



ISA BLANKET FEDERAL TAX EXEMPTION QUESTIONNAIRE

INSTRUCTIONS

Please take a few moments today and complete the attached questionnaire that ISA Headquarters needs to include your Section under the Society's Blanket Tax Exemption.

Part I is a very short check list.

Part II is a request for somewhat more detailed information with supporting documentation. If one or two items are particularly difficult to obtain, return the part that is complete and forward the remaining item(s) soon afterwards.

Part III is a form authorizing Society Headquarters to submit information to IRS on your Section's behalf. Please sign the form as Section President, emboss your organizational seal (if available), and return the form to ISA Headquarters, Attention: Finance & Administration.

Your prompt attention will enable your Section to be added to the Society's blanket tax exemption quickly and efficiently. If you have any questions, telephone the Director, Finance & Administration at (919) 990-9435.

Thank you for your cooperation.

Attachment: Tax Questionnaire (Parts I, II & III)

PART II

1. Please furnish a copy of your current Articles of Incorporation or association, and a copy of your current Constitution and Bylaws.
2. Please furnish, for the most recent year available, a financial statement of your Section. (A statement or schedule of sources and amounts of income and nature and amounts of expenses will suffice.)
3. Please list briefly your major activities, together with a very brief description of each (one or two sentences per activity). Please furnish representative programs or brochures describing major educational activities.

Also check below the activities sponsored or engaged in during the last two years by your Section:

- (a) Lectures on technical subject? Yes (how many _____) No
If yes, were any lectures open to the public? Yes (how many _____) No
 - (b) Courses on technical subject of more than 4 hours? Yes (how many _____) No
 - (c) Publishing or distribution of technical books? Yes (how many _____) No
If yes, were members charged for books or pamphlets? Yes (how many _____) No
 - (d) Does your Section provide scholarships to students? Yes (how many _____) No
If yes, are scholarships limited to:
Section and ISA members or their families Yes (how many _____) No
Non-Members Yes No
 - (e) Does your Section sponsor or hold exhibits? Yes (how many _____) No
If yes, did exhibitors pay to participate? Yes No
Did exhibitors actively sell products at any exhibit? Yes (how many _____) No
 - (f) Did your Section sponsor a conference of instrumentation professionals?
Yes (how many _____) No
 - (g) Does your Section sponsor or participate in any joint educational projects with schools or colleges? Yes No
 - (h) Did your Section participate in development of standards and practices?
 Yes No
4. Please furnish a copy of any ruling or determination letter(s) that have been issued to you by the U.S. Internal Revenue Service describing your exemption from income tax or your status as a private foundation.

Signature:

Section President

Section Name: _____

Date:

PART III

ISA, The International Society of Automation is hereby authorized to include _____ [Name of Section] in its application to the Internal Revenue Service for a group ruling letter recognizing ISA and its Sections as exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code of 1954. In connection with this ruling request, ISA and its counsel are further authorized to submit information to the Internal Revenue Service on behalf of (Name of Section) to obtain disclosure of tax information regarding (Name of Section), and to perform all other acts necessary for a group ruling.

Section President _____

Name of Section _____

Date _____

(Corporate Seal If Applicable)