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2010

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2010 calendar year, or tax year beginning 01-01-2010, and ending 12-31-2010

B Check if applicable

C Name of organization
APPLETON-OSHKOSH ELECTRICAL WORKERS
JOINT APPRENTICESHIP TRAINING COMMITTEE

Number and street (or P O box, if mail is not delivered to street address)	Room/suite
2730 DAIRY DR NO 102	

City or town, state or country, and ZIP + 4
MADISON, WI 537186882

D Employer identification number

93-0815385

E Telephone number

(608) 221-3321

F Group Exemption
Number

G Accounting method ☒ Cash ☐ Accrual Other (specify) ☐ _____

I Website:  N/A

J Tax-Exempt status(check only one)— ☐ 501(c)(3) ☒ 501(c)(5) ☐ (insert no) ☐ 4947(a)(1) or ☐ 527

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

K Check  If the organization is not a section 509(a)(3) supporting organization **and** its gross receipts are normally **not** more than \$50,000 A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions) But if the organization chooses to file a return, be sure to file a complete return

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, line 25, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. \$ 106,239

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

Check if the organization used Schedule O to respond to any question in this Part I ☒

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	
	2	Program service revenue including government fees and contracts	2	17,115
	3	Membership dues and assessments	3	88,968
	4	Investment income	4	156
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less cost or other basis and sales expenses	5b	
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
	6	Gaming and fundraising events		
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b	Gross income from fundraising events (not including \$ _ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceed \$15,000)		
	c	Less direct expenses from gaming and fundraising events	6c	
	d	Net income or (loss) from gaming and fundraising events (Add lines 6a and 6b and subtract line 6c)	6d	
	7a	Gross sales of inventory, less returns and allowances	7a	
Expenses	b	Less cost of goods sold	7b	
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
	8	Other revenue (describe in Schedule O)	8	
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	106,239
	10	Grants and similar amounts paid (list in Schedule O)	10	
	11	Benefits paid to or for members	11	45,522
	12	Salaries, other compensation, and employee benefits	12	
	13	Professional fees and other payments to independent contractors	13	15,300
	14	Occupancy, rent, utilities, and maintenance	14	925
	15	Printing, publications, postage, and shipping	15	
	16	Other expenses (describe in Schedule O)	16	42,684
	17	Total expenses. Add lines 10 through 16	17	104,431
	Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18
19		Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	90,076
20		Other changes in net assets or fund balances (explain in Schedule O)	20	0
21		Net assets or fund balances at end of year Combine lines 18 through 20	21	91,884

Part II Balance Sheets

Check if the organization used Schedule O to respond to any question in this Part II

(See the instructions for Part II)		(A) Beginning of year	(B) End of year	
22	Cash, savings, and investments	90,076	22	91,884
23	Land and buildings		23	
24	Other assets (describe in Schedule O)		24	
25	Total assets	90,076	25	91,884
26	Total liabilities (describe in Schedule O)	0	26	0
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	90,076	27	91,884

Part III Statement of Program Service Accomplishments

Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose?		Expenses	
A TRUST FUND THAT SUPPORTS A PROGRAM FOR TRAINING AND EDUCATION OF APPRENTICE ELECTRICIANS AND JOURNEYWORKER ELECTRICIANS IN THE AREA COVERED BY THE COLLECTIVE BARGAINING AGREEMENT		(Required for section 501 (c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others)	
Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title			
28 THE TRUST FUND PROVIDED PROGRAMS FOR THE EDUCATION AND TRAINING OF PARTICIPANTS, APPRENTICES, JOURNEYWORKER ELECTRICIANS, AND ALL OTHER ELECTRICIAN CLASSIFICATIONS THAT ARE COVERED BY THE COLLECTIVE BARGAINING AGREEMENT. TRAINING WAS PROVIDED FOR APPROXIMATELY 34 APPRENTICES AND 324 JOURNEYWORKERS DURING THE YEAR. THE TRUST FUND ALSO PROVIDED TRAINING TO THREE INSTRUCTORS THROUGH INSTRUCTOR IMPROVEMENT COURSES. (Grants \$ 0) If this amount includes foreign grants, check here		28a	0
29 (Grants \$) If this amount includes foreign grants, check here		29a	
30 (Grants \$) If this amount includes foreign grants, check here		30a	
31 Other program services (describe in Schedule O) (Grants \$) If this amount includes foreign grants, check here		31a	
32 Total program service expenses (add lines 28a through 31a)		32	

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.)

Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-.)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
See Additional Data Table				

Part V

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

Check if the organization used Schedule O to respond to any question in this Part V ☐

		Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O	33	No
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)	34	No
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, explain in Schedule O why the organization did not report the income on Form 990-T		
a	Did the organization have unrelated business gross income of \$1,000 or more or was it a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements?	35a	No
b	If "Yes," has it filed a tax return on Form 990-T for this year? (see instructions)	35b	
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36	No
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ☐ 37a 0		
b	Did the organization file Form 1120-POL for this year?	37b	
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a	No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	
39	Section 501(c)(7) organizations. Enter		
a	Initiation fees and capital contributions included on line 9	39a	
b	Gross receipts, included on line 9, for public use of club facilities	39b	
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under section 4911 ☐ , section 4912 ☐ , section 4955 ☐		
b	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b	
c	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ☐		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization ☐		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e	No
41	List the states with which a copy of this return is filed ☐		
42a	The organization's books are in care of ☐ GABRIELLE THOMAS Telephone no ☐ (608) 221-3321 2730 DAIRY DR STE 102 Located at ☐ MADISON, WI ZIP + 4 ☐ 537186882		
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)? 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 .	42b	No
c	At any time during the calendar year, did the organization maintain an office outside of the U S ? If "Yes," enter the name of the foreign country ☐	42c	No
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here ☐ ☐ and enter the amount of tax-exempt interest received or accrued during the tax year ☐ 43		
44a	Did the organization maintain any donor advised funds? If "Yes", Form 990 must be completed instead of Form 990-EZ.	44a	No
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44b	No
c	Did the organization receive any payments for indoor tanning services during the year?	44c	No
d	If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	44d	

		Yes	No
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R must be completed instead of Form990-EZ		No
45a	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R must be completed instead of Form990-EZ		No
46	Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		No

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 47-49b and 52.

Check if the organization used Schedule O to respond to any question in this Part VI

	Yes	No
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	
48	Is the organization a school 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?	
49b	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 & deferred compensation	(e) Expense account and other allowances

50(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

51(d) Total number of other independent contractors each receiving over \$100,000

52 Did the organization complete Schedule A? **NOTE:** All Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A

☒ Yes☐ No

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

Sign Here	***** Signature of officer		2011-04-12 Date		
	MIKE BALTHAZOR CHAIR Type or print name and title				
Paid Preparer's Use Only	Preparer's signature	GLENN MILLER CPA	Date	Check if self-employed ☒	Preparer's taxpayer identification number (See instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4	WEGNER LLP 2110 LUANN LN MADISON, WI 537133098			EIN
					Phone no (608) 274-4020

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

☒ Yes☐ No

Additional Data

Software ID:
Software Version:
EIN: 93-0815385
Name: APPLETON-OSHKOSH ELECTRICAL WORKERS
JOINT APPRENTICESHIP TRAINING COMMITTEE

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

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-.)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
MIKE BALTHAZOR 2730 DAIRY DR STE 102 MADISON,WI 537186882	CHAIRMAN 1 00	0	0	0
STEVE WILLISON 2730 DAIRY DR STE 102 MADISON,WI 537186882	SECRETARY 1 00	0	0	0
ZEBULAN GREEN 2730 DAIRY DR STE 102 MADISON,WI 537186882	TRUSTEE 1 00	0	0	0
TODD REMTER 2730 DAIRY DR STE 102 MADISON,WI 537186882	TRUSTEE 1 00	0	0	0
ERIC WRAGE 2730 DAIRY DR STE 102 MADISON,WI 537186882	TRUSTEE 1 00	0	0	0
DAN RICKEL 2730 DAIRY DR STE 102 MADISON,WI 537186882	ALTERNATE TRUSTEE 1 00	0	0	0
GERALD SCHULTZ 2730 DAIRY DR STE 102 MADISON,WI 537186882	TRUSTEE 1 00	0	0	0
GREG YOUNG 2730 DAIRY DR STE 102 MADISON,WI 537186882	TRUSTEE 1 00	0	0	0
BRIAN WENDT 2730 DAIRY DR STE 102 MADISON,WI 537186882	ALTERNATE TRUSTEE 1 00	0	0	0
TERRY BOCK 2730 DAIRY DR STE 102 MADISON,WI 537186882	ALTERNATE TRUSTEE 1 00	0	0	0

SCHEDULE O

(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

OMB No 1545-0047

2010

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Inspection

Name of the organization APPLETON-OSHKOSH ELECTRICAL WORKERS JOINT APPRENTICESHIP TRAINING COMMITTEE	Employer identification number 93-0815385
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Identifier	Return Reference	Explanation
OTHER INVESTMENT INCOME	FORM 990-EZ, PART I, LINE 4	INTEREST INCOME 156

Identifier	Return Reference	Explanation
OTHER EXPENSES	FORM 990-EZ, PART I, LINE 16	DESCRIPTION TUITION AND BOOK ASSISTANCE AMOUNT 2,689 DESCRIPTION OTHER TRAINING EXPENSES AMOUNT 1,800 DESCRIPTION INTERVIEW/RECRUITMENT EXPENSES AMOUNT 2,080 DESCRIPTION POST-PROGRAM EXPENSES AMOUNT 658 DESCRIPTION ADMINISTRATIVE EXPENSES AMOUNT 4,417 DESCRIPTION BOOKS PURCHASED AMOUNT 31,040 TOTAL TO FORM 990-EZ, LINE 16 42,684