Form **4720**

Return of Certain Excise Taxes on Charities and Other Persons Under Chapters 41 and 42 of the Internal Revenue Code

Department of the Treasury Internal Revenue Service 42 of the Internal Revenue Code
(Sections 170(f)(10), 4911, 4912, 4941, 4942, 4943, 4944, 4945, 4955, and 4958)

See separate instructions.

OMB No. 1545-0052

2001

City or town, state, and ZIP code Form 900 Form Form 900 Form Form 900 Form 900 Form Form 900 Form Form 900 Form Form 5227		endar year 2001 or other tax year begin	ning		, 2001, and ending				
City or town, state, and 7/P code	Name o	of foundation or public charity				Em	ployer identification :	numbe	ər
City or town, state, and 7/P code com 940	Numbe	r, street, and room or suite no. (or P.O.	box if mail is	not delivered to street addre	ess)	Che	: eck box for type of ar	nnual re	eturn:
A Is the organization a foreign private foundation within the meaning of section 4948(b)? B Has corrective action been taken on any taxable event that resulted in Chapter 42 taxes being reported on this form? (Enter "N/A" if not applicable) If "Yes," attach a detailed documentation and description of the corrective action taken and, if applicable, enter the fair value of any property recovered as a result of the correction ► Taxes on Organization (Sections 170(f)(10), 4911(a), 4942(a), 4943(a), 4943(a), 4944(a)(1), 4945(a)(1), 4945(a)(1				Form 9					
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a b c d Total Part II-B Summary of Taxes (See Tax Payments on page 2 of the instructions.) 1 Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,						(i) Total-	—Add cols. (c) throug	gh (h)	
b c d Total Part II-B Summary of Taxes (See Tax Payments on page 2 of the instructions.) 1 Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,		3333 11, 1 411 11, 601.	v-7		, , ,				
c d Total Part II-B Summary of Taxes (See Tax Payments on page 2 of the instructions.) 1 Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,									
Total Part II-B Summary of Taxes (See Tax Payments on page 2 of the instructions.) 1 Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,									
Part II-B Summary of Taxes (See Tax Payments on page 2 of the instructions.) 1 Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,									
Part II-B Summary of Taxes (See Tax Payments on page 2 of the instructions.) 1 Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,									
Enter the taxes listed in Part II-A, column (i), that apply to self-dealers, disqualified persons,		II D. Cupanamy of Tayer	Coo Tour)aumonta on non-	2 of the instruction	nc)			
	Part		See Iax F	ayments on page	∠ OF THE INSTRUCTION	15.)			
	1	Enter the taxes listed in Part II-	Column (i)	that apply to self-de-	alers disqualified no	rsons			
foundation managers, and organization managers who sign this form. If all sign, enter the									
total amount from Part II-A, column (i)	1	total amount from Part II-A, co	lumn (i) .			1			
2 Total tax. Add Part I, line 9, and Part II-B, line 1. (Make check(s) or money order(s) payable to the United States Treasury.)	2	Total tax. Add Part I, line 9, and	d Part II-B,	line 1. (Make check(s)	or money order(s) pa	ayable			

SCHEDULE A—Initial Taxes on Self-Dealing (Section 4941)

Par	t I Acts of Self	-Dealing a	nd Tax Comput	ation						
(a) Ao		(c) Description of act								
1										
2										
3										
5										
(d)	Question number from Fo Part VII-B, or Form 5227, applicable to the a	Part VI-B,	(e) Amount invo	olved in act	(f) Initial tax on self-dealing (5% of col. (e)))	(g) Tax on foundation managers (if applicable) (lesser of \$10,000 or 2½% of col. (e))			
Dor	HI Cummary o	f Tay Liabil	ity of Solf Dool	lore and Dro	ration of Payments					
Par	Summary o	I IAX LIADII	ity of Self-Deal		_		(d) Self-dealer's total tax			
	(a) Names of se	lf-dealers liable	or tax	(b) Act no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount		liability (add amounts in col. (c)) (see page 4 of the instructions)			
Par	t III Summary o	f Tax Liabil	ity of Foundati	on Managers	and Proration of Payr	nents	(d) Manager's total tax liability			
	(a) Names of founda	tion managers lia	able for tax	(b) Act no. from Part I, col. (a)	(c) Tax from Part I, col. (g) or prorated amount	ı	(add amounts in col. (c)) (see page 4 of the instructions)			
	SCH	EDULE B	—Initial Tax	on Undistr	ributed Income (Sec	ction	4942)			
		-			for 2001, Part XIII, line 6d)	1				
	Undistributed incom					2				
		ted income at end of current tax year beginning in 2001 and subject to tax 942 (add lines 1 and 2)								
4 Tax—Enter 15% of line 3 here and on page 1, Part I, line 1										

SCHEDULE C—Initial Tax on Excess Business Holdings (Section 4943)

D!	Litarialian and		0	- C T
business	HOIGINGS	and	Computation	oi lax

			_						
							a se	parate schedule	for each enterprise. Refer
			for each line item before	makir	ng any er	itries.		-	·
Nam	e and add	dress of business er	nterprise						
Emn	Jover ide	entification numbe	ır						
ιпρ	noyer ide	minication numbe				<u></u>	•	· · · · · ·	i
Forn	n of ente	rprise (corporatio	n, partnership, trust, joint	t ventu	ure. sole	proprietorshi	p. etc	c.) . >	
		(00.400	, ,					, -	
					Voti	(a) ng stock		(b)	(c) Nonvoting stock
				(profits inter		interest or		Value	(capital interest)
					benenc	cial interest)			
1	Founda	tion holdings in b	usiness enterprise	1		%		%	
						0/		0/	
2	Permitt	ed holdings in bus	siness enterprise	2		%		%	<i>(</i>
2	Volue e	f ayaasa baldinga	in business enterprise	3					
3 4		•	disposed of within 90						
7			excess holdings not						
			ax (attach explanation)	4					
5	Taxable	excess holdings i	n business enterprise—						
				5					
6		nter 5% of line 5		6					
7			n line 6, columns (a), (b), I on page 1, Part I, line 2	7					
					-		<u>//////</u>		(C. 1' AOAA)
SC	HEDU	LE D—Initiai	laxes on investme	ents	inat J	eopardize	Cn	aritable Pur	pose (Section 4944)
Pai	et I In	vestments and	Tax Computation						
G			- Tax Computation					I	I
(a) Ir	nvestment	(b) Date of	(a) December of in-			(d) Amount of investment		(e) Initial tax	(f) Initial tax on foundation managers (if applicable)—
	umber	investment	(c) Description of inv	estmen	ι			on foundation (5% of col. (d))	(lesser of \$5,000 or 5% of
	1								col. (d))
	2								
	3								
	4								
	5								
			and on page 1, Part I, lin						
iota	ı ı —colun	nn (f). Enter total (or prorated amount) here	e and	ın Part II,	column (c),	beio	N	
Par	t II S	ummary of Tax	Liability of Foundation	on Ma	anagers	and Prora	tion	of Payments	
					vestment	(c) Tay	from F	Part I, col. (f),	(d) Manager's total tax liability
	(a) N	ames of foundation ma	anagers liable for tax		om Part I, ol. (a)			d amount	(add amounts in col. (c)) (see page 6 of the instructions)

SCHEDULE E—Initial Taxes on Taxable Expenditures (Section 4945)

Part I	Expenditure	s and Computa	tion of Tax					
(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Na	me and address of	recipie	ent		of expenditure and purposes or which made
2								
3								
<u>4</u> 5								
		990-PF, Part VII-B, or ble to the expenditure	(g) Initi	al tax imposed on to (10% of col. (b))		tion		posed on foundation managers ser of \$5,000 or 21/2% of col. (b))
Total—copage 1,	column (g). Enter Part I, line 4	here and on						
below		total (or prorated						
Part II	Summary of	Tax Liability of	Foundation	T				(d) Manager's total tax liability
	(a) Names of found	dation managers liable	for tax	(b) Item no. from Part I, col. (a)	(art I, col. (h), or amount	(add amounts in col. (c)) (see page 7 of the instructions)
	SCHE	DULE F—Ini	tial Taxes	⊥ on Politica	l Ex	penditu	res (Section	⊥ ı 4955)
Part I	Expenditure	s and Computa	ition of Tax					
(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Description	of political expend	iture	organizati	tax imposed on on or foundation 6 of col. (b))	(f) Initial tax imposed on managers (if applicable) (lesser of \$5,000 or 2½% of col. (b))
1 2								
3 4								
5								
Total—	column (e). Enter	here and on page	e 1, Part I, line	5	•			
		total (or prorated						Proretion of Douments
Part II	(a) Names of c	organization managers managers liable for tax		(b) Item no. from Part I, col. (a)		(c) Tax from P	art I, col. (f), or amount	Proration of Payments (d) Manager's total tax liability (add amounts in col. (c)) (see page 7 of the instructions)

Form 4720 (2001) Page 5 SCHEDULE G—Tax on Excess Lobbying Expenditures (Section 4911) Excess of grassroots expenditures over grassroots nontaxable amount (from Schedule A (Form 1 990), Part VI-A, column (b), line 43). (See page 7 of the instructions before making entry.) 2 Excess of lobbying expenditures over lobbying nontaxable amount (from Schedule A (Form 990), 2 Part VI-A, column (b), line 44). (See page 7 of the instructions before making entry.) . 3 3 Taxable lobbying expenditures—enter the larger of line 1 or line 2 Tax—Enter 25% of line 3 here and on page 1, Part I, line 6 SCHEDULE H—Taxes on Disqualifying Lobbying Expenditures (Section 4912) Part I **Expenditures and Computation of Tax** (f) Tax imposed on organization managers (if applicable)— (5% of col. (b)) (a) Item (c) Date paid (e) Tax imposed on organization (b) Amount (d) Description of lobbying expenditures number or incurred (5% of col. (b)) 3 4 5 Total—column (e). Enter here and on page 1, Part I, line 7 Total—column (f). Enter total (or prorated amount) here and in Part II, column (c), below Summary of Tax Liability of Organization Managers and Proration of Payments (d) Manager's total tax liability (b) Item no. from (c) Tax from Part I, col. (f), or (a) Names of organization managers liable for tax (add amounts in col. (c)) Part I, col. (a) prorated amount (see page 7 of the instructions) SCHEDULE I—Initial Taxes on Excess Benefit Transactions (Section 4958) **Excess Benefit Transactions and Tax Computation** Part I (b) Date of

2				
3				
4				
5				
(d) Amount of excess benefit			(e) Initial tax on disqualified persons (25% of col. (d))	(f) Tax on organization managers (if applicable) (lesser of \$10,000 or 10% of col. (d))

(c) Description of transaction

Transaction

number

transaction

SCHEDULE I—Initial Taxes on Excess Benefit Transactions (Section 4958) Continued

Part II Summary of Tax Liability of Disqualif	ied Persons	and Proration of Payments	
(a) Names of disqualified persons liable for tax	(b) Trans. no. from Part I, col. (a)	(c) Tax from Part I, col. (e), or prorated amount	(d) Disqualified person's total tax liability (add amounts in col. (c)) (see page 8 of the instructions)
Part III Summary of Tax Liability of 501(c)(3)	& (4) Organi	zation Managers and Prorati	on of Pavments
(a) Names of 501(c)(3) & (4) organization managers liable for tax	(b) Trans. no. from Part I, col. (a)		(d) Manager's total tax liability (add amounts in col. (c)) (see page 8 of the instructions)
Under penalties of perjury, I declare that I have examined this return, t is true, correct, and complete. Declaration of preparer (other than ta			
Signature of officer or trustee		Title	Date
Signature (and organization name if applicable) of self-dealer, d	isqualified person	n, foundation manager, or organization m	anager Date
Signature (and organization name if applicable) of self-dealer, d	isqualified person	n, foundation manager, or organization m	anager Date
Signature (and organization name if applicable) of self-dealer, d	isqualified person	ı, foundation manager, or organization m	anager Date
Signature (and organization name if applicable) of self-dealer, d	isqualified person	n, foundation manager, or organization m	anager Date
Signature of individual or firm preparing the return			Date
Address of preparer		() F	Phone no. of preparer

