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Form **990-EZ**Department of the Treasury  
Internal Revenue Service**Short Form**  
**Return of Organization Exempt From Income Tax**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.

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

OMB No 1545-1150

**2009****Open to Public Inspection****A** For the 2009 calendar year, or tax year beginning 9/01, 2009, and ending 8/31, 2010**B** Check if applicable:

- ☒ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Termination
- ☐ Amended return
- ☐ Application pending

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

**C**  
**ROSEN INSTITUTE**  
**1966 TICE VALLEY BLVD #235**  
**WALNUT CREEK, CA 94595**
**D** Employer identification number

94-2898289

**E** Telephone number

925-938-7754

**F** Group Exemption Number

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

**G** Accounting method ☒ Cash ☐ Accrual  
Other (specify) ▶**I** Website: ▶ rosenmethod.org**H** Check ☒ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF).**J** Tax-exempt status (check only one) — ☒ 501(c) ( 3 ) (insert no) ☐ 4947(a)(1) or ☐ 527**K** Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally **not** more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$500,000 or more, file Form 990 instead of Form 990-EZ▶ \$ 37,312.**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

|           |                                                                                                                                                  |           |          |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b>  | Contributions, gifts, grants, and similar amounts received                                                                                       | <b>1</b>  | 27,175.  |
| <b>2</b>  | Program service revenue including government fees and contracts                                                                                  | <b>2</b>  | 10,137.  |
| <b>3</b>  | Membership dues and assessments                                                                                                                  | <b>3</b>  |          |
| <b>4</b>  | Investment income                                                                                                                                | <b>4</b>  |          |
| <b>5a</b> | Gross amount from sale of assets other than inventory                                                                                            | <b>5a</b> |          |
| <b>5b</b> | Less: cost or other basis and sales expenses                                                                                                     | <b>5b</b> |          |
| <b>5c</b> | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)                                                          | <b>5c</b> |          |
| <b>6</b>  | Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>       |           |          |
| <b>6a</b> | Gross revenue (not including \$ _____ of contributions reported on line 1)                                                                       | <b>6a</b> |          |
| <b>6b</b> | Less: direct expenses other than fundraising expenses                                                                                            | <b>6b</b> |          |
| <b>6c</b> | Net income or (loss) from special events and activities (Subtract line 6b from line 6a)                                                          | <b>6c</b> |          |
| <b>7a</b> | Gross sales of inventory, less returns and allowances                                                                                            | <b>7a</b> |          |
| <b>7b</b> | Less: cost of goods sold                                                                                                                         | <b>7b</b> |          |
| <b>7c</b> | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)                                                                   | <b>7c</b> |          |
| <b>8</b>  | Other revenue (describe ▶ _____)                                                                                                                 | <b>8</b>  |          |
| <b>9</b>  | <b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8                                                                                    | <b>9</b>  | 37,312.  |
| <b>10</b> | Grants and similar amounts paid (attach schedule)                                                                                                | <b>10</b> |          |
| <b>11</b> | Benefits paid to or for members                                                                                                                  | <b>11</b> |          |
| <b>12</b> | Salaries, other compensation, and employee benefits                                                                                              | <b>12</b> |          |
| <b>13</b> | Professional fees and other payments to independent contractors                                                                                  | <b>13</b> | 8,488.   |
| <b>14</b> | Occupancy, rent, utilities, and maintenance                                                                                                      | <b>14</b> |          |
| <b>15</b> | Printing, publications, postage, and shipping                                                                                                    | <b>15</b> | 150.     |
| <b>16</b> | Other expenses (describe ▶ _____)                                                                                                                | <b>16</b> | 42,777.  |
| <b>17</b> | <b>Total expenses.</b> Add lines 10 through 16                                                                                                   | <b>17</b> | 51,415.  |
| <b>18</b> | Excess or (deficit) for the year (Subtract line 17 from line 9)                                                                                  | <b>18</b> | -14,103. |
| <b>19</b> | Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) | <b>19</b> | 21,893.  |
| <b>20</b> | Other changes in net assets or fund balances (attach explanation)                                                                                | <b>20</b> |          |
| <b>21</b> | Net assets or fund balances at end of year. Combine lines 18 through 20                                                                          | <b>21</b> | 7,790.   |

**Part II Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ

(See the instructions for Part II.)

|                                                                                              | (A) Beginning of year | (B) End of year |
|----------------------------------------------------------------------------------------------|-----------------------|-----------------|
| <b>22</b> Cash, savings, and investments                                                     | 21,767.               | 7,664.          |
| <b>23</b> Land and buildings                                                                 |                       |                 |
| <b>24</b> Other assets (describe ▶ <u>See Statement 2</u> )                                  | 126.                  | 126.            |
| <b>25</b> <b>Total assets</b>                                                                | 21,893.               | 7,790.          |
| <b>26</b> <b>Total liabilities</b> (describe ▶ _____)                                        | 0.                    | 0.              |
| <b>27</b> <b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21) | 21,893.               | 7,790.          |

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

Form 990-EZ (2009)

TEEA0803L 01/30/10

4

## Expenses

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

4947(a)(1) trusts, optional  
for others.)

|     |         |
|-----|---------|
| 28a | 32,663. |
|-----|---------|

|     |         |
|-----|---------|
| 28a | 32,663. |
|-----|---------|

|     |         |
|-----|---------|
| 29a | 12,940. |
|-----|---------|

|     |         |
|-----|---------|
| 29a | 12,940. |
|-----|---------|

|      |        |
|------|--------|
| 30 a | 5,812. |
|------|--------|

|      |        |
|------|--------|
| 30 a | 5,812. |
|------|--------|

|      |  |
|------|--|
| 31 a |  |
|------|--|

31 a

|    |         |
|----|---------|
| 32 | 51,415. |
|----|---------|

[illegible]

**Part V. Other Information** (Note the statement requirements in the instrs for Part V.) See Statement 7

|                                                                                                                                                                                                                                                                                                                                                                                                                          | Yes | No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>33</b> Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed description of each activity                                                                                                                                                                                                                                                                       |     | X  |
| <b>34</b> Were any changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the changes                                                                                                                                                                                                                                                                                               |     | X  |
| <b>35</b> If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T                                                                                                                                                              |     |    |
| <b>a</b> Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?                                                                                                                                                                                                                                                |     | X  |
| <b>b</b> If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?                                                                                                                                                                                                                                                                                                                                         |     |    |
| <b>36</b> Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N                                                                                                                                                                                                                              |     | X  |
| <b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions <b>37a</b> 0.                                                                                                                                                                                                                                                                                                    |     |    |
| <b>b</b> Did the organization file <b>Form 1120-POL</b> for this year?                                                                                                                                                                                                                                                                                                                                                   |     | X  |
| <b>38a</b> Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the period covered by this return?                                                                                                                                                                                    |     | X  |
| <b>b</b> If 'Yes,' complete Schedule L, Part II and enter the total amount involved <b>38b</b> N/A                                                                                                                                                                                                                                                                                                                       |     |    |
| <b>39</b> Section 501(c)(7) organizations. Enter.                                                                                                                                                                                                                                                                                                                                                                        |     |    |
| <b>a</b> Initiation fees and capital contributions included on line 9 <b>39a</b> N/A                                                                                                                                                                                                                                                                                                                                     |     |    |
| <b>b</b> Gross receipts, included on line 9, for public use of club facilities <b>39b</b> N/A                                                                                                                                                                                                                                                                                                                            |     |    |
| <b>40a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under section 4911 <b>0.</b> , section 4912 <b>0.</b> , section 4955 <b>0.</b>                                                                                                                                                                                                                               |     |    |
| <b>b</b> Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I <b>40b</b> X |     |    |
| <b>c</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <b>0.</b>                                                                                                                                                                                                                       |     |    |
| <b>d</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization <b>0.</b>                                                                                                                                                                                                                                                                                         |     |    |
| <b>e</b> All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T <b>40e</b> X                                                                                                                                                                                                                                           |     |    |
| <b>41</b> List the states with which a copy of this return is filed <b>None</b>                                                                                                                                                                                                                                                                                                                                          |     |    |

**42a** The organization's books are in care of **MARY KAY WRIGHT, TREASURER** Telephone no **925-938-7754**  
 Located at **1966 TICE VALEY BLVD # 235 WALNUT CREEK CA** ZIP + 4 **94595**

**b** At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? **42b** X  
 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 a Foreign Bank and Financial Accounts**

**c** At any time during the calendar year, did the organization maintain an office outside of the U.S.? **42c** X  
 If 'Yes,' enter the name of the foreign country: \_\_\_\_\_

**43** Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** — Check here ☐ N/A  
 and enter the amount of tax-exempt interest received or accrued during the tax year **43** N/A

|                                                                                                                                                                                     | Yes | No |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>44</b> Did the organization maintain any donor advised funds? If 'Yes,' Form 990 must be completed instead of Form 990-EZ                                                        |     | X  |
| <b>45</b> Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If 'Yes,' Form 990 must be completed instead of Form 990-EZ |     | X  |

**Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

**46** Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I

|            | Yes | No |
|------------|-----|----|
| <b>46</b>  |     | X  |
| <b>47</b>  |     | X  |
| <b>48</b>  |     | X  |
| <b>49a</b> |     | X  |
| <b>49b</b> |     |    |

**47** Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II

**48** Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E

**49a** Did the organization make any transfers to an exempt non-charitable related organization?

**b** If 'Yes,' was the related organization a section 527 organization?

**50** Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None'.

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

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

**51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None'.

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

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here** Date 5/3/11

Mary Kay Wright  
Signature of officer

MARY KAY WRIGHT, President, Board of Directors  
Type or print name and title

**Paid Preparer's Use Only**

Preparer's signature Jay S. Schnyder Date 4/28/11 Check if self-employed ☒ Preparer's Identifying Number (See instructions) N/A

Firm's name (or yours if self-employed), address, and ZIP + 4 Jay S. Schnyder, MS, EA  
6152 Valley View Road  
Oakland, CA 94611

EIN N/A Phone no (510) 338-1041

May the IRS discuss this return with the preparer shown above? See instructions

☒ Yes ☐ No

BAA

Form 990-EZ (2009)



**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in) ▶                                                                                                                                                                   | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| 1 Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants'.)                                                                                                                 |          |          |          |          |          |           |
| 2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf                                                                                                            |          |          |          |          |          |           |
| 3 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge. |          |          |          |          |          |           |
| 4 <b>Total.</b> Add lines 1-through 3                                                                                                                                                                           |          |          |          |          |          |           |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)           |          |          |          |          |          |           |
| 6 <b>Public support.</b> Subtract line 5 from line 4                                                                                                                                                            |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ▶                                                                                                                                                                       | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| 7 Amounts from line 4                                                                                                                                                                                               |          |          |          |          |          |           |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources                                                                                    |          |          |          |          |          |           |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on                                                                                                                |          |          |          |          |          |           |
| 10 Other income. Do not include gain or loss from the sale of capital assets. (Explain in Part IV.)                                                                                                                 |          |          |          |          |          |           |
| 11 <b>Total support.</b> Add lines 7 through 10                                                                                                                                                                     |          |          |          |          |          |           |
| 12 Gross receipts from related activities, etc. (see instructions)                                                                                                                                                  |          |          |          |          | 12       |           |
| 13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. ▶ <input type="checkbox"/> |          |          |          |          |          |           |

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

|                                                                                                                                                                                                                                                                                                                                                                                                                                          |    |   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---|
| 14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))                                                                                                                                                                                                                                                                                                                                                | 14 | % |
| 15 Public support percentage from 2008 Schedule A, Part II, line 14                                                                                                                                                                                                                                                                                                                                                                      | 15 | % |
| 16a <b>33-1/3 support test – 2009.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization. ▶ <input type="checkbox"/>                                                                                                                                                                       |    |   |
| b <b>33-1/3 support test – 2008.</b> If the organization did not check a box on line 13, or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization. ▶ <input type="checkbox"/>                                                                                                                                                                        |    |   |
| 17a <b>10%-facts-and-circumstances test – 2009.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ <input type="checkbox"/>    |    |   |
| b <b>10%-facts-and-circumstances test – 2008.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ <input type="checkbox"/> |    |   |
| 18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. ▶ <input type="checkbox"/>                                                                                                                                                                                                                                                                 |    |   |

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 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions and membership fees received (Do not include "unusual grants.")                                                                           | 24,805.  | 56,558.  | 16,830.  | 26,295.  | 27,175.  | 151,663.  |
| <b>2</b> 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 | 8,977.   | 8,905.   | 61,887.  | 72,650.  | 10,137.  | 162,556.  |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513                                                                           |          |          |          |          |          | 0.        |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf                                                                        |          |          |          |          |          | 0.        |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge                                                                |          |          |          |          |          | 0.        |
| <b>6 Total.</b> Add lines 1 through 5                                                                                                                                           | 33,782.  | 65,463.  | 78,717.  | 98,945.  | 37,312.  | 314,219.  |
| <b>7a</b> Amounts included on lines 1, 2, 3 received from disqualified persons                                                                                                  | 357.     | 0.       | 425.     | 0.       | 0.       | 782.      |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the amount on line 13 for the year                    | 0.       | 0.       | 0.       | 0.       | 0.       | 0.        |
| <b>c</b> Add lines 7a and 7b                                                                                                                                                    | 357.     | 0.       | 425.     | 0.       | 0.       | 782.      |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)                                                                                                                        |          |          |          |          |          | 313,437.  |

**Section B. Total Support**

| Calendar year (or fiscal yr beginning in) ▶                                                                                               | (a) 2005 | (b) 2006 | (c) 2007 | (d) 2008 | (e) 2009 | (f) Total |
|-------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6                                                                                                              | 33,782.  | 65,463.  | 78,717.  | 98,945.  | 37,312.  | 314,219.  |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | 203.     | 170.     | 83.      | 65.      |          | 521.      |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                          |          |          |          |          |          | 0.        |
| <b>c</b> Add lines 10a and 10b                                                                                                            | 203.     | 170.     | 83.      | 65.      | 0.       | 521.      |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on     |          |          |          |          |          | 0.        |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)                                 |          |          |          |          |          | 0.        |
| <b>13 Total support.</b> (add lns 9, 10c, 11, and 12.)                                                                                    |          |          |          |          |          | 314,740.  |

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐

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

|                                                                                                  |           |        |
|--------------------------------------------------------------------------------------------------|-----------|--------|
| <b>15</b> Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f)) | <b>15</b> | 99.6 % |
| <b>16</b> Public support percentage from 2008 Schedule A, Part III, line 15                      | <b>16</b> | 99.5 % |

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

|                                                                                                              |           |       |
|--------------------------------------------------------------------------------------------------------------|-----------|-------|
| <b>17</b> Investment income percentage for <b>2009</b> (line 10c, column (f) divided by line 13, column (f)) | <b>17</b> | 0.2 % |
| <b>18</b> Investment income percentage from <b>2008</b> Schedule A, Part III, line 17                        | <b>18</b> | 0.2 % |

**19a 33-1/3 support tests – 2009.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☒

**b 33-1/3 support tests – 2008.** If the organization did not check a box on line 14 or 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

**Part IV** **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.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed)

|                                                                                             |                                                                                                                                |                                |
|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
| Type or print<br><br>File by the extended due date for filing the return. See instructions. | Name of Exempt Organization                                                                                                    | Employer identification number |
|                                                                                             | ROSEN INSTITUTE                                                                                                                | 94-2898289                     |
|                                                                                             | Number, street, and room or suite number. If a P.O. box, see instructions.<br>Jay S. Schnyder, MS, EA<br>6152 Valley View Road | For IRS use only               |
|                                                                                             | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br>Oakland, CA 94611                  |                                |

**Check type of return to be filed** (File a separate application for each return)

|                                                 |                                                                      |                                      |                                    |
|-------------------------------------------------|----------------------------------------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-PF                                 | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (section 401(a) or 408(a) trust) | <input type="checkbox"/> Form 4720   | <input type="checkbox"/> Form 8870 |
| <input checked="" type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above)         | <input type="checkbox"/> Form 5227   |                                    |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

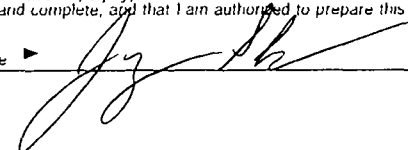
- The books are in care of **MARY KAY WRIGHT, TREASURER**  
Telephone No **510-845-6606** FAX No \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 4 I request an additional 3-month extension of time until 7/15, 20 11
- 5 For calendar year \_\_\_\_\_, or other tax year beginning 9/01, 20 09, and ending 8/31, 20 10
- 6 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension ORGANIZATION NEEDS ADDITIONAL TIME TO PREPARE ALL THE NECESSARY DOCUMENTS NEEDED TO COMPLETE THE TAX RETURN.

|                                                                                                                                                                                                                                            |              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| <b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                                                                 | <b>8a</b> \$ |
| <b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. | <b>8b</b> \$ |
| <b>c Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instrs.                    | <b>8c</b> \$ |

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature  Title Enrolled Agent Date 3/14/2011

BAA

FIFZ0502L 03/11/09

Form 8868 (Rev 4-2009)

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545 1709

Department of the Treasury  
Internal Revenue Service► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box. ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns*

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*

|                                                                                                           |                                                                                                                           |                                                     |
|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| <b>Type or print</b><br><br><small>File by the due date for filing your return. See instructions.</small> | Name of Exempt Organization<br><b>ROSEN INSTITUTE</b>                                                                     | Employer identification number<br><b>94-2898289</b> |
|                                                                                                           | Number, street, and room or suite number. If a P.O. box, see instructions.<br><b>1966 TICE VALLEY BLVD #235</b>           |                                                     |
|                                                                                                           | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>WALNUT CREEK, CA 94595</b> |                                                     |
|                                                                                                           |                                                                                                                           |                                                     |

**Check type of return to be filed** (file a separate application for each return)

|                                                 |                                                                      |                                    |
|-------------------------------------------------|----------------------------------------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                    | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (section 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input checked="" type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above)         | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-PF            | <input type="checkbox"/> Form 1041-A                                 | <input type="checkbox"/> Form 8870 |

- The books are in the care of ► MARY KAY WRIGHT, TREASURER

Telephone No ► 925-938-7754 FAX No ► \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 4/15, 20 11, to file the exempt organization return for the organization named above.  
The extension is for the organization's return for
- ☐ calendar year 20\_\_ or
  - ☒ tax year beginning 9/01, 20 09, and ending 8/31, 20 10

- 2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

|                                                                                                                                                                                                                               |                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| <b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                                                    | <b>3a</b> \$ 0. |
| <b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.                                               | <b>3b</b> \$ 0. |
| <b>c Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | <b>3c</b> \$ 0. |

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev 4-2009)

Client ROSEN-IN

ROSEN INSTITUTE

94-2898289

**Statement 1**  
**Form 990-EZ, Part I, Line 16**  
**Other Expenses**

|                           |    |                |
|---------------------------|----|----------------|
| AIRFARE                   | \$ | 6,019.         |
| BANK CHARGES              |    | 126.           |
| CERTIFICATE EXPENSES      |    | 2,285.         |
| CONFERENCES               |    | 3,646.         |
| CONSULTING                |    | 4,614.         |
| DIVERSITY TEAM EXPENSES   |    | 1,925.         |
| DUES & SUBS.              |    | 25.            |
| LICENCES AND PERMITS      |    | 29.            |
| LODGING                   |    | 250.           |
| MARY ROSEN FILM PROJECT   |    | 12,940.        |
| MEALS                     |    | 627.           |
| MISCEL                    |    | 20.            |
| Office Expenses           |    | 543.           |
| SOUTHWEST CENTER EXPENSES |    | 5,811.         |
| TELEPHONE                 |    | 977.           |
| TRANSPORTATION            |    | 850.           |
| WEB SITE/EMAIL            |    | 2,090.         |
| Total                     | \$ | <u>42,777.</u> |

**Statement 2**  
**Form 990-EZ, Part II, Line 24**  
**Other Assets**

|              | Beginning      | Ending         |
|--------------|----------------|----------------|
| SERVICE MARK | \$ 126.        | \$ 126.        |
| Total        | <u>\$ 126.</u> | <u>\$ 126.</u> |

**Statement 3**  
**Form 990-EZ, Part III**  
**Organization's Primary Exempt Purpose**

MAINTENANCE OF THE STANDARDS AND SERVICE MARK OF ROSEN METHOD WORLDWIDE.  
 SUSTAINS AND PROTECTS THE QUALITY STANDARDS FOR ROSEN METHOD.  
 ASSURES PUBLIC BENEFIT IN TERMS OF STANDARDS OF PRACTICE.

**Statement 4**  
**Form 990-EZ, Part III, Line 28**  
**Statement of Program Service Accomplishments**

MAINTENANCE OF THE STANDARDS AND SERVICE MARK OF ROSEN METHOD WORLDWIDE-SUSTAINS  
 AND PROTECTS THE QUALITY STANDARDS FOR ROSEN METHOD BY HOLDING THE SERVICE MARK IN  
 EACH COUNTRY WHERE ROSEN METHOD IS PRACTICED (CURRENTLY 14). ASSURES PUBLIC  
 BENEFIT IN TERMS OF STANDARDS OF PRACTICE.

Client ROSEN-IN

ROSEN INSTITUTE

94-2898289

**Statement 5**  
**Form 990-EZ, Part III, Line 29**  
**Statement of Program Service Accomplishments**

MARION ROSEN FILM PROJECT-DOCUMENTARY FILM RECORDING THE LIFE AND WORK OF MARION ROSEN AND THE DEVELOPMENT OF ROSEN METHOD BODY WORK AND MOVEMENT IN N. AMERICA AND EUROPE. BENEFITS HEALTH AWARENESS OF THE PUBLIC DOMAIN, PROVIDES INFORMATION FOR HEALTH SPECIALISTS AND FUTURE TRAINEES.

**Statement 6**  
**Form 990-EZ, Part IV**  
**List of Officers, Directors, Trustees, and Key Employees**

| <u>Name and Address</u>                                       | <u>Title and<br/>Average Hours<br/>Per Week Devoted</u> | <u>Compen-<br/>sation</u> | <u>Contri-<br/>bution to<br/>EBP &amp; DC</u> | <u>Expense<br/>Account/<br/>Other</u> |
|---------------------------------------------------------------|---------------------------------------------------------|---------------------------|-----------------------------------------------|---------------------------------------|
| MARY KAY WRIGHT<br>825 BANCROFT WAY<br>BERKELEY, CA 94710     | President/Treas<br>15.00                                | \$ 0.                     | \$ 0.                                         | \$ 0.                                 |
| MARIETTE BERINSTEIN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710 | Secretary<br>1.00                                       | 0.                        | 0.                                            | 0.                                    |
| SANDRA WOOTEN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710       | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| SARA WEBB<br>825 BANCROFT WAY<br>BERKELEY, CA 94710           | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| SUE BRENNER<br>825 BANCROFT WAY<br>BERKELEY, CA 94710         | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| ODILE ATTHALIN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710      | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| BILL SAMSEL<br>825 BANCROFT WAY<br>BERKELEY, CA 94710         | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| GLORIA HESSELLUND<br>825 BANCROFT WAY<br>BERKELEY, CA 94710   | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| BJORN OLSEN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710         | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |

Client ROSEN-IN

ROSEN INSTITUTE

94-2898289

**Statement 6 (continued)**  
**Form 990-EZ, Part IV**  
**List of Officers, Directors, Trustees, and Key Employees**

| <u>Name and Address</u>                                         | <u>Title and<br/>Average Hours<br/>Per Week Devoted</u> | <u>Compen-<br/>sation</u> | <u>Contri-<br/>bution to<br/>EBP &amp; DC</u> | <u>Expense<br/>Account/<br/>Other</u> |
|-----------------------------------------------------------------|---------------------------------------------------------|---------------------------|-----------------------------------------------|---------------------------------------|
| DEBORAH MARKS<br>825 BANCROFT WAY<br>BERKELEY, CA 94710         | Director<br>0                                           | \$ 0.                     | \$ 0.                                         | \$ 0.                                 |
| MARION ROSEN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710          | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| MATE GROSS<br>825 BANCROFT WAY<br>BERKELEY, CA 94710            | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| ROSIE KING<br>825 BANCROFT WAY<br>BERKELEY, CA 94710            | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| JULIANNE KNOOP<br>825 BANCROFT WAY<br>BERKELEY, CA 94710        | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| TRUDE SELIG<br>825 BANCROFT WAY<br>BERKELEY, CA 94710           | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| ANNIKA MINNBERGH<br>825 BANCROFT WAY<br>BERKELEY, CA 94710      | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| INGRID-MARIE NORDGREN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710 | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| TAINA HAMALAINEN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710      | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| LYNDA NAPIER<br>825 BANCROFT WAY<br>BERKELEY, CA 94710          | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| OLGA KOMISSAROVA<br>825 BANCROFT WAY<br>BERKELEY, CA 94710      | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
| OLA LINDEN<br>825 BANCROFT WAY<br>BERKELEY, CA 94710            | Director<br>0                                           | 0.                        | 0.                                            | 0.                                    |
|                                                                 | Total                                                   | \$ 0.                     | \$ 0.                                         | \$ 0.                                 |

2009

Federal Statements

Page 4

Client ROSEN-IN

ROSEN INSTITUTE

94-2898289

**Statement 7**

**Form 990-EZ, Part V**

**Regarding Transfers Associated with Personal Benefit Contracts**

(a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

No

(b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

No