____

☐ Director/officer☐ Employee☐ Independent contractor**17** Mandatory distributions**a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?**b** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ _____

BAA

TEEA3703L 02/05/10

Schedule G (Form 990 or 990-EZ) 2009

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

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

Employer identification number

North Star Fund, Inc.

13-2950801

Part I	General Information on Grants and Assistance
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- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

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

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

- 3 Enter total number of other organizations**

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

TEEA3901L 02/10/10

Schedule I (Form 990) 2009

Organization	EIN	Street1	City	State	Zip	Amount	Purpose
A J Muste Memorial Institute	23-7379088	339 Lafayette Street	New York	NY	10012-2725	36,500	general support and costs to attend US Social Forum for VAMOS Unidos and Movement for Justice in El Barrio
Adhikar for Human Rights and Social Justice	20-3384725	71-07 Woodside Avenue	Woodside	NY	11377	12,000	general support and costs to attend the US Social Forum
After Dark CATV Productions	13-3612355	1425 Bryant Ave Box 16	Bronx	NY	10459	30,000	activities as outlined in the proposal for Mi Rincon Favorito
Al Awda New York	25-1863915	7201 5th Avenue	Brooklyn	NY	11209	10,000	general support
Applied Research Center	94-2759879	900 Alice Street	Oakland	CA	94607	2,500	general support
Asian & Pacific Islander Coalition on HIV/AIDS	13-3706365	400 Broadway	New York	NY	10013	15,000	general support, but may not be used to pay for the salary of Ding Pajaron
Asociacion de Egresados de la UASD	13-3679180	538 Claremont Parkway, 2nd Fl	Bronx	NY	10457	30,000	activities as outlined in the proposal
Asociacion de Provincias Dominicanas (AsoProDom)	06-1651016	1435 Ogden Ave	Bronx	NY	10452	35,000	activities as outlined in the proposal
Association for Neighborhood & Housing Development	13-2775999	50 Broad St., Suite 1125	New York	NY	10001	15,000	the Center for Neighborhood Leadership
Brandworkers International NY	26-0798625	PO Box 1257	Long Island Cit NY	NY	11101-5325	25,000	general support and the Focus on the Food Chain campaign
Bronx Academy of Arts and Dance! (BAAD!)	13-3997265	841 Barretto Street 2nd Floor	Bronx	NY	10474	16,000	activities as outlined in the proposal
Bronx Children's Museum	26-0579140	P O Box 1381	Bronx	NY	10451	2,500	general support
Bronx Defenders	13-3931074	860 Courtlundt Avenue	Bronx	NY	10451	7,500	general support for Voter Enfranchisement Project
Bronx Land Trust	20-1039910	232 East 11th Street	New York	NY	10003	5,000	general support
Bronx News Network	27-0218689	3400 Reservoir Oval East	Bronx	NY	10467	15,000	general support
Brooklyn Congregations United	61-1567317	890 Flatbush Avenue	Brooklyn	NY	11226-4018	11,500	general support and costs associated with an immigration rally
Brooklyn Young Mothers' Collective	20-3792503	388 Atlantic Ave 3rd Fl	Brooklyn	NY	11217	10,000	general support
Bushwick Housing Independence Project	20-1518304	144 Bleecker Street	Brooklyn	NY	11221	5,000	general support
CAAAV Organizing Asian Communities	13-3526938	2473 Valentine Avenue	Bronx	NY	10458-5305	1,500	campaign costs for Domestic Workers United
Casa Atabaché - The House of Womyn's Power	13-3826727	471 East 140th Street, Basement Level	Bronx	NY	10454-2555	70,000	activities as outlined in the proposal
Center for Immigrant Families	13-3976033	20 West 104th St., Basement	New York	NY	10025	10,000	general support
Center for Urban Pedagogy	11-3625306	232 Third St #D201	Brooklyn	NY	11215	15,000	general support
CHANGER	16-1764680	55 W 125th Street, 10th Floor	New York	NY	10023	1,000	constituent meetings with legislators in DC on October 29, 2009
Coalition for Parole Restoration	11-3581633	P O Box 1379	New York	NY	10013-0877	10,000	general support
Commission on the Public's Health System	13-4073990	45 Clinton St	New York	NY	10002	10,000	general support
Committee for Transport Workers' Rights	27-1912876	1444 E 19th St	Brooklyn	NY	11230	10,000	general support
Community Voices Heard	13-3901997	115 East 106th Street, 3rd Floor	New York	NY	10029	15,000	costs to attend the US Social Forum and the Voter Power Project
Coro New York Leadership Center	13-3571610	42 Broadway, 18th Fl	New York	NY	10004	45,000	direct support of programs
Critical Resistance -- New York City	20-4412916	976 Longwood Ave	Bronx	NY	10459-5008	15,000	activities as outlined in the proposal
Cultural Renaissance for Economic Revitalization, CRER	56-2286208	522 Morris Park Ave	Bronx	NY	10460	30,000	activities as outlined in the proposal
DAMAYAN Migrant Workers Association	03-0481206	406 West 40th Street, 3rd Floor	New York	NY	10018	17,000	general support and costs to attend the US Social Forum
Desis Rising Up and Moving (DRUM)	38-3652741	72-18 Roosevelt Avenue	Jackson Heights NY	NY	11372	800	costs associated with Albany visits for student metrocards
El Centro del Inmigrante	13-4178608	1546 Castleton Ave	Staten Island	NY	10302	13,250	general support and costs associated with an immigration rally
Families for Freedom	20-2798922	3 West 29th Street, Ste 1030	New York	NY	10001-4567	18,700	general support and costs to attend the US Social Forum
Families United for Racial and Economic Equality (FUREE)	20-0092728	81 Willoughby Street, #701	Brooklyn	NY	11201	4,000	general support, the civic engagement project and costs to attend the US Social Forum
For a Better Bronx	01-0811054	199 Lincoln Ave #214	Bronx	NY	10454	110,500	activities as outlined in the proposals for FABB and Green Youth Collective
Freedom Community Resource Center	13-4043241	455 E 140th St	Bronx	NY	10454	20,000	activities as outlined in the proposal
Friends of Brook Park	04-3758932	P O Box 801	Bronx	NY	10454	10,000	activities as outlined in the proposal
Fund for the City of New York	13-2612524	121 Ave of the Americas, 6th Floor	New York	NY	10013-1590	42,000	People's Production House's Radio Rootz and general support for Brooklyn Movement Center
Girls Education and Mentoring Services (GEMS)	13-415-0972	298 B West 149th St	New York	NY	10039	10,000	general support
Greater New York Labor-Religion Coalition	13-4004010	125 Maiden Lane, 5th Fl	New York	NY	10038-4912	10,000	general support
Green Worker Cooperatives	20-1828936	461 Timpson Place	Bronx	NY	10455-4910	25,000	activities as outlined in the proposal
Hesperian Foundation	94-6109093	1919 Addison St #304	Berkeley	CA	94704	2,000	general support for Likhaan
International Center for Global Communications Foundation	13-3580901	P O Box 677	New York	NY	10035	1,500	Between the Lines show of Squeaky Wheel Productions
International School of Brooklyn	13-4303389	237 Park Place	Brooklyn	NY	11238	15,000	general support

Organization	EIN	Street1	City	State	Zip	Amount	Purpose
Interreligious Foundation for Community Organization	13-2590548	418 West 145th St	New York	NY	10031-5202	87,641	general support for Flanwayan Haitian Literacy Project, Lakou NY and Haitian Women for Haitian Refugees and Haiti earthquake relief
Isaiah Sypher	N/A	45 Wyllys Ave	Middletown	CT	6459	1,500	books, supplies and tuition for college
Judson Memorial Church	13-2684489	55 Washington Sq South	New York	NY	10012	5,000	general support for New Sanctuary Coalition of NYC
Just Food	06-1555759	1155 Avenue of the Americas, 3rd Floor	New York	NY	10036	10,000	general support
Justice Committee	36-4576355	P O Box 1885	New York	NY	10159	5,000	general support
Justice Works Community	11-3114336	1012 Eighth Ave	Brooklyn	NY	11215	15,000	activities as outlined in the proposal for Seven Neighborhood Action Partnership (SNAP)
Kingsbridge Heights Neighborhood Improvement Associat	13-3266668	2805 University Avenue, Apartment B	Bronx	NY	10468-2608	20,000	general support and activities as outlined in the proposal costs to attend the US Social Forum for Domestic Workers
La Fuente	65-1198030	101 Avenue of the Americas, 17th Floor	New York	NY	10013	3,000	United
La Union	26-3319323	621 DeGraw Street	Brooklyn	NY	11217-3120	17,300	general support, costs to attend the US Social Forum and a bus to DC for immigration reform
Latin American & Caribbean Community Center	20-0440935	P O Box 89308	Atlanta	GA	30312	5,000	general support for Ciudadao Global/Global Citizen
Latino Pastoral Action Center	13-3883350	14 West 170th St	Bronx	NY	10452	10,000	activities as outlined in the proposal for Servicing Our Youth Literacy Assistance Center (SOY)
Literacy Assistance Center	13-3179618	32 Broadway, 10th Fl	New York	NY	10004	25,000	general support
Make the Road New York	11-3344369	301 Grove Street	Brooklyn	NY	11237-5664	26,000	the Community Voter Power Project, costs associated with an immigration rally, costs to attend the US Social Forum and general support for Ojo de Agua, Arte y Producción
Malcolm X Grassroots Movement	11-3574918	1260 Bedford Ave	Brooklyn	NY	11216	5,000	general support
Mass Transit Street Theater and Video	13-6533451	PO Box 347, Jerome Ave Station	Bronx	NY	10468	10,000	activities as outlined in the proposal
Metropolitan Council on Housing	13-3580918	339 Lafayette Street Suite 301	New York	NY	10012	15,000	general support
Minkwon Center for Community Action	11-2710506	136-19 41st Avenue, 3rd Floor	Flushing	NY	11355	5,750	the Civic Participation Program and costs associated with an immigration rally
Mirabal Sisters Cultural and Community Center	06-1629188	618 W 142nd Street, Ground Level	New York	NY	10031	15,000	general support for Kalabash Food Cooperative
Mison San Juan Baulista	31-1629166	948 E 156th St	Bronx	NY	10455	25,000	activities as outlined in the proposal
More Gardens! Fund	52-2415900	79 Clinton St #17	New York	NY	10002	12,500	activities as outlined in the proposal
Mothers on the Move	13-3768715	928 Intervale Avenue	Bronx	NY	10459-4226	75,000	activities as outlined in the proposals for MOM and Rebel Diaz Arts Collective and costs to attend the US Social Forum
Movimiento La Peña del Bronx	16-1661092	272 Alexander Avenue Apt 1A	Bronx	NY	10454-1139	76,000	activities as outlined in the proposals for La Peña and Taller Experimental de Arte
Muslim Women's Institute for Research and Development	80-0010627	1363 Ogden Ave	Bronx	NY	10452	38,000	activities as outlined in the proposal
Nafissatou Traore	N/A	96 Ralph Ave #3L	Brooklyn	NY	11221	1,500	books, supplies and tuition for college
New Immigrant Community Empowerment (NICE)	11-3560625	37-41 77th Street, 2nd Fl	Jackson Heights	NY	11372-6629	28,500	general support, costs to attend the US Social Forum and a bus to DC for immigration reform
New York Foundation for the Arts	23-7129564	20 Jay St Suite 740	Brooklyn	NY	11201	5,000	Urban Art Beat
NY Immigration Coalition	13-3573409	137-139 W 25th St 12th Fl	New York	NY	10001	20,000	general support for NY State Youth Leadership Council and a bus to DC for immigration reform
NYC AIDS Housing Network (NYCAHN)	13-4094385	80A 4th Avenue, Suite 10D	Brooklyn	NY	11217	4,500	general support, the MovementVote Project and travel to Albany to educate legislators on HIV/AIDS affordable housing bill
NYC Community Garden Coalition	13-4035337	232 E 11th St	New York	NY	10003	5,000	general support
Osborne Association	13-5563028	809 Westchester Ave	Bronx	NY	10455	15,000	general support for Women on the Rise Telling HerStory (WORTH)
Peer Global Environment Foundation	52-2247006	825 Capitol Square Pl, SW	Washington	DC	20024	1,500	direct project costs in Africa for Witsand Project/Peer Africa buses to the March for Jobs and tent city protests around the G-20 for Bail Out the People Movement
People's Rights Fund, Inc	13-3270831	55 W 17th St 5th Floor	New York	NY	10011	1,000	G-20 for Bail Out the People Movement
Physicians for a National Health Program/NY Chapter (PN	04-2937697	P O Box 50193	Brooklyn	NY	11205	1,000	general support
Picture the Homeless	32-0017919	2427 Morris Ave, 2nd Floor	Bronx	NY	10468	6,000	activities to respond to unexpected policy changes that impact homeless New Yorkers and costs to attend the US Social Forum

Organization	EIN	Street1	City	State	Zip	Amount	Purpose
Pitzer College	95-2261113	1050 North Mills Avenue	Claremont	CA	91711	10,000	the Leadership in Environmental Education Development
Pratt Institute for Community Development	11-1630822	379 DeKalb Avenue, 2nd Floor	Brooklyn	NY	11205	10,000	(LEED) program
Prison Policy Initiative	20-3671130	P O Box 127	Northampton	MA	1061	500	general support for Housing Here and Now
Project Hospitality	13-3234441	100 Park Avenue	Staten Island	NY	10302-1440	5,000	general support for Eye Openers Youth Against Violence
Project South	58-1956866	9 Gammon Ave	Atlanta	GA	30315	500	Organization
Prometheus Radio Project	23-3013087	P O Box 42158	Philadelphia	PA	19101	15,000	general support
Public Policy & Education Fund	13-3364209	94 Central Ave	Albany	NY	12206	1,000	activities to dispel myths and rumors about ACORN and
Queens Congregations United for Action	80-0122559	103-04 39th Ave , #105	Corona	NY	11368-2336	10,000	community organizing
Rajkuman Cultural Center	11-3338875	83-84 116th St Suite 2K	Richmond Hill	NY	11418	5,000	general support for Jahajee Sisters Empowering Indo-
Right to the City NYC	94-3462187	81 Willoughby St #701	Brooklyn	NY	11201	15,000	Caribbean Women
River Park Nursery School	13-2587662	711 Amsterdam Ave	New York	NY	10025	5,000	general support
Servicio de Educación Básica (SEBI)	74-3154983	941 Intervale Ave 1st Floor	Bronx	NY	10459-3135	258,000	activities as outlined in the proposals for SEBI, Bronx
Sistas on the Rise	87-0725333	P O Box 740581	Bronx	NY	10474-0010	60,000	Alternative Action, Centro de Servicios Cooperativos,
SisterSong Women of Color Reproductive Health Collectiv	51-0544927	1237 Ralph David Abernathy Blvd SW	Atlanta	GA	30310	1,000	Cooperative de Mujeres en Accion and N-KE-HURA
Social, Economic & Cultural Development Fund	61-1461413	P O Box 3523 Church St Station	New York	NY	10008	10,000	general support and activities as outlined in the proposal
South Bronx Food Cooperative	26-1762439	P O Box 484	Bronx	NY	10458	20,000	challenge grant for general support
Southern Echo	64-0819311	1350 Livingston Lane Suite C	Jackson	MS	39211	10,000	activities as outlined in the proposal
Teachers Unite	11-3826739	90 John St, Suite 308	New York	NY	10038	5,000	general support for Pushback Network
Teamster Rank & File Education and Legal Defense Fdn	38-2883689	P O Box 10303	Detroit	MI	48210	10,000	general support for NY/NJ Teamsters for a Democratic
The Correctional Association of NY Women in Prison Proj	13-5562324	2090 Adam Clayton Powell Jr Blvd	New York	NY	10027-4990	6,000	Union (TDU)
Third Sector New England	04-2261109	89 South St Suite 700	Boston	MA	2111	1,000	general support and WIPP advocacy day
Third Wave Foundation	13-3670260	25 East 21st St 4th Floor	New York	NY	10010	500	general support for Resource Generation
Third World Newsreel	13-2624257	545 Eighth Avenue, 10th Floor	New York	NY	10018	5,000	general support for AWAAM Arab Women Active in the Arts
Three Rivers Community Foundation	25-1615511	100 N Braddock Ave Suite 302	Pittsburgh	PA	15208	1,500	and Media
Transnational Institute for Grassroots Research and Actio	26-0728941	32 Broadway Suite 1801	New York	NY	10004	15,000	activities and grants related to the G-20
United for a Fair Economy	04-3286118	29 Winter St	Boston	MA	2108	3,000	general support
Urban Agenda	77-0660434	50 Broadway, Suite 1601	New York	NY	10004	10,000	the Tax Fairness Organizing Collaborative
Urban Justice Center	13-3442022	123 William St 16th Fl	New York	NY	10038-3800	36,500	the Good Food, Good Jobs, Strong Communities program
Urbana-Champaign Independent Media Center Foundation	37-1403593	200 S Broadway Avenue, Ste 100	Urbana	IL	61821	25,000	general support for Sex Workers Project, Street Vendor
Youth Communication New York Center	13-3047555	224 W 29th St 2nd Fl	New York	NY	10001	12,500	Disabilities
Youth Ministries for Peace and Justice	13-4006535	1384 Stratford Avenue	Bronx	NY	10472	10,000	general support for IndyKids
						1,989,441	general support for Rise Magazine

**SCHEDULE M
(Form 990)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

► **Complete if the organizations answered 'Yes'**
on Form 990, Part IV, lines 29 or 30.
► **Attach to Form 990.**

OMB No 1545-0047

2009

**Open To Public
Inspection**

Name of the organization

North Star Fund, Inc.

Employer identification number

13-2950801

Part I Types of Property

	(a) Check if applicable	(b) Number of Contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	8	1,016,201.	Fair value
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution— Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ► ()				
26 Other ► ()				
27 Other ► ()				
28 Other ► ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

b If 'Yes,' describe the arrangement in Part II

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If 'Yes,' describe in Part II

33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II.

	Yes	No
30a		X
31		X
32a		X
33		

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2009

Part III **Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

This image shows a full page of a handwriting practice worksheet. It consists of multiple sets of three horizontal dashed lines spaced evenly down the page, providing a guide for letter height and placement. The background is plain white, and there are no other markings or text present.

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

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Form 990, Part III, Line 1 - Organization Mission

North Star Fund is New York's community foundation supporting grassroots groups leading the movement for equality, economic justice and peace. By organizing donors, raising money for grants, and providing technical assistance, we support efforts ranging from better schools, housing and health care, to protecting civil liberties, creating living wage jobs, and advocating for peace, freedom and human rights.

North Star Fund supports grassroots activism and organizing to achieve social justice and the common good. Our core grantmaking program provides support grants of \$5,000, \$10,000 and \$15,000 to social change organizations in New York City. North Star Fund has two grant cycles per year, one in the Spring with a deadline on or about February 15th and one in the Fall with a deadline on or about September 15th. Applications are accepted beginning one month before the deadline. Visit our website at www.northstarfund.org for the guidelines, application form and instructions.

Form 990, Part III, Line 4a - Program Service Accomplishments

In 1979, a network of 28 young visionaries established North Star Fund – a foundation that forged a new approach to giving. Inspired by the era's movements for social justice, they created a collaborative, activist-led philanthropy. For three decades, North Star Fund has remained an agile, community-driven foundation. Since 1979, it has distributed more than \$30.5 million to over 1,600 groups to fund innovative community organizing and grassroots activism.

Through funding programs in New York City, North Star Fund seeks to contribute to a

Name of the organization

North Star Fund, Inc.

Employer identification number

13-2950801

Form 990, Part III, Line 4a - Program Service Accomplishments (continued)

transformed society by: an equitable distribution of wealth and resources, both within and beyond our national boundaries; the realization of democratic process through the exercise of political power by historically disempowered peoples and communities; the well-being of people and the environment placed above profit; an end to oppression and exploitation of people everywhere; peaceful and just settlements of conflict; freedom from institutional, cultural, and economic discrimination based on class, race, gender, age, disability, religion, or sexual orientation; and an affirmation of diversity, and respect for the dignity and inherent value of all individuals.

Grantmaking programs include: Supporting innovation: Our activist-led Community Funding Committee awards grants to New York's most effective and creative social change groups. Developing skills: Grantees learn financial management, fundraising, board development, and more through technical assistance programs. Movement building: North Star Fund links groups to share vision, strategy, and resources to build movements with deeper impact.

Donor programs include: A philanthropy committed to change: North Star Fund connects people with wealth to grassroots activism that challenges the root causes of social problems. Organize donors to reflect our region: Innovative programs engage people who give inherited wealth and earned income, professionals of color, and LGBT donors.

Donor advised services: North Star Fund draws on its deep knowledge of community issues and its management expertise to help individuals, families, and foundation partners develop effective grantmaking strategies. Beyond giving: Through publications and workshops, it builds knowledge of socially responsible investing and progressive estate planning.

Name of the organization

North Star Fund, Inc.

Employer identification number

13-2950801

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

The draft 990 was presented to the Finance Committee of the Board and reviewed in detail. The full Board was presented with the draft 990 and the Finance Committee recommended the draft 990 to the full Board for approval. The full Board approved the draft 990 to be submitted as the final 990 by a unanimous vote.

Form 990, Part VI, Line 12c - Explanation of Monitoring and Enforcement of Conflicts

Board members annually review the conflict of interest policy and disclose any conflicts they may have on a written form.

Form 990, Part VI, Line 15b - Compensation Review & Approval Process for Officers & Key Employees

The Executive Director's salary and benefits are presented to the Executive Committee of the Board, which reviews and approves them, both for the prior year and budgeted projections for the coming year. The full Board approves the Executive Director's salary and benefits in aggregate form as part of the annual budget, which they vote on each year.

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

Governing docs, policies and financial statements are all available upon request & filed with the appropriate government agencies.

Name of the organization

North Star Fund, Inc.

Employer identification number

13-2950801