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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation RESEARCH INSTITUTE FOR HAWAIIUSA		A Employer identification number 99-0355824	
Number and street (or P O box number if mail is not delivered to street address) 55 MERCHANT ST RM/STE 2020		B Telephone number (see instructions) (808) 591-1912	
City or town, state or province, country, and ZIP or foreign postal code HONOLULU, HI 96813		C If exemption application is pending, check here ▶ ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 41,990		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐	
J Accounting method ☐ Cash ☒ Accrual Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	294,424			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2) . . .				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	294,424	0		
	13 Compensation of officers, directors, trustees, etc	80,107			45,584
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	25,027			12,514
	16a Legal fees (attach schedule).	7,764			
	b Accounting fees (attach schedule).	17,314			12,986
	c Other professional fees (attach schedule)	65,345			65,345
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .				
	19 Depreciation (attach schedule) and depletion . . .	8,434			
	20 Occupancy	46,901			46,901
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	22,026			18,493
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	272,918	0		201,823
	25 Contributions, gifts, grants paid	4,200			4,200
	26 Total expenses and disbursements. Add lines 24 and 25	277,118	0		206,023
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	17,306			
	b Net investment income (if negative, enter -0-)		0		
	c Adjusted net income (if negative, enter -0-) . . .				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	9,928	24,351	24,351
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	9,618	2,158	2,158
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ 118,132 Less accumulated depreciation (attach schedule) ▶ _____ 112,700	13,866	5,432	5,432
15	Other assets (describe ▶ _____)	5,049	10,049	10,049	
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	38,461	41,990	41,990	
Liabilities	17	Accounts payable and accrued expenses	18,046	4,269	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities(add lines 17 through 22)	18,046	4,269	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	20,415	37,721	
	30	Total net assets or fund balances(see instructions)	20,415	37,721	
31	Total liabilities and net assets/fund balances(see instructions)	38,461	41,990		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	20,415
2	Enter amount from Part I, line 27a	2	17,306
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	37,721
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	37,721

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1a				
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
a			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	191,075	47,425	4 028993
2013	430,734	74,827	5 756398
2012	1,337,763	7,902	169 29422
2011	1,136,544	32,996	34 444902
2010	978,046	34,620	28 250895

2	Total of line 1, column (d).	2	241 77541
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	48 355083
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	17,255
5	Multiply line 4 by line 3.	5	834,367
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	
7	Add lines 5 and 6.	7	834,367
8	Enter qualifying distributions from Part XII, line 4.	8	206,023

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter _____
(attach copy of letter if necessary—see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

3 Add lines 1 and 2.

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-

6 Credits/Payments

a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868).	6c	
d	Backup withholding erroneously withheld	6d	

7 Total credits and payments Add lines 6a through 6d.

8 Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed** ➤

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**. ➤

11 Enter the amount of line 10 to be **Credited to 2015 estimated tax** ➤ **Refunded** ➤

1	0
2	
3	
4	
5	
7	
8	
9	
10	
11	

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file **Form 1120-POL** for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year
(1) On the foundation ▶ \$ _____ **(2)** On foundation managers ▶ \$ _____

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If "Yes," attach a detailed description of the activities.

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on **Form 990-T** for this year?

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T.

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either

- By language in the governing instrument, or
- By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

7 Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*

8a Enter the states to which the foundation reports or with which it is registered (see instructions)
▶ HI _____

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation.*

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? *If "Yes," complete Part XIV*

10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*

	Yes	No
1a		No
1b		No
1c		No
2		No
3		No
4a		No
4b		
5		No
6	Yes	
7	Yes	
8b	Yes	
9	Yes	
10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ RIHIUSA.ORG	13	Yes	
14	WR CONSULTING INC The books are in care of ▶ DBA WR FINANCIAL Telephone no ▶ (808) 591-9959 Located at ▶ 615 PIKOI STREET SUITE 1509 HONOLULU HI ZIP+4 ▶ 96814			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☒ Yes ☐ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes

☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes

☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes

☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

☐ Yes

☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes

☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

☐ Yes

☒ No

Organizations relying on a current notice regarding disaster assistance check here.

☐ Yes

☒ No

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes

☒ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

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

☐ Yes

☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes

☒ No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes

☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

☐ Yes

☒ No

5b

6b

No

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CHRISTOPHER HAIG 4348 WAIALAE AVENUE PMB 375 HONOLULU, HI 96816	PRE/CEO /DIRE 20 00	0	5,892	0
JULIE MOLLOY 1001 WILDER AVE APT 205 HONOLULU, HI 96822	SEC /EXEC A 30 00	80,107	11,060	3,589

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total

number of other employees paid over \$50,000.

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SUMMARY OF DIRECT CHARITABLE ACTIVITIES PART IX-A - PRIVATE OPERATING FOUNDATION'S CHARITABLE ACTIVITIES OF US IRC 4942(J)(3) THE RESEARCH INSTITUTE FOR HAWAII USA'S (RIHI USA) MISSION IS TO CONDUCT RESEARCH AND REVIEW US LITERARY DISCOVERIES IN THE HISTORY OF UNITED STATES CONSTITUTIONAL CIVIC PROGRESS THE FOUNDATION ALSO COORDINATES, SPONSORS AND SUPPORTS A SELECT GROUP OF CONFERENCES AND EDUCATIONAL EVENTS IN HAWAII THESE INCLUDE LECTURES, SYMPOSIUMS, WORKSHOPS, PUBLIC FORUMS AND RECOGNITION AWARD PRESENTATIONS THESE PROGRAMS INFORM OUR CITIZENS ABOUT THE ROLE OF CONSTITUTIONAL GOVERNMENT AND ITS IMPORTANCE IN THEIR LIVES DURING 2015, RIHI USA ACTIVITIES INCLUDED RESEARCH AND EDITING OF SEVERAL HISTORICAL PUBLICATIONS IN ADVANCE OF RE-PUBLICATION ONGOING WORK ON NEW PUBLICATIONS AND SCHOLARLY PAPERS WERE UPLOADED TO THE WEBSITE, SEVERAL OF WHICH ARE BEING EDITED FOR PUBLICATION THE FOUNDATION CONTINUES TO ENCOURAGE AND SUPPORT OTHER NONPROFIT INSTITUTIONS IN HAWAII WHO HAVE SI	206,023
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	

Part X

Minimum Investment Return

(All domestic foundations must complete this part. Foreign foundations,see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	17,518
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	17,518
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	17,518
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	263
5	Net value of noncharitable-use assets.Subtract line 4 from line 3 Enter here and on Part V, line 4	5	17,255
6	Minimum investment return.Enter 5% of line 5.	6	863

Part XI

Distributable Amount

(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amountas adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	206,023
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions.Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	206,023
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions.Subtract line 5 from line 4.	6	206,023

Note:The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 206,023				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2015 distributable amount.				
e Remaining amount distributed out of corpus	206,023			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	206,023			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.				
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section ☒ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	
0			28	28
			24	24
206,023	191,075	430,734	1,337,763	2,165,595
4,200	5,650	17,700	61,690	89,240
201,823	185,425	413,034	1,276,073	2,076,355

85% of line 2a

c

Qualifying distributions from Part XII, line 4 for each year listed

206,023

d

Amounts included in line 2c not used directly for active conduct of exempt activities

4,200

e

Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c

201,823

3

Complete 3a, b, or c for the alternative test relied upon

a

"Assets" alternative test—enter

(1)

Value of all assets

154,690

(2)

Value of assets qualifying under section 4942(j)(3)(B)(i)

154,690

b

"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c

"Support" alternative test—enter

(1)

Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2)

Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3)

Largest amount of support from an exempt organization

(4)

Gross investment income

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

The name, address, and telephone number or email address of the person to whom applications should be addressed

b

The form in which applications should be submitted and information and materials they should include

c

Any submission deadlines

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Form 990-PF (2015)

Part XV

Supplementary Information(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> NAVY LEAGUE OF THE US HONOLULU COU PO BOX 31032 HONOLULU, HI 96818	NONE	PC	GENERAL SUPPORT	600
HISTORY EDUCATION HAWAII INC PO BOX 183 HONOLULU, HI 968100183	NONE		GENERAL SUPPORT	1,500
COAST GUARD FOUNDATION PO BOX 235480 HONOLULU, HI 96823	NONE		GENERAL SUPPORT	600
AFP ALOHA CHAPTER PO BOX 11899 HONOLULU, HI 96828	NONE		GENERAL SUPPORT	1,500
Total			3a	4,200
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

13 Total.Add line 12, columns (b), (d), and (e). **13**_____

(See worksheet in line 13 instructions to verify calculations)

[illegible]

TY 2015 Accounting Fees Schedule

Name: RESEARCH INSTITUTE FOR HAWAIIUSA

EIN: 99-0355824

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BOOKKEEPING & TAX PREPARATION	17,314			12,986

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Depreciation Schedule

Name: RESEARCH INSTITUTE FOR HAWAIIUSA

EIN: 99-0355824

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
PASTIME SOFTWARE	2006-01-13	3,711	3,711	S/L	3 0000				
QUICKBOOKS PRO FOR MAC	2007-01-14	188	188	S/L	3 0000				
FTB SOFTWARE/FILEMAKER	2007-05-30	884	884	S/L	3 0000				
FTP SOFTWARE	2007-07-06	63	63	S/L	3 0000				
NEATRECEIPTS SCANALIZER	2007-07-25	329	329	S/L	3 0000				
LEOPARD SOFTWARE	2007-10-31	136	136	S/L	3 0000				
SOFTWARE	2007-12-07	1,063	1,063	S/L	3 0000				
SOFTWARE	2007-12-20	3,004	3,004	S/L	3 0000				
SOFTWARE	2008-04-29	471	471	S/L	3 0000				
SOFTWARE	2008-06-12	2,110	2,110	S/L	3 0000				
SOFTWARE	2008-06-13	188	188	S/L	3 0000				
SOFTWARE	2008-12-16	376	376	S/L	3 0000				
QUICKBOOKS	2009-12-07	1,156	1,156	S/L	3 0000				
3 DSS PLAYER SOFTWARE	2010-06-03	408	408	S/L	3 0000				
EXCEL 2007	2010-06-08	271	271	S/L	3 0000				
PARALLELS 5 0	2010-06-30	105	105	S/L	3 0000				
MS OFFICE 2011	2010-11-15	251	251	S/L	3 0000				
4 PARALLELS	2010-11-15	542	542	S/L	3 0000				
3 PARALLELS	2010-12-17	313	313	S/L	3 0000				
3 INSPIRATION, INSPIRATION	2010-12-17	1,726	1,726	S/L	3 0000				

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
2 MS OFFICE 2011	2010-12-17	523	523	S/L	3 0000				
3 PROJECT X	2010-12-17	534	534	S/L	3 0000				
808 SUPPORT	2011-02-08	471	471	S/L	3 0000				
808 SUPPORT	2011-04-01	554	554	S/L	3 0000				
808 SUPPORT	2011-04-21	376	376	S/L	3 0000				
808 SUPPORT	2011-04-28	105	105	S/L	3 0000				
808 SUPPORT	2011-05-12	535	535	S/L	3 0000				
808 SUPPORT	2011-06-14	792	792	S/L	3 0000				
808 SUPPORT	2011-08-31	327	327	S/L	3 0000				
PERFORMANCE SOLUTION	2011-09-07	750	750	S/L	3 0000				
808 SUPPORT	2011-10-04	376	376	S/L	3 0000				
808 SUPPORT	2011-10-14	2,209	2,209	S/L	3 0000				
808 SUPPORT	2011-11-29	208	208	S/L	3 0000				
808 SUPPORT	2011-12-14	325	325	S/L	3 0000				
COMPUTER WORK CTR-EX DES	2003-06-13	277	277	S/L	7 0000				
TREO PDA WIRELESS	2006-01-19	158	158	S/L	5 0000				
OFFICE FURNITURE	2006-10-30	3,800	3,800	S/L	5 0000				
COMPUTER EQUIPMENT	2006-10-30	5,724	5,724	S/L	5 0000				
FURNITURE	2007-07-31	393	393	S/L	7 0000				
DIGITAL CAMERA	2007-08-22	320	320	S/L	5 0000				

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTER ACCESSORIES	2007-10-31	283	283	S/L	5 0000				
EQUIPMENT	2007-12-07	2,286	2,286	S/L	5 0000				
MACBOOK	2007-12-20	4,090	4,090	S/L	5 0000				
MACBOOK	2007-12-20	515	515	S/L	5 0000				
TELEPHONE	2008-01-15	544	544	S/L	5 0000				
PRINTER	2008-01-25	448	448	S/L	5 0000				
COMPUTERS	2008-05-01	1,489	1,489	S/L	5 0000				
500GB EXTERNAL HARD DRIVE	2008-05-21	272	272	S/L	5 0000				
2GB DDR2	2008-06-13	105	105	S/L	5 0000				
IPOD	2008-06-13	834	834	S/L	5 0000				
NOTEBOOK	2008-07-08	838	838	S/L	5 0000				
APPLE TIME CAPSULE	2008-07-08	517	517	S/L	5 0000				
OLYMPUS DS-5000 DIG RECO	2008-10-23	471	471	S/L	5 0000				
OLYMPUS AS-500 DIG TRAN	2008-10-23	330	330	S/L	5 0000				
COMPUTER	2009-01-07	500	500	S/L	5 0000				
DIGITAL RECORDER	2009-08-19	677	677	S/L	5 0000				
PRINTER	2009-10-20	209	209	S/L	5 0000				
ELECTRONIC CHECK WRITER	2009-10-22	375	375	S/L	5 0000				
MACBOOK	2009-11-18	1,989	1,989	S/L	5 0000				
3 HANDHELD RECORDERS	2009-11-18	311	311	S/L	5 0000				

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
CHAIR	2009-11-20	136	99	S/L	7 0000	19			
2GHZ DUEL COREK, 2G RAM	2010-03-10	681	658	S/L	5 0000	23			
2 APPLE 24" DISPLAY	2010-05-17	2,304	2,112	S/L	5 0000	192			
INTRA-WEB SERVER	2010-05-17	17,996	16,496	S/L	5 0000	1,500			
2 DELL ADAMO PEARL	2010-06-03	5,236	4,799	S/L	5 0000	437			
MACBOOK PRO 15	2010-07-14	3,202	2,881	S/L	5 0000	321			
MACBOOK PRO	2010-10-03	1,692	1,438	S/L	5 0000	254			
PHONE	2010-10-06	340	289	S/L	5 0000	51			
PHONE	2010-11-03	338	282	S/L	5 0000	56			
AIRPORT EXTREME BASE STAT	2010-11-15	229	191	S/L	5 0000	38			
2 AIRPORT EXTREME 2/TIME	2010-11-15	1,256	1,047	S/L	5 0000	209			
MACBOOK PRO 15	2011-04-26	4,981	3,653	S/L	5 0000	996			
256GB SSD HARD DRIVE	2011-06-03	728	522	S/L	5 0000	146			
DESKTOP COMPUTER	2011-07-06	832	583	S/L	5 0000	166			
1 5TB EXTERNAL HD	2011-08-12	188	129	S/L	5 0000	37			
2X MACBOOK AIR 2/SUPERDRIVE	2011-08-18	5,491	3,661	S/L	5 0000	1,098			
CISCO ASA 5505	2011-10-14	1,703	1,107	S/L	5 0000	340			
1 5 TB HD	2011-10-27	237	150	S/L	5 0000	47			
SWITCH, FAX ADAPTER, 6-LINE PHONE	2011-12-14	1,029	635	S/L	5 0000	206			
COMPUTER EQUIPMENT	2012-11-20	4,858	2,024	S/L	5 0000	972			

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
808 SUPPORT	2011-07-28	377	377	S/L	3 0000				
808 SUPPORT	2011-09-13	368	368	S/L	3 0000				
SOFTWARE	2008-05-19	375	375	S/L	3 0000				
JULIE'S LAPTOP	2012-03-02	639	362	S/L	5 0000	128			
(2) GATEWAY WHITE LAPTOPS	2012-06-01	1,149	593	S/L	5 0000	230			
MS OFFICE, SYMANTEC	2012-06-07	708	610	S/L	3 0000	98			
COMPUTER	2012-07-25	3,454	1,670	S/L	5 0000	691			
FLAT SCREEN MONITOR	2012-09-05	365	171	S/L	5 0000	73			
LEXIS NEXIS (2-YEARS)	2012-10-16	3,515	3,515	S/L	2 0000				
PRINTER	2014-09-02	204	122	S/L	5 0000	41			
SOFTWARE	2014-09-10	386	214		3 0000	65			

TY 2015 Land, Etc. Schedule

Name: RESEARCH INSTITUTE FOR HAWAIIUSA

EIN: 99-0355824

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	82,417	76,985	5,432	5,432
FURNITURE	4,606	4,606		
SOFTWARE	31,109	31,109		

TY 2015 Legal Fees Schedule

Name: RESEARCH INSTITUTE FOR HAWAIIUSA

EIN: 99-0355824

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LITIGATION	7,654			
OTHER LEGAL FEES	110			

TY 2015 Other Assets Schedule

Name: RESEARCH INSTITUTE FOR HAWAIIUSA

EIN: 99-0355824

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SECURITY DEPOSIT	5,049	5,049	5,049
PUBLIC RELATIONS DEPOSIT		5,000	5,000

TY 2015 Other Expenses Schedule

Name: RESEARCH INSTITUTE FOR HAWAIIUSA

EIN: 99-0355824

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK SERVICE CHARGES	39			39
COMPUTER SERVICE/MAINTENANCE	6,466			6,466
INSURANCE	2,653			2,653
DUES	457			457
PARKING	3,169			1,585
POSTAGE	133			133
PROFESSIONAL DEVELOPMENT	2,440			2,440
LICENSE & PERMITS	17			17
OFFICE SUPPLIES & EXPENSES	2,626			1,313
EMPLOYEE LEASING	712			712
TELEPHONE	1,221			611
PRINTING & PUBLICATIONS	137			137
PAYROLL FEES	52			26
SMALL OFFICE EQUIPMENT	1,904			1,904

TY 2015 Other Professional Fees Schedule**Name:** RESEARCH INSTITUTE FOR HAWAIIUSA**EIN:** 99-0355824

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING	20,867			20,867
DIGITAL IMAGING	38,655			38,655
COMPUTER CONSULTING	750			750
PUBLIC RELATIONS	5,073			5,073

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>.	OMB No 1545-0047
		2015

Name of the organization RESEARCH INSTITUTE FOR HAWAIIUSA	Employer identification number 99-0355824
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization RESEARCH INSTITUTE FOR HAWAIIUSA	Employer identification number 99-0355824
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHRISTOPHER HAIG	\$ 294,424	Person ☒
	PMB 375 4348 WAIALAE AVENUE		Payroll ☐
	HONOLULU, HI96816		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number
99-0355824

Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Employer identification number
99-0355824

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
--			
-			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
--			
-			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
--			
-			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
--			
-			