

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

- ▶ Do not enter social security numbers on this form as it may be made public.  
 ▶ Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**2014****Open to Public Inspection**Department of the Treasury  
Internal Revenue Service

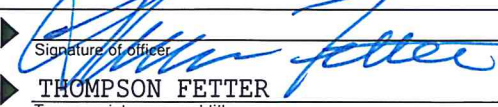
<b>A</b> For the 2014 calendar year, or tax year beginning <u>7/01</u> , 2014, and ending <u>6/30</u> , 2015																						
<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%; vertical-align: top;"> <b>C</b>            SAN DIEGO HISTORICAL SOCIETY            DBA SAN DIEGO HISTORY CENTER            1649 EL PRADO #3            SAN DIEGO, CA 92101         </td> <td style="width:40%; vertical-align: top;"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td><b>D</b> Employer identification number</td> <td>95-1728991</td> </tr> <tr> <td><b>E</b> Telephone number</td> <td>(619) 232-6203</td> </tr> <tr> <td><b>G</b> Gross receipts \$</td> <td>3,824,612.</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <b>F</b> Name and address of principal officer: <u>CHARLOTTE CAGAN</u>            SAME AS C ABOVE         </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:40%;"> <b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ▶ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527         </td> <td> <b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No            If 'No,' attach a list. 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**Part I Summary**

<b>Activities &amp; Governance</b>	1 Briefly describe the organization's mission or most significant activities: <u>REACHING OVER 150,000 SAN DIEGANS ANNUALLY, THE SAN DIEGO HISTORY CENTER TELLS THE DIVERSE STORY OF OUR REGION - PAST, PRESENT AND FUTURE - EDUCATING AND ENRICHING OUR COMMUNITY, PRESERVING OUR HISTORY AND FOSTERING CIVIC PRIDE.</u>			
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.			
	3 Number of voting members of the governing body (Part VI, line 1a).....	<u>3</u>		22
	4 Number of independent voting members of the governing body (Part VI, line 1b).....	<u>4</u>		22
	5 Total number of individuals employed in calendar year 2014 (Part V, line 2a).....	<u>5</u>		50
	6 Total number of volunteers (estimate if necessary).....	<u>6</u>		181
	7a Total unrelated business revenue from Part VIII, column (C), line 12.....	<u>7a</u>		69,097.
	b Net unrelated business taxable income from Form 990-T, line 34.....	<u>7b</u>		4,771.
<b>Revenue</b>	8 Contributions and grants (Part VIII, line 1h).....	Prior Year		Current Year
	9 Program service revenue (Part VIII, line 2g).....	1,872,632.		2,742,694.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d).....	388,193.		601,217.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e).....	9,530.		-26,646.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12).....	134,329.		279,125.
		2,404,684.		3,596,390.
<b>Expenses</b>	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3).....			
	14 Benefits paid to or for members (Part IX, column (A), line 4).....			
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10).....	1,066,674.		1,204,576.
	16a Professional fundraising fees (Part IX, column (A), line 11e).....			
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ <u>433,124.</u>			
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e).....	1,327,122.		1,507,018.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25).....	2,393,796.		2,711,594.
	19 Revenue less expenses. Subtract line 18 from line 12.....	10,888.		884,796.
<b>Not Assets or Fund Balances</b>	20 Total assets (Part X, line 16).....	Beginning of Current Year		End of Year
	21 Total liabilities (Part X, line 26).....	4,614,126.		5,430,168.
	22 Net assets or fund balances. Subtract line 21 from line 20.....	364,421.		354,483.
		4,249,705.		5,075,685.

**Part II Signature Block**

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.

<b>Sign Here</b>	Signature of officer:  <u>THOMPSON FETTER</u> Type or print name and title.	Date: <u>1-27-14</u>	PRESIDENT
<b>Paid Preparer Use Only</b>	Print/Type preparer's name: <u>STEVEN W. NORTHCOTE</u> Firm's name: ▶ <u>LEAF &amp; COLE, LLP</u> Firm's address: ▶ <u>2810 CAMINO DEL RIO SOUTH, SUITE 200</u> <u>SAN DIEGO, CA 92108-3820</u>	Preparer's signature: <u>STEVEN W. NORTHCOTE</u> Date: _____ Check <input checked="" type="checkbox"/> if self-employed PTIN: <u>P00085554</u> Firm's EIN ▶ <u>95-2076568</u> Phone no. <u>619.294.7200</u>	

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒ **X**

- 1 Briefly describe the organization's mission:

SEE SCHEDULE O

- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?
- ☐
- Yes
- ☒
- No

If 'Yes,' describe these new services on Schedule O.

- 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?
- ☐
- Yes
- ☒
- No

If 'Yes,' describe these changes on Schedule O.

- 4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

- 4a (Code: ) (Expenses \$ 668,432. including grants of \$ ) (Revenue \$ 282,141.)

EXHIBITS - DURING THE FISCAL YEAR ENDING JUNE 30, 2015 THE NUMBERS OF VISITORS TO THE SAN DIEGO HISTORY CENTER GREW SUBSTANTIALLY FROM PREVIOUS FISCAL YEARS. 2015 MARKS THE CENTENNIAL OF THE 1915 PANAMA PACIFIC EXPOSITION, AN EVENT RECOGNIZED AS A CATALYST IN CREATING THE SAN DIEGO OF TODAY. THIS INCREASE IN VISITATION IS NOTED IN BOTH VISITOR NUMBERS AND AN INCREASE IN REVENUE, AND CAN BE TIED DIRECTLY TO ROBUST AND ENGAGING PROGRAMMING AND EXHIBITIONS INCLUDING: INGENIOUS! THE WORLD OF DR. SEUSS; SAN DIEGO INVITES THE WORLD (THE EXHIBITION OF RECORD OF THE 1915 EXPOSITION); MASTERWORKS OF THE EXHIBITION ERA (FOR THE FIRST TIME IN A CENTURY DISPLAY OF SOME OF THE FINE ART THAT WAS FEATURED AT THE 1915 EXPOSITION) AND A HISTORY CENTER COMMISSIONED FILM ON BALBOA PARK BALBOA PARK, THE JEWEL OF SAN DIEGO.

- 4b (Code: ) (Expenses \$ 661,147. including grants of \$ ) (Revenue \$ 187,906.)

SEE SCHEDULE O

- 4c (Code: ) (Expenses \$ 347,128. including grants of \$ ) (Revenue \$ )

SEE SCHEDULE O

- 4d Other program services. (Describe in Schedule O.) SEE SCHEDULE O

(Expenses \$ 80,032. including grants of \$ ) (Revenue \$ 6,109.)

- 4e Total program service expenses 1,756,739.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A.	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	X	
3 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.		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II.		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III.		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I.		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If 'Yes,' complete Schedule D, Part II.	X	
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III.	X	
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV.		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If 'Yes,' complete Schedule D, Part V.	X	
11 If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI.	X	
b Did the organization report an amount for investments — other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII.		X
c Did the organization report an amount for investments — program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII.		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX.	X	
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X.	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X.	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, and XII.	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional.		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E.		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If 'Yes,' complete Schedule F, Parts I and IV.		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If 'Yes,' complete Schedule F, Parts II and IV.		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If 'Yes,' complete Schedule F, Parts III and IV.		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions).		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II.	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III.		X
20a Did the organization operate one or more hospital facilities? If 'Yes,' complete Schedule H.		X
b If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II.</i> .....	<b>21</b>	X
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III.</i> .....	<b>22</b>	X
<b>23</b> Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J.</i> .....	<b>23</b>	X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25a.</i> .....	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?.....	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?.....	<b>24c</b>	
<b>d</b> Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?.....	<b>24d</b>	
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I.</i> .....	<b>25a</b>	X
<b>b</b> Is the organization 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? <i>If 'Yes,' complete Schedule L, Part I.</i> .....	<b>25b</b>	X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If 'Yes,' complete Schedule L, Part II.</i> .....	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III.</i> .....	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i> .....	<b>28a</b>	X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i> .....	<b>28b</b>	X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV.</i> .....	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M.</i> .....	<b>29</b>	X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M.</i> .....	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I.</i> .....	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II.</i> .....	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I.</i> .....	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Part II, III, or IV, and Part V, line 1.</i> .....	<b>34</b>	X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?.....	<b>35a</b>	X
<b>b</b> If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2.</i> .....	<b>35b</b>	
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2.</i> .....	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI.</i> .....	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O. ....	<b>38</b>	X

BAA

Form 990 (2014)



**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V. ☐

		Yes	No
<b>1 a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. ....	<b>1 a</b> 31		
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. ....	<b>1 b</b> 0		
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	<b>1 c</b>	X	
<b>2 a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. ....	<b>2 a</b> 50		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? .....	<b>2 b</b>	X	
<b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			
<b>3 a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? .....	<b>3 a</b>	X	
<b>b</b> If 'Yes' has it filed a Form 990-T for this year? If 'No' to line 3b, provide an explanation in Schedule O. ....	<b>3 b</b>	X	
<b>4 a</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)? .....	<b>4 a</b>		X
<b>b</b> If 'Yes,' enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts. (FBAR)			
<b>5 a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? .....	<b>5 a</b>		X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? .....	<b>5 b</b>		X
<b>c</b> If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T? .....	<b>5 c</b>		
<b>6 a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? .....	<b>6 a</b>		X
<b>b</b> If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? .....	<b>6 b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>			
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? .....	<b>7 a</b>	X	
<b>b</b> If 'Yes,' did the organization notify the donor of the value of the goods or services provided? .....	<b>7 b</b>	X	
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? .....	<b>7 c</b>		X
<b>d</b> If 'Yes,' indicate the number of Forms 8282 filed during the year. ....	<b>7 d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? .....	<b>7 e</b>		X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? .....	<b>7 f</b>		X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? .....	<b>7 g</b>		
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? .....	<b>7 h</b>		
<b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? .....	<b>8</b>		
<b>9 Sponsoring organizations maintaining donor advised funds.</b>			
<b>a</b> Did the sponsoring organization make any taxable distributions under section 4966? .....	<b>9 a</b>		
<b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? .....	<b>9 b</b>		
<b>10 Section 501(c)(7) organizations.</b> Enter:			
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12. ....	<b>10 a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. ....	<b>10 b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter:			
<b>a</b> Gross income from members or shareholders. ....	<b>11 a</b>		
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) .....	<b>11 b</b>		
<b>12 a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041? .....	<b>12 a</b>		
<b>b</b> If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year. ....	<b>12 b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>			
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? .....	<b>13 a</b>		
<b>Note.</b> See the instructions for additional information the organization must report on Schedule O.			
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. ....	<b>13 b</b>		
<b>c</b> Enter the amount of reserves on hand. ....	<b>13 c</b>		
<b>14 a</b> Did the organization receive any payments for indoor tanning services during the tax year? .....	<b>14 a</b>		X
<b>b</b> If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O. ....	<b>14 b</b>		

**Part VI Governance, Management, and Disclosure** For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.Check if Schedule O contains a response or note to any line in this Part VI. ☒ **X****Section A. Governing Body and Management**

	Yes	No
<b>1 a</b> Enter the number of voting members of the governing body at the end of the tax year. .... <b>1 a</b> 22		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
<b>b</b> Enter the number of voting members included in line 1a, above, who are independent .... <b>1 b</b> 22		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? .... <b>2</b>		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? .... <b>3</b>		X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .... <b>4</b>		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? .... <b>5</b>		X
<b>6</b> Did the organization have members or stockholders? .... <b>6</b>	X	
<b>7 a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . SEE SCHEDULE O .... <b>7 a</b>	X	
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? .... <b>7 b</b>		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? .... <b>8 a</b>	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? .... <b>8 b</b>	X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O. .... <b>9</b>		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10 a</b> Did the organization have local chapters, branches, or affiliates? .... <b>10 a</b>		X
<b>b</b> If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? .... <b>10 b</b>		
<b>11 a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .... <b>11 a</b>	X	
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990. SEE SCHEDULE O		
<b>12 a</b> Did the organization have a written conflict of interest policy? If 'No,' go to line 13. .... <b>12 a</b>	X	
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .... <b>12 b</b>	X	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this was done . SEE SCHEDULE O .... <b>12 c</b>	X	
<b>13</b> Did the organization have a written whistleblower policy? .... <b>13</b>	X	
<b>14</b> Did the organization have a written document retention and destruction policy? .... <b>14</b>	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official. SEE SCHEDULE O. .... <b>15 a</b>	X	
<b>b</b> Other officers or key employees of the organization. SEE SCHEDULE O. .... <b>15 b</b>	X	
If 'Yes' to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16 a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? .... <b>16 a</b>		X
<b>b</b> If 'Yes,' did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? .... <b>16 b</b>		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ► CA

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☐ Own website ☒ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. SEE SCHEDULE O

**20** State the name, address, and telephone number of the person who possesses the organization's books and records: ►  
 BILL LAWRENCE 1649 EL PRADO, SUITE 3 SAN DIEGO CA 92101 (619) 232-6203

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII. ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1 a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ROBERT F. ADELIZZI PRESIDENT	3 0	X						0.	0.	0.
(2) DEBBY CUSHMAN-PARRISH TRUSTEE	2 0	X						0.	0.	0.
(3) THOMPSON FETTER PRESIDENT	15 0	X		X				0.	0.	0.
(4) ALLAN WASSERMAN TRUSTEE	2 0	X						0.	0.	0.
(5) ANN HILL SECRETARY	5 0	X		X				0.	0.	0.
(6) LUCY C. JACKSON TRUSTEE	2 0	X						0.	0.	0.
(7) JOSEPH CRAVER TRUSTEE	2 0	X						0.	0.	0.
(8) BOB WATKINS VICE PRESIDENT	10 0	X		X				0.	0.	0.
(9) WILLIAM LAWRENCE VICE PRESIDENT	10 0	X		X				0.	0.	0.
(10) FRANK ALESSI TREASURER	10 0	X		X				0.	0.	0.
(11) RAY CARPENTER TRUSTEE	2 0	X						0.	0.	0.
(12) DAN EATON TRUSTEE	2 0	X						0.	0.	0.
(13) ANN NAVARRA TRUSTEE	2 0	X						0.	0.	0.
(14) SUSAN PEINADO TRUSTEE	2 0	X						0.	0.	0.

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) SANDRA PERLATTI TRUSTEE	2 0	X						0.	0.	0.
(16) GAYLE HOM TRUSTEE	2 0	X						0.	0.	0.
(17) ROGER ZUCCHET TRUSTEE	2 0	X						0.	0.	0.
(18) KAY PORTER TRUSTEE	2 0	X						0.	0.	0.
(19) MARGIE WARNER TRUSTEE	2 0	X						0.	0.	0.
(20) JOHN MORRELL TRUSTEE	2 0	X						0.	0.	0.
(21) RICHARD BRIGANTE TRUSTEE	2 0	X						0.	0.	0.
(22) HAL SADLER PRESITUS	3 0	X						0.	0.	0.
(23) CHARLOTTE CAGAN EXECUTIVE DIR.	40 0			X				92,085.	0.	3,000.
(24)										
(25)										
<b>1 b Sub-total</b>								92,085.	0.	3,000.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								92,085.	0.	3,000.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0**

**3** Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If 'Yes,' complete Schedule J for such individual

	Yes	No
<b>3</b>		X
<b>4</b>		X
<b>5</b>		X

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If 'Yes' complete Schedule J for such individual

**5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If 'Yes,' complete Schedule J for such person

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **0**



**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	1 a Federated campaigns .....	1 a				
	b Membership dues .....	1 b				
	c Fundraising events .....	1 c	80,241.			
	d Related organizations .....	1 d				
	e Government grants (contributions) ....	1 e	175,010.			
	f All other contributions, gifts, grants, and similar amounts not included above ...	1 f	2,487,443.			
	g Noncash contributions included in lines 1a-1f: \$		2,000.			
	<b>h Total.</b> Add lines 1a-1f .....		2,742,694.			
<b>Program Service Revenue</b>		Business Code				
	2 a <u>ADMISSIONS</u> .....	900099	288,250.	288,250.		
	b <u>MEMBERSHIP DUES &amp; ASSESSMENTS</u> .....	900099	151,030.	151,030.		
	c <u>FEES AND RENTALS</u> .....	531120	125,061.	125,061.		
	d <u>PROGRAM AND EVENTS</u> .....	900099	36,876.	36,876.		
	e .....					
	f All other program service revenue. ....					
	<b>g Total.</b> Add lines 2a-2f .....		601,217.			
<b>Other Revenue</b>	3 Investment income (including dividends, interest and other similar amounts) .....		3,590.			3,590.
	4 Income from investment of tax-exempt bond proceeds. ....					
	5 Royalties .....		3,308.			3,308.
		(i) Real	(ii) Personal			
	6 a Gross rents .....	89,700.				
	b Less: rental expenses .....	20,603.				
	c Rental income or (loss) ...	69,097.				
	d Net rental income or (loss) .....		69,097.		69,097.	
		(i) Securities	(ii) Other			
	7 a Gross amount from sales of assets other than inventory .....					
	b Less: cost or other basis and sales expenses .....		30,236.			
	c Gain or (loss) .....		-30,236.			
	d Net gain or (loss) .....		-30,236.	-30,236.		
	8 a Gross income from fundraising events (not including..\$ 80,241. of contributions reported on line 1c). See Part IV, line 18. ....	a	58,848.			
	b Less: direct expenses .....	b	62,639.			
	c Net income or (loss) from fundraising events .....		-3,791.			-3,791.
	9 a Gross income from gaming activities. See Part IV, line 19. ....	a				
b Less: direct expenses .....	b					
c Net income or (loss) from gaming activities. ....						
10 a Gross sales of inventory, less returns and allowances .....	a	312,311.				
b Less: cost of goods sold. ....	b	114,744.				
c Net income or (loss) from sales of inventory .....		197,567.			197,567.	
	Miscellaneous Revenue	Business Code				
11 a <u>OTHER REVENUE</u> .....	900099	12,944.	12,944.			
b .....						
c .....						
d All other revenue .....						
e <b>Total.</b> Add lines 11a-11d .....		12,944.				
<b>12 Total revenue.</b> See instructions .....		3,596,390.	583,925.	69,097.	200,674.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX. ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	92,085.	36,834.	23,021.	32,230.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	898,159.	550,106.	235,573.	112,480.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.	129,281.	70,146.	39,346.	19,789.
10 Payroll taxes.	85,051.	44,632.	29,654.	10,765.
11 Fees for services (non-employees):				
a Management.				
b Legal.	4,185.		1,185.	3,000.
c Accounting.				
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	112,660.	38,215.	50,799.	23,646.
12 Advertising and promotion.	90,603.	65,421.	22,333.	2,849.
13 Office expenses.	21,341.	7,908.	11,566.	1,867.
14 Information technology.				
15 Royalties.				
16 Occupancy.				
17 Travel.	10,518.	4,647.	3,855.	2,016.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	91,822.	73,269.	14,511.	4,042.
23 Insurance.	46,436.	17,433.	28,792.	211.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>OUTSIDE SERVICES</u>	430,739.	273,850.	6,082.	150,807.
b <u>PRODUCTION &amp; EXHIBITION COSTS</u>	228,583.	228,583.		
c <u>UTILITIES</u>	103,062.	86,308.	11,296.	5,458.
d <u>PRINTING AND PUBLICATIONS</u>	98,688.	57,774.	2,100.	38,814.
e All other expenses.	268,381.	201,613.	41,618.	25,150.
25 Total functional expenses. Add lines 1 through 24e.	2,711,594.	1,756,739.	521,731.	433,124.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash — non-interest-bearing .....	258,792.	1	639,024.
	2 Savings and temporary cash investments .....	127,098.	2	934,704.
	3 Pledges and grants receivable, net .....	974,339.	3	716,601.
	4 Accounts receivable, net .....	29,800.	4	58,439.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L .....		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L .....		6	
	7 Notes and loans receivable, net .....		7	
	8 Inventories for sale or use .....	30,248.	8	36,714.
	9 Prepaid expenses and deferred charges .....	33,099.	9	30,607.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	10a 5,596,002.		
	b Less: accumulated depreciation .....	10b 3,182,078.		
		2,520,376.	10c	2,413,924.
	11 Investments — publicly traded securities .....	471,953.	11	210,077.
	12 Investments — other securities. See Part IV, line 11 .....		12	
	13 Investments — program-related. See Part IV, line 11 .....		13	
	14 Intangible assets .....		14	
15 Other assets. See Part IV, line 11 .....	168,421.	15	390,078.	
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) .....	4,614,126.	16	5,430,168.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses .....	227,650.	17	248,068.
	18 Grants payable .....		18	
	19 Deferred revenue .....	36,290.	19	24,974.
	20 Tax-exempt bond liabilities .....		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D .....		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		22	
	23 Secured mortgages and notes payable to unrelated third parties .....		23	
	24 Unsecured notes and loans payable to unrelated third parties .....	90,988.	24	67,548.
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....	9,493.	25	13,893.
	26 <b>Total liabilities.</b> Add lines 17 through 25 .....	364,421.	26	354,483.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	27 Unrestricted net assets .....	2,579,020.	27	3,435,958.
	28 Temporarily restricted net assets .....	1,169,657.	28	939,101.
	29 Permanently restricted net assets .....	501,028.	29	700,626.
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	30 Capital stock or trust principal, or current funds .....		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund .....		31	
	32 Retained earnings, endowment, accumulated income, or other funds .....		32	
	33 <b>Total net assets or fund balances.</b> .....	4,249,705.	33	5,075,685.
	34 <b>Total liabilities and net assets/fund balances.</b> .....	4,614,126.	34	5,430,168.

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Form 990 (2014)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI. ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	3,596,390.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,711,594.
3	Revenue less expenses. Subtract line 2 from line 1	3	884,796.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	4,249,705.
5	Net unrealized gains (losses) on investments	5	-54,342.
6	Donated services and use of facilities	6	
7	Investment expenses	7	-4,474.
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	5,075,685.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII. ☐

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____		
If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:		
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
b Were the organization's financial statements audited by an independent accountant?	X	
If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:		
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
c If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
b If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.		

BAA

Form 990 (2014)



**SCHEDULE A**  
(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ.

► Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Name of the organization  
**SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER**

Employer identification number  
**95-1728991**

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
  - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e ☐ Check this box if the organization received a written determination from the IRS that is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations .....
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2014

**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 or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.) . . . . .	1,518,712.	1,877,117.	2,395,083.	2,010,955.	1,676,279.	9,478,146.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . . . .						0.
3 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						0.
4 <b>Total.</b> Add lines 1 through 3. . . . .	1,518,712.	1,877,117.	2,395,083.	2,010,955.	1,676,279.	9,478,146.
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). . . . .						2,002,596.
6 <b>Public support.</b> Subtract line 5 from line 4. . . . .						7,475,550.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
7 Amounts from line 4. . . . .	1,518,712.	1,877,117.	2,395,083.	2,010,955.	1,676,279.	9,478,146.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . . . .	10,646.	7,204.	10,177.	9,530.	5,769.	43,326.
9 Net income from unrelated business activities, whether or not the business is regularly carried on. . . . .				30,800.	64,741.	95,541.
10 Other income. Do not include gain or loss from the sale of capital assets. (Explain in Part VI.) SEE PART VI. . . . .	4,422.	4,021.	47,680.	39,944.	12,944.	109,011.
11 <b>Total support.</b> Add lines 7 through 10. . . . .						9,726,024.
12 Gross receipts from related activities, etc (see instructions). . . . .					12	2,108,894.
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 <b>stop here</b> . . . . . ▶ <input type="checkbox"/>						

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

14 Public support percentage for 2014 (line 6, column (f) divided by line 11, column (f)). . . . .	14	76.86 %
15 Public support percentage from 2013 Schedule A, Part II, line 14. . . . .	15	73.44 %
16a <b>33-1/3% support test – 2014.</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 checked="" type="checkbox"/>		
b <b>33-1/3% support test – 2013.</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 – 2014.</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 VI 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 – 2013.</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 VI 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"/>		

**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 or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants'.) . . . . .						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose. . . . .						
3 Gross receipts from activities that are not an unrelated trade or business under section 513. . . . .						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . . . .						
5 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .						
6 <b>Total.</b> Add lines 1 through 5. . . . .						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons. . . . .						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year. . . . .						
c Add lines 7a and 7b. . . . .						
8 <b>Public support.</b> (Subtract line 7c from line 6.) . . . . .						

**Section B. Total Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
9 Amounts from line 6. . . . .						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . . . .						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. . . . .						
c Add lines 10a and 10b. . . . .						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on. . . . .						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
13 <b>Total support.</b> (Add lines 9, 10c, 11 and 12.) . . . . .						
14 <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 <b>stop here.</b> . . . . . <input type="checkbox"/>						

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

15 Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f)). . . . .	15	%
16 Public support percentage from 2013 Schedule A, Part III, line 15. . . . .	16	%

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

17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f)) . . . . .	17	%
18 Investment income percentage from 2013 Schedule A, Part III, line 17 . . . . .	18	%

- 19a **33-1/3% support tests — 2014.** 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 — 2013.** If the organization did not check a box on line 14 or line 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 Supporting Organizations**

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? If 'No,' describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain. ....		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If 'Yes,' explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2) .....		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If 'Yes,' answer (b) and (c) below. ....		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If 'Yes,' describe in <b>Part VI</b> when and how the organization made the determination. ....		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If 'Yes,' explain in <b>Part VI</b> what controls the organization put in place to ensure such use .....		
<b>4a</b> Was any supported organization not organized in the United States ('foreign supported organization')? If 'Yes' and if you checked 11a or 11b in Part I, answer (b) and (c) below. ....		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If 'Yes,' describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations .....		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If 'Yes,' explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes .....		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? If 'Yes,' answer (b) and (c) below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document) .....		
<b>b</b> <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document? .....		
<b>c</b> <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control? .....		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If 'Yes,' provide detail in <b>Part VI</b> .....		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If 'Yes,' complete Part I of Schedule L (Form 990) .....		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If 'Yes,' complete Part I of Schedule L (Form 990) .....		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If 'Yes,' provide detail in <b>Part VI</b> .....		
<b>b</b> Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If 'Yes,' provide detail in <b>Part VI</b> .....		
<b>c</b> Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If 'Yes,' provide detail in <b>Part VI</b> .....		
<b>10a</b> Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If 'Yes,' answer (b) below .....		
<b>b</b> Did the organization, have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.) .....		



**Part IV Supporting Organizations** (continued)

11 Has the organization accepted a gift or contribution from any of the following persons?

a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization? .....

	Yes	No
11a		

b A family member of a person described in (a) above? .....

11b		
-----	--	--

c A 35% controlled entity of a person described in (a) or (b) above? If 'Yes' to a, b, or c, provide detail in Part VI .....

11c		
-----	--	--

**Section B. Type I Supporting Organizations**

1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If 'No,' describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. ....

	Yes	No
1		

2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If 'Yes,' explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization. ....

2		
---	--	--

**Section C. Type II Supporting Organizations**

1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If 'No,' describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s). ....

	Yes	No
1		

**Section D. All Type III Supporting Organizations**

1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? .....

	Yes	No
1		

2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If 'No,' explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s). ....

2		
---	--	--

3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If 'Yes,' describe in Part VI the role the organization's supported organizations played in this regard. ....

3		
---	--	--

**Section E. Type III Functionally-Integrated Supporting Organizations**

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):

- a ☐ The organization satisfied the Activities Test. Complete line 2 below.
- b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.
- c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).

2 Activities Test. Answer (a) and (b) below.

a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If 'Yes,' then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities. ....

	Yes	No
2a		

b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If 'Yes,' explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement. ....

2b		
----	--	--

3 Parent of Supported Organizations. Answer (a) and (b) below.

a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI. ....

3a		
----	--	--

b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If 'Yes,' describe in Part VI the role played by the organization in this regard. ....

3b		
----	--	--

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on November 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain .....	1	
2	Recoveries of prior-year distributions .....	2	
3	Other gross income (see instructions) .....	3	
4	Add lines 1 through 3 .....	4	
5	Depreciation and depletion .....	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) .....	6	
7	Other expenses (see instructions) .....	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4) .....	8	

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities .....	1a	
b	Average monthly cash balances .....	1b	
c	Fair market value of other non-exempt-use assets .....	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c) .....	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets .....	2	
3	Subtract line 2 from line 1d. ....	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions) .....	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3) .....	5	
6	Multiply line 5 by .035 .....	6	
7	Recoveries of prior-year distributions .....	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6) .....	8	

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A) .....	1	
2	Enter 85% of line 1 .....	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A) .....	3	
4	Enter greater of line 2 or line 3 .....	4	
5	Income tax imposed in prior year .....	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) .....	6	

- 7 ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).

BAA

Schedule A (Form 990 or 990-EZ) 2014

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

Section D – Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes.....	
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity.....	
3	Administrative expenses paid to accomplish exempt purposes of supported organizations.....	
4	Amounts paid to acquire exempt-use assets.....	
5	Qualified set-aside amounts (prior IRS approval required).....	
6	Other distributions (describe in Part VI). See instructions.....	
7	<b>Total annual distributions.</b> Add lines 1 through 6.....	
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.....	
9	Distributable amount for 2014 from Section C, line 6.....	
10	Line 8 amount divided by Line 9 amount.....	

Section E – Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2014	(iii) Distributable Amount for 2014
1 Distributable amount for 2014 from Section C, line 6.....			
2 Underdistributions, if any, for years prior to 2014 (reasonable cause required – see instructions).....			
3 Excess distributions carryover, if any, to 2014:			
a			
b			
c			
d			
e From 2013.....			
f <b>Total</b> of lines 3a through e.....			
g Applied to underdistributions of prior years.....			
h Applied to 2014 distributable amount.....			
i Carryover from 2009 not applied (see instructions).....			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.....			
4 Distributions for 2014 from Section D, line 7: \$			
a Applied to underdistributions of prior years.....			
b Applied to 2014 distributable amount.....			
c Remainder. Subtract lines 4a and 4b from 4.....			
5 Remaining underdistributions for years prior to 2014, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).....			
6 Remaining underdistributions for 2014. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).....			
7 <b>Excess distributions carryover to 2015.</b> Add lines 3j and 4c.....			
8 Breakdown of line 7:			
a			
b			
c			
d Excess from 2013.....			
e Excess from 2014.....			

BAA

Schedule A (Form 990 or 990-EZ) 2014

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

**PART II, LINE 10 - OTHER INCOME**

NATURE AND SOURCE	2014	2013	2012	2011	2010
OTHER REVENUE	\$ 12,944.	\$ 39,944.	\$ 47,680.	\$ 4,021.	\$ 4,422.
TOTAL	<u>\$ 12,944.</u>	<u>\$ 39,944.</u>	<u>\$ 47,680.</u>	<u>\$ 4,021.</u>	<u>\$ 4,422.</u>



**Schedule B**  
**(Form 990, 990-EZ,**  
**or 990-PF)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF**  
▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Name of the organization **SAN DIEGO HISTORICAL SOCIETY**  
**DBA SAN DIEGO HISTORY CENTER**

Employer identification number  
**95-1728991**

**Organization type** (check one):

**Filers of:**

Form 990 or 990-EZ

**Section:**

☒ 501(c)( 3 ) (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 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 33-1/3% 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990EZ,**

**Schedule B (Form 990, 990-EZ, or 990-PF) (2014)**

Name of organization

Employer identification number

SAN DIEGO HISTORICAL SOCIETY

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	PRICE PHILANTHROPIES FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 55,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	THE ROBERT D.L. GARDINER FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	JANE & THOMPSON FETTER FUND -SDF 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	HUNTE FUND 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	PHILIP KLAUBER - SD FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 200,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	MILBURN FAMILY TRUST 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 400,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

SAN DIEGO HISTORICAL SOCIETY

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	PHYLLIS PAUL TRUST 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 617,445.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

SAN DIEGO HISTORICAL SOCIETY

95-1728991

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2014)



**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

► Complete if the organization answered 'Yes,' to Form 990,  
Part IV, lines 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
► Attach to Form 990.

► Information about Schedule D (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

**Open to Public  
Inspection**

Name of the organization

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

Employer identification number

95-1728991

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

**Part II Conservation Easements.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input checked="" type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2 a 9
b Total acreage restricted by conservation easements .....	2 b
c Number of conservation easements on a certified historic structure included in (a) .....	2 c 9
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register. ....	2 d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ► \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ► 1

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☒ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ► \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ► \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements. **SEE PART XIII**

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items. **SEE PART XIII**

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included in Form 990, Part VIII, line 1 ..... ► \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X ..... ► \$ \_\_\_\_\_

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included in Form 990, Part VIII, line 1 ..... ► \$ \_\_\_\_\_

b Assets included in Form 990, Part X ..... ► \$ \_\_\_\_\_



**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

a ☒ Public exhibition

d ☐ Loan or exchange programs

b ☒ Scholarly research

e ☐ Other

c ☒ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII. SEE PART XIII

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☒ No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1 a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If 'Yes,' explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1 c
d Additions during the year	1 d
e Distributions during the year	1 e
f Ending balance	1 f

2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If 'Yes,' explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII.

**Part V Endowment Funds.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance	501,028.	489,768.	479,269.	485,803.	442,832.
b Contributions	200,000.		500.		23,003.
c Net investment earnings, gains, and losses	5,836.	53,848.	37,769.	443.	28,363.
d Grants or scholarships					
e Other expenditures for facilities and programs	6,238.	42,588.	27,770.	6,977.	8,395.
f Administrative expenses					
g End of year balance	700,626.	501,028.	489,768.	479,269.	485,803.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ☐ %

b Permanent endowment ☒ 100.00 %

c Temporarily restricted endowment ☐ %

The percentages in lines 2a, 2b, and 2c should equal 100%.

3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) unrelated organizations

	Yes	No
3a(i)	X	
3a(ii)		X
3b		

(ii) related organizations

b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIII the intended uses of the organization's endowment funds. SEE PART XIII

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land		480,847.		480,847.
b Buildings				
c Leasehold improvements		3,325,765.	1,469,531.	1,856,234.
d Equipment		713,510.	678,225.	35,285.
e Other		1,075,880.	1,034,322.	41,558.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				2,413,924.

BAA

Schedule D (Form 990) 2014

**Part VII Investments – Other Securities.**

N/A

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives.....		
(2) Closely-held equity interests.....		
(3) Other -----		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
Total. (Column (b) must equal Form 990, Part X, column (B) line 12.)... ▶		

**Part VIII Investments – Program Related.**

N/A

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) -----		
(2) -----		
(3) -----		
(4) -----		
(5) -----		
(6) -----		
(7) -----		
(8) -----		
(9) -----		
(10) -----		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.)... ▶		

**Part IX Other Assets.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) CONSTRUCTION IN PROGRESS	22,059.
(2) SAN DIEGO FOUNDATION-FUND 1028	368,019.
(3) -----	
(4) -----	
(5) -----	
(6) -----	
(7) -----	
(8) -----	
(9) -----	
(10) -----	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15.)... ▶	390,078.

**Part X Other Liabilities.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) SECURITY DEPOSITS	13,893.
(3) -----	
(4) -----	
(5) -----	
(6) -----	
(7) -----	
(8) -----	
(9) -----	
(10) -----	
(11) -----	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.)... ▶	13,893.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII. SEE PART XIII. ☒

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements.....	1	3,740,034.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
	a Net unrealized gains (losses) on investments.....	2a	-54,342.
	b Donated services and use of facilities.....	2b	
	c Recoveries of prior year grants.....	2c	
	d Other (Describe in Part XIII.) SEE PART XIII.....	2d	197,986.
	e Add lines 2a through 2d.....	2e	143,644.
3	Subtract line 2e from line 1.....	3	3,596,390.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
	a Investment expenses not included on Form 990, Part VIII, line 7b.....	4a	
	b Other (Describe in Part XIII.).....	4b	
	c Add lines 4a and 4b.....	4c	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.).....	5	3,596,390.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements.....	1	2,909,580.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
	a Donated services and use of facilities.....	2a	
	b Prior year adjustments.....	2b	
	c Other losses.....	2c	
	d Other (Describe in Part XIII.) SEE PART XIII.....	2d	197,986.
	e Add lines 2a through 2d.....	2e	197,986.
3	Subtract line 2e from line 1.....	3	2,711,594.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
	a Investment expenses not included on Form 990, Part VIII, line 7b.....	4a	
	b Other (Describe in Part XIII.).....	4b	
	c Add lines 4a and 4b.....	4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.).....	5	2,711,594.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART II, LINE 9 - ORGANIZATION REPORTING OF CONSERVATION EASEMENTS**

THE ORGANIZATION HAS NOT RECORDED ANY REVENUE OR EXPENSE RELATED TO THE CONSERVATION EASEMENTS.

**PART III, LINE 1A - F/S FOOTNOTE FOR ART, TREASURES, ETC.**

IN CONFORMITY WITH THE PRACTICE FOLLOWED BY MANY MUSEUMS, HISTORICAL ARTIFACTS PURCHASED BY OR DONATED TO THE HISTORY CENTER ARE NOT CAPITALIZED IN THE STATEMENT OF FINANCIAL POSITION. THE HISTORY CENTER'S COLLECTION COMPRISES ARTIFACTS THAT ARE HELD FOR PRESERVATION, EXHIBITION, PUBLIC ACCESSIBILITY, EDUCATIONAL USE AND PROGRAM

**Part XIII** Supplemental Information (continued)**PART III, LINE 1A - F/S FOOTNOTE FOR ART, TREASURES, ETC. (CONTINUED)**

ACTIVITIES. EACH OF THE ITEMS IS CATALOGED, PRESERVED AND CARED FOR, AND ACTIVITIES VERIFYING THEIR EXISTENCE AND ASSESSING THEIR CONDITION ARE PERFORMED CONTINUOUSLY. PURCHASED COLLECTION ITEMS ARE RECORDED AS DECREASES IN UNRESTRICTED NET ASSETS IN THE YEAR IN WHICH THE ITEMS ARE ACQUIRED, OR IN TEMPORARILY OR PERMANENTLY RESTRICTED NET ASSETS IF THE NET ASSETS USED TO PURCHASE THE ITEMS ARE RESTRICTED BY THE DONOR. CONTRIBUTED COLLECTION ITEMS ARE EXCLUDED FROM THE FINANCIAL STATEMENTS.

PROCEEDS FROM THE DE-ACCESSIONING OF ARTIFACTS OR INSURANCE RECOVERIES ARE REFLECTED AS INCREASES IN THE APPROPRIATE NET ASSET CLASSES.

**PART III, LINE 4 - DESCRIPTION OF ORGANIZATION COLLECTIONS & HOW FURTHERS EXEMPT PURPOSE**

WITH THREE MAIN COLLECTING AREAS - THE OBJECT COLLECTION, THE DOCUMENT ARCHIVES, AND THE PHOTOGRAPHY COLLECTION - THE HISTORY CENTER TELLS THE STORY OF SAN DIEGO FROM ITS EARLY KUMEYAAY BEGINNINGS TO THE MULTICULTURAL METROPOLITAN REGION OF TODAY. THE OBJECTS COLLECTIONS CONTAINS APPROXIMATELY 16,000 ITEMS, INCLUDING OBJECTS OF DAILY LIFE, DECORATIVE ARTS, FINE ARTS, AND ONE OF THE BEST HISTORIC CLOTHING COLLECTIONS IN THE COUNTRY. THE DOCUMENT ARCHIVES CONSIST OF PUBLIC RECORDS, MAPS, UNPUBLISHED MANUSCRIPTS, NEWSPAPERS, ARCHITECTURAL RECORDS, EPHEMERA, AND ONE OF THE LARGEST ORAL HISTORY COLLECTIONS IN CALIFORNIA. THE HISTORY CENTER'S RENOWNED COLLECTION OF PHOTOGRAPH INCLUDES APPROXIMATELY 2.5 MILLION IMAGES AND IS ONE OF THE MOST IMPORTANT REGIONAL PHOTOGRAPHY COLLECTIONS IN THE UNITED STATES.

THE HISTORY CENTER ADDS TO ITS COLLECTIONS ON AN ONGOING BASIS, PRIMARILY THROUGH DONATIONS, AND PRESERVES THESE ITEMS FOR THE BENEFIT OF FUTURE GENERATIONS. OBJECTS COLLECTIONS ARE USED IN EXHIBITIONS; REPRODUCTIONS OF IMAGES CAN BE SEEN IN BOOKS, MAGAZINES, REPORTS, FILM, TELEVISION, ADVERTISING, AND ON THE WALLS OF NUMEROUS LOCAL BUSINESSES, ORGANIZATIONS AND HOMES.

**Part XIII Supplemental Information** (continued)**PART V, LINE 4 - INTENDED USES OF ENDOWMENT FUND**

ENDOWMENT INCOME INTENDED FOR THE GENERAL OPERATION OF THE ORGANIZATION.

**PART X - FIN 48 FOOTNOTE**

THE HISTORY CENTER IS A PUBLIC CHARITY AND IS EXEMPT FROM INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND SECTION 23701(D) OF THE CALIFORNIA REVENUE AND TAXATION CODE EXCEPT ON NET INCOME DERIVED FROM UNRELATED BUSINESS ACTIVITIES. THE HISTORY CENTER BELIEVES THAT IT HAS APPROPRIATE SUPPORT FOR ANY TAX POSITIONS TAKEN, AND AS SUCH, DOES NOT HAVE ANY UNCERTAIN TAX POSITIONS THAT ARE MATERIAL TO THE FINANCIAL STATEMENTS. THE HISTORY CENTER IS NOT A PRIVATE FOUNDATION.

THE HISTORY CENTER'S RETURN OF ORGANIZATION EXEMPT FROM INCOME TAX AND EXEMPT ORGANIZATION BUSINESS INCOME TAX RETURNS FOR TAX FOR THE YEARS ENDED JUNE 30, 2015, 2014, 2013 AND 2012 ARE SUBJECT TO EXAMINATION BY THE INTERNAL REVENUE SERVICE AND STATE TAXING AUTHORITIES, GENERALLY THREE TO FOUR YEARS AFTER THE RETURNS WERE FILED.

**SCHEDULE D, PART XI, LINE 2D****OTHER REVENUE INCLUDED IN F/S BUT NOT INCLUDED ON FORM 990**

COST OF MUSEUM STORE SALES.....	\$	114,744.
FACILITY RENTAL COSTS.....		20,603.
SPECIAL EVENT EXPENSES.....		62,639.
TOTAL	\$	<u>197,986.</u>

**SCHEDULE D, PART XII, LINE 2D****OTHER EXPENSES AND LOSSES PER AUDITED F/S**

COST OF MUSEUM STORE SALES.....	\$	114,744.
FACILITY RENTAL COSTS.....		20,603.
SPECIAL EVENT EXPENSES.....		62,639.
TOTAL	\$	<u>197,986.</u>





**Part II Fundraising Events.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1 <u>HISTORY MAKERS</u> (event type)	(b) Event #2 _____ (event type)	(c) Other events <u>NONE</u> (total number)	(d) Total events (add column (a) through column (c))
REVENUE	1	Gross receipts .....	134,075.		134,075.
	2	Less: Contributions .....	80,150.		80,150.
	3	Gross income (line 1 minus line 2) .....	53,925.		53,925.
DIRECT EXPENSES	4	Cash prizes .....			
	5	Noncash prizes .....			
	6	Rent/facility costs .....			
	7	Food and beverages .....	55,200.		55,200.
	8	Entertainment .....			
	9	Other direct expenses .....			
	10	Direct expense summary. Add lines 4 through 9 in column (d) .....			55,200.
	11	Net income summary. Subtract line 10 from line 3, column (d) .....			-1,275.

**Part III Gaming.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add column (a) through column (c))
REVENUE	1	Gross revenue .....			
	2	Cash prizes .....			
DIRECT EXPENSES	3	Noncash prizes .....			
	4	Rent/facility costs .....			
	5	Other direct expenses .....			
	6	Volunteer labor .....	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No
	7	Direct expense summary. Add lines 2 through 5 in column (d) .....			
	8	Net gaming income summary. Subtract line 7 from line 1, column (d) .....			

9 Enter the state(s) in which the organization conducts gaming activities:

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If 'No,' explain:

10 a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If 'Yes,' explain:

**11** Does the organization operate gaming activities with nonmembers? ☐ Yes ☐ No

**12** Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

**13** Indicate the percentage of gaming activity conducted in:

<b>a</b> The organization's facility	<b>13a</b>	%
<b>b</b> An outside facility	<b>13b</b>	%

**14** Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

**15a** Does the organization have a contact with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

**b** If 'Yes,' enter the amount of gaming revenue received by the organization ▶ \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ▶ \$ \_\_\_\_\_.

**c** If 'Yes,' enter name and address of the third party:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

**16** Gaming manager information:

Name ▶ \_\_\_\_\_

Gaming manager compensation ▶ \$ \_\_\_\_\_

Description of services provided ▶ \_\_\_\_\_

☐ Director/officer

☐ Employee

☐ Independent contractor

**17** Mandatory distributions

**a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

**b** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ \_\_\_\_\_

**Part IV** **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information (see instructions).

**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 990-EZ or to provide any additional information.

► Attach to Form 990 or 990-EZ.

► Information about Schedule O (Form 990 or 990-EZ) and its instructions is  
at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

**Open to Public  
Inspection**

Name of the organization

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

Employer identification number

95-1728991

**FORM 990, PART III, LINE 1 - ORGANIZATION MISSION**

THE SAN DIEGO HISTORY CENTER ("THE HISTORY CENTER"), FOUNDED IN 1928 AS THE SAN DIEGO HISTORICAL SOCIETY, IS A CALIFORNIA NOT-FOR-PROFIT CORPORATION WITH TWO LOCATIONS: THE HISTORY CENTER IN BALBOA PARK AND THE SERRA MUSEUM IN PRESIDIO PARK. AS A LONGSTANDING EDUCATIONAL AND CULTURAL INSTITUTION, THE HISTORY CENTER PRESERVES, CONSERVES, INTERPRETS AND EXHIBITS ITS VAST HISTORICAL COLLECTIONS, SHARING THEM WITH ITS MEMBERS, VISITORS AND THE COMMUNITY. THE HISTORY CENTER TELLS THE DIVERSE STORIES OF THE SAN DIEGO REGION, CONNECTING THE PAST WITH THE PRESENT AND THE FUTURE AND FOSTERING KNOWLEDGE AND APPRECIATION OF SAN DIEGO'S RICH REGIONAL HISTORY. THE HISTORY CENTER'S VISION IS TO BE A CORE COMMUNITY INSTITUTION, SIGNIFICANT CIVIC ASSET, INFORMAL LEARNING CENTER FOR ALL AGES, AND TO HELP SHAPE THE FUTURE OF OUR COMMUNITY.

**FORM 990, PART III, LINE 4B - PROGRAM SERVICE ACCOMPLISHMENTS**

EDUCATION/PUBLIC AWARENESS - EDUCATION PROGRAMS ARE OFFERED FOR K - 12, FAMILY, AND ADULT AUDIENCES. THE HISTORY CENTER SERVES APPROXIMATELY 11,000 K - 12 STUDENTS ANNUALLY AT BOTH THE JUNIPERO SERRA MUSEUM AND HISTORY CENTER IN BALBOA PARK, PROVIDING ESSENTIAL HISTORY EDUCATION TIED CLOSELY TO THE SCHOOL CURRICULUM AS WELL AS STRENGTHENING STUDENTS' READING, MATH, AND OTHER SKILLS. POPULAR HANDS-ON PROGRAMS FOR FAMILIES AND ADULTS INCLUDE TOURS, LECTURES AND PROGRAMS SUCH AS HISTORY FOR HALF-PINTS AND SAN DIEGO HISTORY 101.

THE HISTORY CENTER PUBLISHES THE JOURNAL OF SAN DIEGO HISTORY, WHICH HAS BEEN PUBLISHED CONTINUOUSLY SINCE 1955; THE TIMES, MEMBERS' QUARTERLY NEWSLETTER AND HISTORY NOW! MONTHLY E-BULLETIN. IN ADDITION THE SAN DIEGO HISTORY WEBSITE IN FY 15 HAD MORE THAN 1.3 MILLION PAGE VIEWS.

Name of the organization **SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER**

Employer identification number  
**95-1728991**

**FORM 990, PART III, LINE 4C - PROGRAM SERVICE ACCOMPLISHMENTS**

MUSEUM COLLECTIONS - WITH THREE MAIN COLLECTING AREAS - THE OBJECT COLLECTION, THE DOCUMENT ARCHIVES, AND THE PHOTOGRAPHY COLLECTION - THE HISTORY CENTER TELLS THE STORY OF SAN DIEGO FROM ITS EARLY KUMEYAAY BEGINNINGS TO THE MULTICULTURAL METROPOLITAN REGION OF TODAY. THE OBJECTS COLLECTIONS CONTAINS APPROXIMATELY 16,000 ITEMS, INCLUDING OBJECTS OF DAILY LIFE, DECORATIVE ARTS, FINE ARTS, AND ONE OF THE BEST HISTORIC CLOTHING COLLECTIONS IN THE COUNTRY. THE DOCUMENT ARCHIVES CONSIST OF PUBLIC RECORDS, MAPS, UNPUBLISHED MANUSCRIPTS, NEWSPAPERS, ARCHITECTURAL RECORDS, EPHEMERA, AND ONE OF THE LARGEST ORAL HISTORY COLLECTIONS IN CALIFORNIA. THE HISTORY CENTER'S RENOWNED COLLECTION OF PHOTOGRAPH INCLUDES APPROXIMATELY 2.5 MILLION IMAGES AND IS ONE OF THE MOST IMPORTANT REGIONAL PHOTOGRAPHY COLLECTIONS IN THE UNITED STATES.

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**FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION**

LIBRARY - THE DOCUMENT ARCHIVES AND PHOTOGRAPHY COLLECTIONS ARE MADE AVAILABLE IN THE RESEARCH LIBRARY FOR THE BENEFIT OF THE PUBLIC, SCHOLARS, STUDENTS, PROFESSIONAL RESEARCHERS AND THE LOCAL BUSINESS COMMUNITY. MANY IMAGES FROM THE HISTORIC PHOTO COLLECTION ARE AVAILABLE ONLINE AND ARE WIDELY VIEWED AND PURCHASED. THE OBJECTS COLLECTION IS AVAILABLE TO QUALIFIED RESEARCHERS/MUSEUM PROFESSIONALS BY REQUEST.

Name of the organization **SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER**

Employer identification number  
**95-1728991**

**FORM 990, PART VI, LINE 7A - HOW MEMBERS OR SHAREHOLDERS ELECT GOVERNING BODY**

THE ORGANIZATION'S MEMBERSHIP ELECT THE BOARD OF TRUSTEES.

**FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS**

THE DRAFT OF THE 990 IS REVIEWED BY MANAGEMENT, CHANGES ARE SENT TO THE AUDITOR. THE NEW DRAFT IS THEN SENT TO THE AUDIT/FINANCE COMMITTEE FOR REVIEW. ANY SUGGESTED CHANGES ARE DISCUSSED WITH MANAGEMENT, THEN SENT TO AUDITOR FOR UPDATE.

THE AUDIT COMMITTEE THEN SENDS NEW DRAFT TO THE ENTIRE BOARD OF DIRECTORS, WITH A RECOMMENDATION TO ACCEPT. AT THE FOLLOWING BOARD MEETING, THE 990 IS APPROVED BY THE ENTIRE BOARD OF DIRECTORS.

**FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS**

THE ORGANIZATION IMPLEMENTED A CONFLICT OF INTEREST POLICY WHICH INCLUDES A REQUIREMENT THAT OFFICERS, DIRECTORS OR TRUSTEES, AND KEY EMPLOYEES DISCLOSE, ON AN ANNUAL BASIS INTERESTS THAT COULD GIVE RISE TO ANY CONFLICTS. CONFLICTS ARE DISCUSSED DURING AN ANNUAL REVIEW.

**FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS - CEO & TOP MANAGEMENT**

THE EXECUTIVE/FINANCE COMMITTEE WILL REVIEW THE EXECUTIVE DIRECTORS SALARY AND BENEFITS ON AN ANNUAL BASIS.

SALARIES FOR SIMILAR POSITIONS IN SIMILAR ORGANIZATIONS ARE COLLECTED (AT LEAST 3). THE EXECUTIVE COMMITTEE WILL AT THIS TIME ADJUST THE COMPENSATION FOR THE EXECUTIVE DIRECTOR AS APPROPRIATE.

**FORM 990, PART VI, LINE 15B - COMPENSATION REVIEW & APPROVAL PROCESS - OFFICERS & KEY EMPLOYEES**

THE EXECUTIVE/FINANCE COMMITTEE WILL REVIEW THE EXECUTIVE DIRECTORS SALARY AND BENEFITS ON AN ANNUAL BASIS.

SALARIES FOR SIMILAR POSITIONS IN SIMILAR ORGANIZATIONS ARE COLLECTED (AT LEAST 3). THE EXECUTIVE COMMITTEE WILL AT THIS TIME ADJUST THE COMPENSATION FOR THE EXECUTIVE DIRECTOR AS APPROPRIATE.

Name of the organization SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

Employer identification number  
95-1728991

**FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE**

THE ORGANIZATION MAKES ITS AUDITED FINANCIAL STATEMENTS, GOVERNING DOCUMENTS AND  
POLICIES AVAILABLE UPON REQUEST.



Form **4562**Department of the Treasury  
Internal Revenue Service (99)**Depreciation and Amortization**  
(Including Information on Listed Property)

► Attach to your tax return.

► Information about Form 4562 and its separate instructions is at [www.irs.gov/form4562](http://www.irs.gov/form4562).

OMB No. 1545-0172

**2014**Attachment  
Sequence No. **179**Name(s) shown on return **SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER**Identifying number  
**95-1728991**

Business or activity to which this form relates

**DEPRECIATION SCHEDULES ONLY****Part I Election To Expense Certain Property Under Section 179**

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions).	1
2	Total cost of section 179 property placed in service (see instructions).	2
3	Threshold cost of section 179 property before reduction in limitation (see instructions).	3
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions.	5
6	(a) Description of property	(b) Cost (business use only)
		(c) Elected cost
7	Listed property. Enter the amount from line 29.	7
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7.	8
9	Tentative deduction. Enter the smaller of line 5 or line 8.	9
10	Carryover of disallowed deduction from line 13 of your 2013 Form 4562.	10
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instrs.).	11
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11.	12
13	Carryover of disallowed deduction to 2015. Add lines 9 and 10, less line 12.	13

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)** (See instructions.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions).	14
15	Property subject to section 168(f)(1) election.	15
16	Other depreciation (including ACRS).	16
		97,781.

**Part III MACRS Depreciation (Do not include listed property.)** (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2014.	17
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here. <input type="checkbox"/>	

**Section B — Assets Placed in Service During 2014 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only — see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27.5 yrs	MM	S/L	
i Nonresidential real property			27.5 yrs	MM	S/L	
			39 yrs	MM	S/L	
				MM	S/L	

**Section C — Assets Placed in Service During 2014 Tax Year Using the Alternative Depreciation System**

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

**Part IV Summary** (See instructions.)

21	Listed property. Enter amount from line 28.	21
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations — see instructions.	22
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.	23
		97,781.

BAA For Paperwork Reduction Act Notice, see separate instructions.

FDIZ0812L 06/24/14

Form **4562** (2014)

2014

## FEDERAL WORKSHEETS

PAGE 1

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

RENTAL INCOME WORKSHEET  
FORM 990

## COMMERCIAL RENTAL INCOME

GROSS RENTAL INCOME.....	\$	89,700.
EXPENSES		
INTEREST.....		1,204.
TAXES.....		19,399.
TOTAL EXPENSES.....	\$	20,603.
NET RENTAL INCOME OR LOSS	\$	<u>69,097.</u>

## COMPUTATION OF COST OF GOODS SOLD (FORM 990)

1. INVENTORY AT START OF YEAR.....	30,248.
2. PURCHASES.....	60,991.
3. COST OF LABOR.....	0.
4. ADDITIONAL 263A COSTS.....	0.
5. OTHER COSTS.....	60,219.
6. TOTAL (ADD LINES 1 THROUGH 5).....	151,458.
7. INVENTORY AT END OF YEAR.....	36,714.
8. COST OF GOODS SOLD (SUBTRACT LINE 7 FROM LINE 6).....	<u>114,744.</u>

FORM 990, PART III, LINE 4E  
PROGRAM SERVICES TOTALS

	PROGRAM SERVICES TOTAL	FORM 990	SOURCE
TOTAL EXPENSES	1,756,739.	1,756,739.	PART IX, LINE 25, COL. B
GRANTS	0.	0.	PART IX, LINES 1-3, COL. B
REVENUE	476,156.	601,217.	PART VIII, LINE 2, COL. A

FORM 990, PART IX, LINE 11G  
OTHER FEES FOR SERVICES

	(A) TOTAL	(B) PROGRAM SERVICES	(C) MANAGEMENT & GENERAL	(D) FUND- RAISING
PROFESSIONAL FEES	112,660.	38,215.	50,799.	23,646.
TOTAL	<u>\$ 112,660.</u>	<u>\$ 38,215.</u>	<u>\$ 50,799.</u>	<u>\$ 23,646.</u>

2014

## FEDERAL WORKSHEETS

PAGE 2

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

FORM 990, PART IX, LINE 24E  
OTHER EXPENSES

	(A) TOTAL	(B) PROGRAM SERVICES	(C) MANAGEMENT & GENERAL	(D) FUNDRAISING
BANK FEES	19,230.	5,974.	12,975.	281.
BUILDING MAINTENANCE & REPAIRS	66,620.	55,964.	7,188.	3,468.
COLLECTIONS	14,949.	14,949.		
DONOR BENEFITS	4,348.	1,304.	1,566.	1,478.
DUES & SUBSCRIPTIONS	18,998.	12,211.	4,689.	2,098.
EQUIPMENT RENTAL	38,397.	34,144.	2,924.	1,329.
HOSPITALITY & CATERING	44,081.	41,225.	1,324.	1,532.
IN-KIND EXPENSES	2,000.		2,000.	
MISCELLANEOUS EXPENSES	1,278.	551.	107.	620.
PAYROLL PROCESSING	5,640.		5,640.	
POSTAGE AND SHIPPING	18,570.	6,040.	576.	11,954.
PROFESSIONAL DEVELOPMENT	697.	320.	80.	297.
PROGRAM COSTS	11,423.	11,143.	236.	44.
SECURITY	13,047.	11,717.	538.	792.
TELEPHONE	9,103.	6,071.	1,775.	1,257.
TOTAL	\$ 268,381.	\$ 201,613.	\$ 41,618.	\$ 25,150.

EXCESS CONTRIBUTIONS  
SCHEDULE A, PART II, LINE 5

	2010	2011	2012	2013	2014	TOTAL	2% AMT	EXCESS
THE LEGLER BENBOUGH FOUNDATION	0	0	700,000	20,507	15,000	735,507	194,520	540,987
LEHMAN TRUST	0	0	409,287	0	0	409,287	194,520	214,767
EDDY NEWELL TRUST	0	0	378,000	0	0	378,000	194,520	183,480
DONNA SEFTON	250,000	0	0	667,000	0	917,000	194,520	722,480
PRICE CHARITIES - SITP	105,020	62,685	42,013	62,024	41,523	313,265	194,520	118,745
DYSON ESTATE	0	0	250,000	11,071	0	261,071	194,520	66,551
SDG&E	80,000	0	27,500	0	0	107,500	0	0
SCOTT MCMILLIN	87,840	85,848	98,688	77,730	0	350,106	194,520	155,586
BALBOA PARK CELEBRATION	78,536	66,233	14,102	0	0	158,871	0	0
	<u>601,396</u>	<u>214,766</u>	<u>1,919,590</u>	<u>838,332</u>	<u>56,523</u>	<u>3,630,607</u>	<u>136,164</u>	<u>200,259</u>

Form **990-T****Exempt Organization Business Income Tax Return**  
(and proxy tax under section 6033(e))

OMB No. 1545-0687

**2014**For calendar year 2014 or other tax year beginning 7/01, 2014, and ending 6/30, 2015► Information about Form 990-T and its instructions is available at [www.irs.gov/form990t](http://www.irs.gov/form990t).

► Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

Department of the Treasury  
Internal Revenue ServiceOpen to Public Inspection for  
501(c)(3) Organizations Only

<b>A</b> <input type="checkbox"/> Check box if address changed	<b>Print or Type</b> SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER 1649 EL PRADO #3 SAN DIEGO, CA 92101	<input type="checkbox"/> Check box if name changed and see instructions.	<b>D</b> Employer identification number (Employees' trust, see instructions.)  95-1728991
<b>B</b> Exempt under section <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 408(e) <input type="checkbox"/> 220(e) <input type="checkbox"/> 408A <input type="checkbox"/> 530(a) <input type="checkbox"/> 529(a)		<b>E</b> Unrelated business activity codes (See instructions.)  532000	
<b>C</b> Book value of all assets at end of year 5,430,168.		<b>F</b> Group exemption number (See instructions.)►	
		<b>G</b> Check organization type. . . . <input checked="" type="checkbox"/> 501(c) corporation <input type="checkbox"/> 501(c) trust <input type="checkbox"/> 401(a) trust <input type="checkbox"/> Other trust	

**H** Describe the organization's primary unrelated business activity.

► COMMERCIAL FACILITY RENTAL

**I** During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group? . . . ☐ Yes ☒ No  
If 'Yes,' enter the name and identifying number of the parent corporation . . . ►**J** The books are in care of ► **BILL LAWRENCE** Telephone number ► (619) 232-6203

<b>Part I Unrelated Trade or Business Income</b>		(A) Income	(B) Expenses	(C) Net
1 a Gross receipts or sales. . . . .	1 c			
b Less returns and allowances. . . . . c Balance ►	2			
2 Cost of goods sold (Schedule A, line 7) . . . . .	3			
3 Gross profit. Subtract line 2 from line 1c . . . . .	4 a			
4 a Capital gain net income (attach Schedule D) . . . . .	4 b			
b Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797) . . . . .	4 c			
c Capital loss deduction for trusts . . . . .	5			
5 Income (loss) from partnerships and S corporations (attach statement) . . . . .	6			
6 Rent income (Schedule C) . . . . .	7	7,995.	2,224.	5,771.
7 Unrelated debt-financed income (Schedule E) . . . . .	8			
8 Interest, annuities, royalties, and rents from controlled organizations (Schedule F) . . . . .	9			
9 Investment income of a section 501(c)(7), (9), or (17) organization (Sch G) . . . . .	10			
10 Exploited exempt activity income (Schedule I) . . . . .	11			
11 Advertising income (Schedule J) . . . . .	12			
12 Other income (See instructions; attach schedule) . . . . .	13	7,995.	2,224.	5,771.
13 <b>Total.</b> Combine lines 3 through 12 . . . . .				

**Part II Deductions Not Taken Elsewhere** (See instructions for limitations on deductions.) (Except for contributions, deductions must be directly connected with the unrelated business income.)

14 Compensation of officers, directors, and trustees (Schedule K) . . . . .	14	
15 Salaries and wages . . . . .	15	
16 Repairs and maintenance . . . . .	16	
17 Bad debts . . . . .	17	
18 Interest (attach schedule) . . . . .	18	
19 Taxes and licenses . . . . .	19	
20 Charitable contributions (See instructions for limitation rules) . . . . .	20	
21 Depreciation (attach Form 4562) . . . . .	21	4,356.
22 Less depreciation claimed on Schedule A and elsewhere on return . . . . .	22a	4,356.
23 Depletion . . . . .	23	
24 Contributions to deferred compensation plans . . . . .	24	
25 Employee benefit programs . . . . .	25	
26 Excess exempt expenses (Schedule I) . . . . .	26	
27 Excess readership costs (Schedule J) . . . . .	27	
28 Other deductions (attach schedule) . . . . .	28	
29 <b>Total deductions.</b> Add lines 14 through 28 . . . . .	29	
30 Unrelated business taxable income before net operating loss deduction. Subtract line 29 from line 13 . . . . .	30	5,771.
31 Net operating loss deduction (limited to the amount on line 30) . . . . .	31	
32 Unrelated business taxable income before specific deduction. Subtract line 31 from line 30 . . . . .	32	5,771.
33 Specific deduction (Generally \$1,000, but see line 33 instructions for exceptions) . . . . .	33	1,000.
34 <b>Unrelated business taxable income.</b> Subtract line 33 from line 32. If line 33 is greater than line 32, enter the smaller of zero or line 32. . . . .	34	4,771.

**Part III Tax Computation**

**35 Organizations Taxable as Corporations.** See instructions for tax computation.  
Controlled group members (sections 1561 and 1563) check here ☐ **See instructions and:**  
**a** Enter your share of the \$50,000, \$25,000, and \$9,925,000 taxable income brackets (in that order):  
(1) \$ (2) \$ (3) \$  
**b** Enter organization's share of: (1) Additional 5% tax (not more than \$11,750) ..... \$  
(2) Additional 3% tax (not more than \$100,000) ..... \$  
**c** Income tax on the amount on line 34 ..... **35 c** 716.

**36 Trusts Taxable at Trust Rates.** See instructions for tax computation. Income tax on the amount on line 34 from: ☐ Tax rate schedule or ☐ Schedule D (Form 1041) ..... **36**

**37 Proxy tax.** See instructions ..... **37**

**38 Alternative minimum tax** ..... **38**

**39 Total.** Add lines 37 and 38 to line 35c or 36, whichever applies. .... **39** 716.

**Part IV Tax and Payments**

**40a** Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116) ..... **40 a**

**b** Other credits (see instructions) ..... **40 b**

**c** General business credit. Attach Form 3800 (see instructions) ..... **40 c**

**d** Credit for prior year minimum tax (attach Form 8801 or 8827) ..... **40 d**

**e Total credits.** Add lines 40a through 40d. .... **40 e** 0.

**41** Subtract line 40e from line 39. .... **41** 716.

**42** Other taxes. Check if from: ☐ Form 4255 ☐ Form 8611 ☐ Form 8697 ☐ Form 8866  
☐ Other (attach schedule) ..... **42**

**43 Total tax.** Add lines 41 and 42. .... **43** 716.

**44a** Payments: A 2013 overpayment credited to 2014 ..... **44 a**

**b** 2014 estimated tax payments. .... **44 b**

**c** Tax deposited with Form 8868. .... **44 c**

**d** Foreign organizations: Tax paid or withheld at source (see instructions) ..... **44 d**

**e** Backup withholding (see instructions) ..... **44 e**

**f** Credit for small employer health insurance premiums (Attach Form 8941) ..... **44 f**

**g** Other credits and payments: ☐ Form 2439 ☐ Form 4136 ☐ Other ..... **44 g**

**45 Total payments.** Add lines 44a through 44g. .... **45** 0.

**46** Estimated tax penalty (see instructions). Check if Form 2220 is attached. ☒ **46** 6.

**47 Tax due.** If line 45 is less than the total of lines 43 and 46, enter amount owed ..... **47** 722.

**48 Overpayment.** If line 45 is larger than the total of lines 43 and 46, enter amount overpaid ..... **48**

**49** Enter the amount of line 48 you want: **Credited to 2015 estimated tax** ☐ **Refunded** ☐ **49**

**Part V Statements Regarding Certain Activities and Other Information** (see instructions)

**1** At any time during the 2014 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If YES, the organization may have to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If YES, enter the name of the foreign country here ☐ ..... **Yes** **No**

**2** During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If YES, see instructions for other forms the organization may have to file. ☐ ..... **Yes** **No**

**3** Enter the amount of tax-exempt interest received or accrued during the tax year ☐ \$ 0. **Yes** **No**

**Schedule A – Cost of Goods Sold.** Enter method of inventory valuation ☐

<b>1</b> Inventory at beginning of year ..... <b>1</b>	<b>6</b> Inventory at end of year ..... <b>6</b>
<b>2</b> Purchases ..... <b>2</b>	<b>7</b> <b>Cost of goods sold.</b> Subtract line 6 from line 5. Enter here and in Part I, line 2 ..... <b>7</b>
<b>3</b> Cost of labor ..... <b>3</b>	
<b>4a</b> Additional section 263A costs (attach schedule) ..... <b>4 a</b>	<b>8</b> Do the rules of section 263A (with respect to property produced or acquired for resale) apply to the organization? ..... <b>Yes</b> <b>No</b>
<b>b</b> Other costs (attach sch) ..... <b>4 b</b>	
<b>5 Total.</b> Add lines 1 through 4b ..... <b>5</b>	

**Sign Here**

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 taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer

Date

PRESIDENT

Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ **Yes** ☐ **No****Paid Preparer Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☒ if self-employed

PTIN

Firm's name

LEAF &amp; COLE, LLP

Firm's EIN

95-2076568

Firm's address

2810 CAMINO DEL RIO SOUTH, SUITE 200  
SAN DIEGO, CA 92108-3820

Phone no.

619.294.7200

**Schedule C – Rent Income (From Real Property and Personal Property Leased With Real Property)** (see instructions)

1 Description of property		
(1)		
(2)		
(3)		
(4)		
2 Rent received or accrued		
(a) From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%)	(b) From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income)	3(a) Deductions directly connected with the income in columns 2(a) and 2(b) (attach schedule)
(1)		
(2)		
(3)		
(4)		
Total	Total	
(c) Total income. Add totals of columns 2(a) and 2(b). Enter here and on page 1, Part I, line 6, column (A) . . . . . ▶		(b) Total deductions. Enter here and on page 1, Part I, line 6, column (B) . . . . . ▶

**Schedule E – Unrelated Debt-Financed Income** (see instructions)

1 Description of debt-financed property		2 Gross income from or allocable to debt- financed property	3 Deductions directly connected with or allocable to debt-financed property <b>SEE ST 1</b>	
			(a) Straight line depreciation (attach sch)	(b) Other deductions (attach schedule)
(1) COMMERCIAL RENTAL INCOME		89,700.	4,356.	20,603.
(2)				
(3)				
(4)				
4 Amount of average acquisition debt on or allocable to debt-financed property (attach schedule)	5 Average adjusted basis of or allocable to debt-financed property (attach schedule)	6 Column 4 divided by column 5	7 Gross income reportable (column 2 x column 6)	8 Allocable deductions (column 6 x total of columns 3(a) and 3(b))
(1) 79,268.	889,396.	8.9126 %	7,995.	2,224.
(2)		%		
(3)		%		
(4)		%		
Totals . . . . . ▶			Enter here and on page 1, Part I, line 7, column (A). 7,995.	Enter here and on page 1, Part I, line 7, column (B). 2,224.
Total dividends-received deductions included in column 8 . . . . . ▶				

**Schedule F – Interest, Annuities, Royalties, and Rents From Controlled Organizations** (see instructions)

1 Name of controlled organization		2 Employer identification number	Exempt Controlled Organizations		
			3 Net unrelated income (loss) (see instructions)	4 Total of specified payments made	5 Part of column 4 that is included in the controlling organization's gross income
(1)					6 Deductions directly connected with income in column 5
(2)					
(3)					
(4)					
Nonexempt Controlled Organizations					
7 Taxable Income	8 Net unrelated income (loss) (see instructions)	9 Total of specified payments made	10 Part of column 9 that is included in the controlling organization's gross income	11 Deductions directly connected with income in column 10	
(1)					
(2)					
(3)					
(4)					
Totals . . . . . ▶			Add columns 5 and 10. Enter here and on page 1, Part I, line 8, column (A).	Add columns 6 and 11. Enter here and on page 1, Part I, line 8, column (B).	



**Schedule G – Investment Income of a Section 501(c)(7), (9), or (17) Organization** (see instructions)

1 Description of income	2 Amount of income	3 Deductions directly connected (attach schedule)	4 Set-asides (attach schedule)	5 Total deductions and set-asides (column 3 plus column 4)
(1)				
(2)				
(3)				
(4)				
Totals..... ▶		Enter here and on page 1, Part I, line 9, column (A).		Enter here and on page 1, Part I, line 9, column (B).

**Schedule I – Exploited Exempt Activity Income, Other Than Advertising Income** (see instructions)

1 Description of exploited activity	2 Gross unrelated business income from trade or business	3 Expenses directly connected with production of unrelated business income	4 Net income (loss) from unrelated trade or business (column 2 minus column 3). If a gain, compute columns 5 through 7.	5 Gross income from activity that is not unrelated business income	6 Expenses attributable to column 5	7 Excess exempt expenses (column 6 minus column 5, but not more than column 4).
(1)						
(2)						
(3)						
(4)						
Totals..... ▶		Enter here and on page 1, Part I, line 10, column (A).	Enter here and on page 1, Part I, line 10, column (B).			Enter here and on page 1, Part II, line 26.

**Schedule J – Advertising Income** (See instructions)**Part I Income From Periodicals Reported on a Consolidated Basis**

1 Name of periodical	2 Gross advertising income	3 Direct advertising costs	4 Advertising gain or (loss) (col 2 minus col 3). If a gain, compute col 5 through 7.	5 Circulation income	6 Readership costs	7 Excess readership costs (col 6 minus col 5, but not more than col 4).
(1)						
(2)						
(3)						
(4)						
Totals (carry to Part II, line (5))..... ▶						

**Part II Income From Periodicals Reported on a Separate Basis** (For each periodical listed in Part II, fill in columns 2 through 7 on a line-by-line basis.)

1 Name of periodical	2 Gross advertising income	3 Direct advertising costs	4 Advertising gain or (loss) (col 2 minus col 3). If a gain, compute cols 5 through 7.	5 Circulation income	6 Readership costs	7 Excess readership costs (col 6 minus col 5, but not more than col 4).
(1)						
(2)						
(3)						
(4)						
(5) Totals from Part I						
Totals, Part II (lines 1-5)..... ▶		Enter here and on page 1, Part I, line 11, column (A).	Enter here and on page 1, Part I, line 11, column (B).			Enter here and on page 1, Part II, line 27.

**Schedule K – Compensation of Officers, Directors, and Trustees** (see instructions)

1 Name	2 Title	3 Percent of time devoted to business	4 Compensation attributable to unrelated business
		%	
		%	
		%	
		%	
Total. Enter here and on page 1, Part II, line 14. .... ▶			

**Underpayment of Estimated Tax by Corporations**

► Attach to the corporation's tax return.

► Information about Form 2220 and its separate instructions is at [www.irs.gov/form2220](http://www.irs.gov/form2220).**2014**Name **SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER**Employer identification number  
**95-1728991****Note:** Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38 on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.**Part I Required Annual Payment**

1	Total tax (see instructions) .....	1	716.
2a	Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 .....		
2b	Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method .....		
2c	Credit for federal tax paid on fuels (see instructions) .....		
2d	<b>Total.</b> Add lines 2a through 2c .....	2d	
3	Subtract line 2d from line 1. If the result is less than \$500, <b>do not</b> complete or file this form. The corporation does not owe the penalty. ....	3	716.
4	Enter the tax shown on the corporation's 2013 income tax return (see instructions). <b>Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5.</b> .....	4	274.
5	<b>Required annual payment.</b> Enter the <b>smaller</b> of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3 .....	5	274.

**Part II Reasons for Filing** — Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty (see instructions).

- 6 ☐ The corporation is using the adjusted seasonal installment method.
- 7 ☐ The corporation is using the annualized income installment method.
- 8 ☐ The corporation is a 'large corporation' figuring its first required installment based on the prior year's tax.

**Part III Figuring the Underpayment**

	(a)	(b)	(c)	(d)	
9 <b>Installment due dates.</b> Enter in columns (a) through (d) the 15th day of the 4th ( <b>Form 990-PF filers:</b> Use 5th month), 6th, 9th, and 12th months of the corporation's tax year. ....	9	10/15/14	12/15/14	3/15/15	6/15/15
10 <b>Required installments.</b> If the box on line 6 and/or line 7 above is checked, enter the amounts from Schedule A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% of line 5 above in each column. ....	10	68.	68.	69.	69.
11 <b>Estimated tax paid or credited for each period</b> (see instructions). For column (a) only, enter the amount from line 11 on line 15. ....	11				
<b>Complete lines 12 through 18 of one column before going to the next column.</b>					
12 Enter amount, if any, from line 18 of the preceding column .....	12				
13 Add lines 11 and 12. ....	13				
14 Add amounts on lines 16 and 17 of the preceding column .....	14		68.	136.	205.
15 Subtract line 14 from line 13. If zero or less, enter -0-. ....	15	0.	0.	0.	0.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-. ....	16		68.	136.	
17 <b>Underpayment.</b> If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18 .....	17	68.	68.	69.	69.
18 <b>Overpayment.</b> If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column. ....	18				

**Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 — no penalty is owed.**

**Part IV Figuring the Penalty**

	(a)	(b)	(c)	(d)
19 Enter the date of payment or the 15th day of the 3rd month after the close of the tax year, whichever is earlier (see instructions). (Form 990-PF and Form 990-T filers: Use 5th month instead of 3rd month.)	19	11/15/15	11/15/15	11/15/15
20 Number of days from due date of installment on line 9 to the date shown on line 19	20	396	335	245
21 Number of days on line 20 after 4/15/2014 and before 7/1/2014	21			
22 Underpayment on line 17 $\times \frac{\text{Number of days on line 21}}{365} \times 3\%$	22			
23 Number of days on line 20 after 6/30/2014 and before 10/1/2014	23			
24 Underpayment on line 17 $\times \frac{\text{Number of days on line 23}}{365} \times 3\%$	24			
25 Number of days on line 20 after 9/30/2014 and before 1/1/2015	25	77	16	
26 Underpayment on line 17 $\times \frac{\text{Number of days on line 25}}{365} \times 3\%$	26	0.43	0.09	
27 Number of days on line 20 after 12/31/2014 and before 4/1/2015	27	90	90	16
28 Underpayment on line 17 $\times \frac{\text{Number of days on line 27}}{365} \times 3\%$	28	0.50	0.50	0.09
29 Number of days on line 20 after 3/31/2015 and before 7/1/2015	29	91	91	91
30 Underpayment on line 17 $\times \frac{\text{Number of days on line 29}}{365} \times 3\%$	30	0.51	0.51	0.52
31 Number of days on line 20 after 6/30/2015 and before 10/1/2015	31	92	92	92
32 Underpayment on line 17 $\times \frac{\text{Number of days on line 31}}{365} \times 3\%$	32	0.51	0.51	0.52
33 Number of days on line 20 after 9/30/2015 and before 1/1/2016	33	46	46	46
34 Underpayment on line 17 $\times \frac{\text{Number of days on line 33}}{365} \times 3\%$	34	0.26	0.26	0.26
35 Number of days on line 20 after 12/31/2015 and before 2/16/2016	35			
36 Underpayment on line 17 $\times \frac{\text{Number of days on line 35}}{365} \times \%$	36			
37 Add lines 22, 24, 26, 28, 30, 32, 34, and 36	37	2.21	1.87	1.39
38 <b>Penalty.</b> Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 33; or the comparable line for other income tax returns	38			6.

\*Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at [www.irs.gov](http://www.irs.gov). You can also call 1-800-829-4933 to get interest rate information.

Form **4562**Department of the Treasury  
Internal Revenue Service (99)**Depreciation and Amortization**  
(Including Information on Listed Property)

▶ Attach to your tax return.

▶ Information about Form 4562 and its separate instructions is at [www.irs.gov/form4562](http://www.irs.gov/form4562).

OMB No. 1545-0172

**2014**Attachment  
Sequence No. **179**Name(s) shown on return **SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER**Identifying number  
**95-1728991**

Business or activity to which this form relates

**RENTAL ACTIVITY - COMMERCIAL RENTAL INCOME****Part I Election To Expense Certain Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions).....	1	
2	Total cost of section 179 property placed in service (see instructions).....	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions).....	3	
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29.....	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7.....	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from line 13 of your 2013 Form 4562.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instrs).....	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2015. Add lines 9 and 10, less line 12.....	13	

**Note:** Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)** (See instructions.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions).....	14	
15	Property subject to section 168(f)(1) election.....	15	
16	Other depreciation (including ACRS).....	16	10,453.

**Part III MACRS Depreciation (Do not include listed property.)** (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2014.....	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here.....		<input type="checkbox"/>

**Section B - Assets Placed in Service During 2014 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only — see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19 a 3-year property.....						
b 5-year property.....						
c 7-year property.....						
d 10-year property.....						
e 15-year property.....						
f 20-year property.....						
g 25-year property.....			25 yrs		S/L	
h Residential rental property.....			27.5 yrs	MM	S/L	
i Nonresidential real property.....			39 yrs	MM	S/L	

**Section C - Assets Placed in Service During 2014 Tax Year Using the Alternative Depreciation System**

20 a Class life.....					S/L	
b 12-year.....			12 yrs		S/L	
c 40-year.....			40 yrs	MM	S/L	

**Part IV Summary** (See instructions.)

21	Listed property. Enter amount from line 28.....	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations — see instructions.....	22	10,453.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.....	23	

BAA For Paperwork Reduction Act Notice, see separate instructions.

FDI20812L 06/24/14

Form **4562** (2014)

2014

FEDERAL STATEMENTS

PAGE 1

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

STATEMENT 1  
FORM 990-T, SCHEDULE E, LINE 3B  
OTHER DEDUCTIONS ALLOCABLE TO DEBT-FINANCED PROPERTY

COMMERCIAL RENTAL INCOME

INTEREST.....	\$	1,204.
TAXES.....		19,399.
TOTAL	\$	<u>20,603.</u>

2014

FEDERAL SUPPLEMENTAL INFORMATION

PAGE 1

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

FORM 990T, SCHEDULE E, COLUMN 4  
AMOUNT OF AVERAGE ACQUISITION DEBT ON OR ALLOCABLE TO DEBT-FINANCED PROPERTY

BEGINNING BALANCE	\$90,988
ENDING BALANCE	\$67,547
	-----
AVERAGE	\$79,268

FORM 990T, SCHEDULE E, COLUMN 5  
AVERAGE ADJUSTED BASIS OF OR ALLOCABLE TO DEBT-FINANCED PROPERTY

BEGINNING BALANCE	\$894,623
ENDING BALANCE	\$884,169
	-----
AVERAGE	\$889,396

CLIENT 10-110 SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS. PCT.	CUR 179/ SDA	PRIOR 179/ SDA/ DEPR.	METHOD	LIFE	CURRENT DEPR.
RENTAL ACTIVITY - COMMERCIAL RENTAL INCOME										
IMPROVEMENTS										
11	BUILDING - DYSON	1/31/14		418,130			4,356	S/L	40	10,453
	TOTAL IMPROVEMENTS			418,130		0	4,356			10,453
	TOTAL DEPRECIATION			418,130		0	4,356			10,453
	GRAND TOTAL DEPRECIATION			418,130		0	4,356			10,453



6/30/15

## 2014 FEDERAL UNRELATED BUSINESS DEPRECIATION SCHEDULE

PAGE 1

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	BUS. PCT	COST/ BASIS	CUR 179 BONUS	SPECIAL DEPR. ALLOW	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC. BAL DEPR.	SALVAGE /BASIS REDUCT	DEPR. BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
RENTAL ACTIVITY - COMMERCIAL RENTAL INCOME																
IMPROVEMENTS																
11	BUILDING - DYSON	1/31/14			418,130						418,130	4,356	S/L	40		10,453
TOTAL IMPROVEMENTS																
					418,130	0	0	0	0	0	418,130	4,356				10,453
TOTAL DEPRECIATION																
					418,130	0	0	0	0	0	418,130	4,356				10,453
GRAND TOTAL DEPRECIATION																
					418,130	0	0	0	0	0	418,130	4,356				10,453

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

OMB No. 1545-0976

Form **990-W**

FOR FORM 990-T PURPOSES

**Estimated Tax on Unrelated Business Taxable  
Income for Tax-Exempt Organizations**  
(and on Investment Income for Private Foundations)

**2015**

(Worksheet)

Department of the Treasury  
Internal Revenue Service

(Keep for your records. Do not send to the Internal Revenue Service.)

1	Unrelated business taxable income expected in the tax year.....	1	4,771.
2	Tax on the amount on line 1. See instructions for tax computation.....	2	716.
3	Alternative minimum tax (see instructions).....	3	
4	Total. Add lines 2 and 3.....	4	716.
5	Estimated tax credits (see instructions).....	5	
6	Subtract line 5 from line 4.....	6	716.
7	Other taxes (see instructions).....	7	
8	Total. Add lines 6 and 7.....	8	716.
9	Credit for federal tax paid on fuels (see instructions).....	9	
10a	Subtract line 9 from line 8. <b>Note.</b> If less than \$500, the organization is not required to make estimated tax payments. Private foundations, see instructions.....	10a	716.
b	Enter the tax shown on the 2014 return (see instructions). <b>Caution.</b> If zero or the tax year was for less than 12 months, skip this line and enter the amount from line 10a on line 10c.....	10b	
c	<b>2015 Estimated Tax.</b> Enter the smaller of line 10a or line 10b. If the organization is required to skip line 10b, enter the amount from line 10a on line 10c.....	10c	800.

		(a)	(b)	(c)	(d)	
11	<b>Installment due dates</b> (see instructions).....	11	10/15/15	12/15/15	3/15/16	6/15/16
12	<b>Required installments.</b> Enter 25% of line 10c in columns (a) through (d) unless the organization uses the annualized income installment method, the adjusted seasonal installment method, or is a 'large organization.' (see instructions).....	12	200.	200.	200.	200.
13	<b>2014 Overpayment</b> (see instructions).....	13	0.	0.	0.	0.
14	<b>Payment due</b> (Subtract line 13 from line 12).....	14	200.	200.	200.	200.

BAA For Paperwork Reduction Act Notice, see instructions.

Form **990-W** (2015)

6/30/15

## 2014 FEDERAL BOOK SUMMARY DEPRECIATION SCHEDULE

PAGE 1

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DBA SAN DIEGO HISTORY CENTER

95-1728991

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NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS. PCT.	CUR 179/ SDA	PRIOR 179/ SDA/ DEPR.	METHOD	LIFE	CURRENT DEPR.
DEPR. SCHEDULE ONLY										
FURNITURE AND FIXTURES										
2	FURNITURE & FIXTURES	VARIOUS		274,032			273,997	S/L	7	35
	TOTAL FURNITURE AND FIXTURE			274,032		0	273,997			35
IMPROVEMENTS										
1	LEASHOLD IMPROVEMENTS	VARIOUS		2,887,712			1,397,006	S/L	40	57,262
11	BUILDING - DYSON	1/31/14		418,130			4,355	S/L	40	10,453
15	STORAGE CAGE	1/16/14		3,168			39	S/L	40	79
27	REAR GALLERY FLOOR	7/31/14		9,880				S/L	40	247
29	FENCE IMPROVEMENTS	12/02/14		1,875				S/L	40	27
30	FOYER CARPET REPLACEMENT	1/26/15		5,000				S/L	40	63
	TOTAL IMPROVEMENTS			3,325,765		0	1,401,400			68,131
LAND										
12	LAND - DYSON	1/31/14		480,847				S/L		0
	TOTAL LAND			480,847		0	0			0
MACHINERY AND EQUIPMENT										
4	EQUIPMENT	VARIOUS		683,511			663,182	S/L	7	5,969
6	COMPUTER AND MONITOR	8/15/12		1,083			297	S/L	7	155
7	CAMERA	10/11/12		2,065			516	S/L	7	295
8	SERVER	11/15/12		1,304			310	S/L	7	186
9	HARD DRIVE	11/28/12		1,801			407	S/L	7	257
10	EQUIPMENT UPGRADE	5/15/13		16,238			2,707	S/L	7	2,320
16	COMPUTER AND PRINTER	9/11/13		1,611			192	S/L	7	230
17	CAMERA AND SCANNER	9/13/13		851			101	S/L	7	122
18	COMPUTER MONITOR	11/05/13		1,021			97	S/L	7	146
19	HD LAPTOPS	3/10/14		1,535			73	S/L	7	219
20	AIR COMPRESSOR	3/28/14		535			19	S/L	7	76
21	DELL MONITORS	6/16/14	1/01/15	1,160				S/L	7	83
22	CONDENSER MICROPHONE	6/16/14	1/31/15	2,400				S/L	7	200
23	CLOUD SERVER	6/16/14	1/31/15	10,899				S/L	7	908
24	MAC PRO	6/17/14	1/01/15	7,826				S/L	7	666
25	MAC HARD DRIVE	6/18/14	1/31/15	816				S/L	7	68

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## 2014 FEDERAL BOOK SUMMARY DEPRECIATION SCHEDULE

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95-1728991

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26	CAMERA AND LAVALIER SYSTE	6/26/14	1/31/15	9,884				S/L	7	824
31	APPLE COMPUTER	10/13/14		1,323				S/L	3	331
32	EVTS MGR COMPUTER TOWER	6/24/15		632				S/L	3	18
TOTAL MACHINERY AND EQUIPME				746,495		0	667,901			13,073
MISCELLANEOUS										
3	EXHIBITS	VARIOUS		722,129			712,566	S/L	7	9,563
5	SOFTWARE	VARIOUS		31,354			31,182	S/L	3	172
13	DONOR DISPLAY SIGNS	6/30/14		5,400				S/L	7	771
14	GRAPHIC FRAMES	6/30/14		40,108				S/L	7	5,730
33	LIGHTING UNITS	10/09/14		2,857				S/L	7	306
TOTAL MISCELLANEOUS				801,848		0	743,748			16,542
TOTAL DEPRECIATION				5,628,987		0	3,087,046			97,781
GRAND TOTAL DEPRECIATION				5,628,987		0	3,087,046			97,781
DEPRECIATION ASSETS SOLD				32,985		0	0			2,749
DEPR REMAINING ASSETS				5,596,002		0	3,087,046			95,032

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IMPROVEMENTS										
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	TOTAL IMPROVEMENTS			418,130		0	4,356			10,453
	TOTAL DEPRECIATION			418,130		0	4,356			10,453
	GRAND TOTAL DEPRECIATION			418,130		0	4,356			10,453

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## 2014 CALIFORNIA BOOK SUMMARY DEPRECIATION SCHEDULE

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	TOTAL IMPROVEMENTS			3,325,765		0	1,401,400			68,131
LAND										
12	LAND - DYSON	1/31/14		480,847				S/L		0
	TOTAL LAND			480,847		0	0			0
MACHINERY AND EQUIPMENT										
4	EQUIPMENT	VARIOUS		683,511			663,182	S/L	7	5,969
6	COMPUTER AND MONITOR	8/15/12		1,083			297	S/L	7	155
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25	MAC HARD DRIVE	6/18/14	1/31/15	816				S/L	7	68

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## 2014 CALIFORNIA BOOK SUMMARY DEPRECIATION SCHEDULE

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GRAND TOTAL DEPRECIATION				5,628,987		0	3,087,046			97,781
DEPRECIATION ASSETS SOLD				32,985		0	0			2,749
DEPR REMAINING ASSETS				5,596,002		0	3,087,046			95,032

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## 2014 CALIFORNIA UNRELATED BUSINESS DEPRECIATION SCHEDULE

PAGE 1

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SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

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NO.	DESCRIPTION	DATE ACQUIRED	DATE SOLD	COST/ BASIS	BUS. PCT.	CUR 179 BONUS	SPECIAL DEPR. ALLOW.	PRIOR 179/ BONUS/ SP. DEPR.	PRIOR DEC. BAL DEPR.	SALVAGE /BASIS REDUCT.	DEPR. BASIS	PRIOR DEPR.	METHOD	LIFE	RATE	CURRENT DEPR.
RENTAL ACTIVITY - COMMERCIAL RENTAL INCOME																
IMPROVEMENTS																
11	BUILDING - DYSON	1/31/14		418,130							418,130	4,356		S/L	40	10,453
TOTAL IMPROVEMENTS				418,130		0	0	0	0	0	418,130	4,356				10,453
TOTAL DEPRECIATION				418,130		0	0	0	0	0	418,130	4,356				10,453
GRAND TOTAL DEPRECIATION				418,130		0	0	0	0	0	418,130	4,356				10,453



TAXABLE YEAR

2014

# California Exempt Organization Annual Information Return

FORM

199

Calendar Year 2014 or fiscal year beginning (mm/dd/yyyy) 7/01/2014, and ending (mm/dd/yyyy) 6/30/2015.

Corporation/Organization name SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER		California corporation number 0131792
Additional information. See instructions.		FEIN 95-1728991
Street address (suite or room) 1649 EL PRADO #3		PMB no.
City SAN DIEGO	State CA	ZIP code 92101
Foreign country name	Foreign province/state/county	Foreign postal code

<p><b>A</b> First Return ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>B</b> Amended Return ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>C</b> IRC Section 4947(a)(1) trust ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>D</b> Final Information Return? <input type="checkbox"/> Dissolved <input type="checkbox"/> Surrendered (Withdrawn)  <input type="checkbox"/> Merged/Reorganized  Enter date (mm/dd/yyyy) .....</p> <p><b>E</b> Check accounting method:  1 <input type="checkbox"/> Cash 2 <input checked="" type="checkbox"/> Accrual 3 <input type="checkbox"/> Other</p> <p><b>F</b> Federal return filed?  1 <input checked="" type="checkbox"/> 990T 2 <input type="checkbox"/> 990-PF 3 <input type="checkbox"/> Sch H (990)</p> <p><b>G</b> Is this a group filing? See instructions ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>H</b> Is this organization in a group exemption? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  If 'Yes,' what is the parent's name? .....</p> <p><b>I</b> Did the organization have any changes to its guidelines not reported to the FTB? See instructions ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p><b>J</b> If exempt under R&amp;TC Section 23701d, has the organization engaged in political activities? See instructions ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>K</b> Is the organization exempt under R&amp;TC Section 23701g? ... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  If 'Yes,' enter the gross receipts from nonmember sources ..... \$ .....</p> <p><b>L</b> If organization is exempt under R&amp;TC Section 23701d and meets the filing fee exception, check box.  No filing fee is required. .... <input checked="" type="checkbox"/></p> <p><b>M</b> Is the organization a Limited Liability Company? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>N</b> Did the organization file Form 100 or Form 109 to report taxable income? ..... <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>O</b> Is the organization under audit by the IRS or has the IRS audited in a prior year? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>P</b> Is an IRS Form 1023/1024 pending? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  Date filed with IRS .....</p>
--	---

CACA1112L 07/30/15

## Part I Complete Part I unless not required to file this form. See General Instructions B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8. ....	930,888.
	2	Gross dues and assessments from members and affiliates. ....	151,030.
	3	Gross contributions, gifts, grants, and similar amounts received. .... SEE SCH. B	2,742,694.
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$50,000, see General Instruction B ...	3,824,612.
	5	Cost of goods sold. ....	114,744.
	6	Cost or other basis, and sales expenses of assets sold. ....	30,236.
	7	Total costs. Add line 5 and line 6. ....	144,980.
	8	Total gross income. Subtract line 7 from line 4. ....	3,679,632.
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18. ....	2,794,836.
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8. ....	884,796.
Filing Fee	11	Filing fee \$10 or \$25. See General Instruction F. ....	
	12	Total payments. ....	
	13	Penalties and interest. See General Instruction J. ....	
	14	Use tax. See General Instruction K. ....	
	15	Balance due. Add line 11, line 13, and line 14. Then subtract line 12 from the result. ....	
Sign Here	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 taxpayer) is based on all information of which preparer has any knowledge.		
	Signature of officer	Title PRESIDENT	Date
Paid Preparer's Use Only	Preparer's signature	STEVEN W. NORTHCOTE	Date
	Firm's name (or yours, if self-employed) and address	LEAF & COLE, LLP 2810 CAMINO DEL RIO SOUTH, SUITE 200 SAN DIEGO, CA 92108-3820	Check if self-employed <input checked="" type="checkbox"/>
			Telephone (619) 232-6203
			PTIN P00085554
			FEIN 95-2076568
May the FTB discuss this return with the preparer shown above? See instructions. ....			<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

**Part II Organizations with gross receipts of more than \$50,000 and private foundations**  
**regardless of amount of gross receipts — complete Part II or furnish substitute information.**

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions.	•	1	312,311.
	2	Interest	•	2	
	3	Dividends	•	3	3,590.
	4	Gross rents	•	4	89,700.
	5	Gross royalties	•	5	3,308.
	6	Gross amount received from sale of assets (See instructions)	•	6	
	7	Other income. Attach schedule. SEE STATEMENT 1	•	7	521,979.
Expenses and Disbursements	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	•	8	930,888.
	9	Contributions, gifts, grants, and similar amounts paid. Attach schedule	•	9	
	10	Disbursements to or for members	•	10	
	11	Compensation of officers, directors, and trustees. Attach schedule	•	11	92,085.
	12	Other salaries and wages	•	12	898,159.
	13	Interest	•	13	
	14	Taxes	•	14	85,051.
	15	Rents	•	15	
	16	Depreciation and depletion (See instructions)	•	16	91,822.
	17	Other Expenses and Disbursements. Attach schedule. SEE STATEMENT 2	•	17	1,627,719.
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	•	18	2,794,836.

**Schedule L Balance Sheets****Beginning of taxable year****End of taxable year**

Assets	(a)	(b)	(c)	(d)
1 Cash		385,890.	•	1,573,728.
2 Net accounts receivable		1,004,139.	•	775,040.
3 Net notes receivable			•	
4 Inventories		30,248.	•	36,714.
5 Federal and state government obligations		100,377.	•	29,492.
6 Investments in other bonds			•	
7 Investments in stock STMT 3		371,576.	•	180,585.
8 Mortgage loans			•	
9 Other investments. Attach schedule ST 4		168,421.	•	368,019.
10a Depreciable assets	5,126,573.		5,115,155.	
b Less accumulated depreciation	3,087,044.	2,039,529.	3,182,078.	1,933,077.
11 Land		480,847.	•	480,847.
12 Other assets. Attach schedule STM 5		33,099.	•	52,666.
13 Total assets		4,614,126.		5,430,168.
<b>Liabilities and net worth</b>				
14 Accounts payable		227,650.	•	248,068.
15 Contributions, gifts, or grants payable			•	
16 Bonds and notes payable ST 6		90,988.	•	67,548.
17 Mortgages payable			•	
18 Other liabilities. Attach schedule STM 7		45,783.		38,867.
19 Capital stock or principal fund		4,249,705.	•	5,075,685.
20 Paid-in or capital surplus. Attach reconciliation			•	
21 Retained earnings or income fund			•	
22 Total liabilities and net worth		4,614,126.		5,430,168.

**Schedule M-1 Reconciliation of income per books with income per return**

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000.

1 Net income per books	•	825,980.	7 Income recorded on books this year not included in this return. Attach schedule SEE ST 10	•	3,345.
2 Federal income tax	•		8 Deductions in this return not charged against book income this year.		
3 Excess of capital losses over capital gains	•		Attach schedule	•	
4 Income not recorded on books this year. Attach schedule SEE ST 8	•	57,687.	9 Total. Add line 7 and line 8		3,345.
5 Expenses recorded on books this year not deducted in this return. Attach schedule SEE ST 9	•	4,474.	10 Net income per return. Subtract line 9 from line 6		884,796.
6 Total. Add line 1 through line 5		888,141.			

**Schedule B**  
**(Form 990, 990-EZ,**  
**or 990-PF)**

Department of the Treasury  
Internal Revenue Service

CALIFORNIA COPY  
**Schedule of Contributors**

► **Attach to Form 990, Form 990-EZ, or Form 990-PF**

► Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Name of the organization **SAN DIEGO HISTORICAL SOCIETY**  
**DBA SAN DIEGO HISTORY CENTER**

Employer identification number

**95-1728991**

**Organization type** (check one):

**Filers of:**

Form 990 or 990-EZ

**Section:**

- ☒ 501(c)( 3 ) (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 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 33-1/3% 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990EZ,**  
**or 990-PF.**

Schedule **B** (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALICE MILLER 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	JANET KLAUBER 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	JAMES & MARY JANE WISHLER 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	ASH, JUNE BARRYMORE 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	ALBERT TREPTE 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	ANNE L EVANS 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

SAN DIEGO HISTORICAL SOCIETY

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	PETER LADOW 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	MAGGIE WARNER 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9	BARNEY & BARNEY 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
10	LYON CORP 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
11	FRAZEE 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
12	SDGE 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 20,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13	CHASE GROUP 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 10,669.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
14	GILDRED DEVELOPMENT COMPANY 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
15	RESMED 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
16	HAZARD CONSTRUCTION COMPANY 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
17	DAVID WHITMIRE HEARST JR. FOUNDATIO 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 50,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
18	PRICE PHILANTHROPIES FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 55,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
19	ANONYMOUS #8 FUND 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
20	SZKELY FAMILY FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
21	DR. SUESS FUND AT THE SD FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
22	THE LEGLER BENBOUGH FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
23	LJ GALINSON ADVISED FUND - JCF 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
24	ROBERT GOLDEN FOUNDATON 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
25	CLAUDE & DIANNA HUDNALL FUND 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
26	THE CHARLES & RANDI WAX FUND - JCF 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 12,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
27	THE ROBERT D.L. GARDINER FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
28	JANE & THOMPSON FETTER FUND -SDF 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
29	RITA'S SAN DIEGO CHARITABLE FOUNDAT 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
30	HUNTE FUND 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 150,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
31	THOMAS ACKERMAN FOUNDATION GRANT 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
32	PAUL BECHTNER FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 35,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
33	PHILIP KLAUBER - SD FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 200,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
34	MILBURN FAMILY TRUST 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 400,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
35	PHYLLIS PAUL TRUST 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 617,445.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
36	SAMUEL & KATHERINE FRENCH FUND 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 7,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
37	MR. A FENNER MILTON 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 12,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
38	DAVID C. COPLEY FOUNDATION 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
39	STAITE ENGINEERING 1649 EL PRADO SUITE 3 SAN DIEGO, CA 92101	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

SAN DIEGO HISTORICAL SOCIETY

95-1728991

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization

SAN DIEGO HISTORICAL SOCIETY

Employer identification number

95-1728991

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8) or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ..... \$ N/A

Use duplicate copies of Part III if additional space is needed.

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

**2014****Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W. FORM 3885 ONLY

Corporation name

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

California corporation number

0131792

**Part I Election to Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost)	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.	9	
10	Carryover of disallowed deduction from prior taxable years.	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.	12	
13	Carryover of disallowed deduction to 2015. Add line 9 and line 10, less line 12.	13	

**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	LEASHOLD IMPROV	VARIOUS	2,887,712.	1,397,006.	S/L	40	57,262.	
	FURNITURE & FIX	VARIOUS	274,032.	273,997.	S/L	7	35.	
	EXHIBITS	VARIOUS	722,129.	712,566.	S/L	7	9,563.	
	EQUIPMENT	VARIOUS	683,511.	663,182.	S/L	7	5,969.	
	SOFTWARE	VARIOUS	31,354.	31,182.	S/L	3	172.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).						15	97,781.

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.)	18	

**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 12.						22

**2014 Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W. FORM 3885 ONLY

Corporation name <b>SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER</b>	California corporation number <b>0131792</b>
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**Part I Election to Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.	9	
10	Carryover of disallowed deduction from prior taxable years.	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.	12	
13	Carryover of disallowed deduction to 2015. Add line 9 and line 10, less line 12.	13	

**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	COMPUTER AND MO	8/15/2012	1,083.	297.	S/L	7	155.	
	CAMERA	10/11/2012	2,065.	516.	S/L	7	295.	
	SERVER	11/15/2012	1,304.	310.	S/L	7	186.	
	HARD DRIVE	11/28/2012	1,801.	407.	S/L	7	257.	
	EQUIPMENT UPGRA	5/15/2013	16,238.	2,707.	S/L	7	2,320.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).						15	

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.)	18	

**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 12.						22

**2014****Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W. FORM 3885 ONLY

Corporation name

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

California corporation number

0131792

**Part I Election to Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2015. Add line 9 and line 10, less line 12.....	13	

**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	BUILDING - DYSO	1/31/2014	418,130.	4,355.	S/L	40	10,453.	
	LAND - DYSON	1/31/2014	480,847.			0		
	DONOR DISPLAY S	6/30/2014	5,400.		S/L	7	771.	
	GRAPHIC FRAMES	6/30/2014	40,108.		S/L	7	5,730.	
	STORAGE CAGE	1/16/2014	3,168.	39.	S/L	40	79.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 12.....						22

**2014 Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W. FORM 3885 ONLY

Corporation name <b>SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER</b>	California corporation number <b>0131792</b>
--	---

**Part I Election to Expense Certain Property Under IRC Section 179**

<b>1</b>	Maximum deduction under IRC Section 179 for California.....	<b>1</b>	\$25,000
<b>2</b>	Total cost of IRC Section 179 property placed in service.....	<b>2</b>	
<b>3</b>	Threshold cost of IRC Section 179 property before reduction in limitation.....	<b>3</b>	\$200,000
<b>4</b>	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	<b>4</b>	
<b>5</b>	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	<b>5</b>	
<b>6</b>	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
<b>7</b>	Listed property (elected IRC Section 179 cost).....	<b>7</b>	
<b>8</b>	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	<b>8</b>	
<b>9</b>	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	<b>9</b>	
<b>10</b>	Carryover of disallowed deduction from prior taxable years.....	<b>10</b>	
<b>11</b>	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	<b>11</b>	
<b>12</b>	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	<b>12</b>	
<b>13</b>	Carryover of disallowed deduction to 2015. Add line 9 and line 10, less line 12.....	<b>13</b>	

**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

<b>14</b>	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	COMPUTER AND PR	9/11/2013	1,611.	192.	S/L	7	230.	
	CAMERA AND SCAN	9/13/2013	851.	101.	S/L	7	122.	
	COMPUTER MONITO	11/05/2013	1,021.	97.	S/L	7	146.	
	HD LAPTOPS	3/10/2014	1,535.	73.	S/L	7	219.	
	AIR COMPRESSOR	3/28/2014	535.	19.	S/L	7	76.	
<b>15</b>	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						<b>15</b>	

**Part III Summary**

<b>16</b>	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	<b>16</b>	
<b>17</b>	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	<b>17</b>	
<b>18</b>	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	<b>18</b>	

**Part IV Amortization**

<b>19</b>	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
<b>20</b>	Total. Add the amounts in column (g).....						<b>20</b>
<b>21</b>	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						<b>21</b>
<b>22</b>	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 12.....						<b>22</b>



**2014****Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W. FORM 3885 ONLY

Corporation name <b>SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER</b>	California corporation number <b>0131792</b>
--	---

**Part I Election to Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2015. Add line 9 and line 10, less line 12.....	13	

**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	DELL MONITORS	6/16/2014	1,160.		S/L	7	83.	
	CONDENSER MICRO	6/16/2014	2,400.		S/L	7	200.	
	CLOUD SERVER	6/16/2014	10,899.		S/L	7	908.	
	MAC PRO	6/17/2014	7,826.		S/L	7	666.	
	MAC HARD DRIVE	6/18/2014	816.		S/L	7	68.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
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18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
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**2014 Corporation Depreciation and Amortization****3885**

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Corporation name <b>SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER</b>	California corporation number <b>0131792</b>
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7	Listed property (elected IRC Section 179 cost).....	7	
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**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	CAMERA AND LAVA	6/26/2014	9,884.		S/L	7	824.	
	REAR GALLERY FL	7/31/2014	9,880.		S/L	40	247.	
	FENCE IMPROVEME	12/02/2014	1,875.		S/L	40	27.	
	FOYER CARPET RE	1/26/2015	5,000.		S/L	40	63.	
	APPLE COMPUTER	10/13/2014	1,323.		S/L	3	331.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
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**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
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**2014****Corporation Depreciation and Amortization****3885**

Attach to Form 100 or Form 100W. FORM 3885 ONLY

Corporation name

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

California corporation number

0131792

**Part I Election to Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
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12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2015. Add line 9 and line 10, less line 12.....	13	

**Part II Depreciation and Election of Additional First Year Expense Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
	EVTS MGR COMPUT	6/24/2015	632.		S/L	3	18.	
	LIGHTING UNITS	10/09/2014	2,857.		S/L	7	306.	
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
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**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
20	Total. Add the amounts in column (g).....						20
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21
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2014

## CALIFORNIA STATEMENTS

PAGE 1

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

STATEMENT 1  
FORM 199, PART II, LINE 7  
OTHER INCOME

INCOME FROM SPECIAL EVENTS.....	\$	58,848.
OTHER REVENUE.....		12,944.
PROGRAM SERVICE REVENUE.....		450,187.
TOTAL	\$	<u>521,979.</u>

STATEMENT 2  
FORM 199, PART II, LINE 17  
OTHER EXPENSES

ADVERTISING AND PROMOTION.....	\$	90,603.
BANK FEES.....		19,230.
BUILDING MAINTENANCE & REPAIRS.....		66,620.
COLLECTIONS.....		14,949.
DONOR BENEFITS.....		4,348.
DUES & SUBSCRIPTIONS.....		18,998.
EQUIPMENT RENTAL.....		38,397.
HOSPITALITY & CATERING.....		44,081.
IN-KIND EXPENSES.....		2,000.
INSURANCE.....		46,436.
LEGAL FEES.....		4,185.
MISCELLANEOUS EXPENSES.....		1,278.
OFFICE EXPENSES.....		21,341.
OTHER EMPLOYEE BENEFIT.....		129,281.
OTHER FEES.....		112,660.
OUTSIDE SERVICES.....		430,739.
PAYROLL PROCESSING.....		5,640.
POSTAGE AND SHIPPING.....		18,570.
PRINTING AND PUBLICATIONS.....		98,688.
PRODUCTION & EXHIBITION COSTS.....		228,583.
PROFESSIONAL DEVELOPMENT.....		697.
PROGRAM COSTS.....		11,423.
RENTAL EXPENSES.....		20,603.
SECURITY.....		13,047.
SPECIAL EVENT EXPENSES.....		62,639.
TELEPHONE.....		9,103.
TRAVEL.....		10,518.
UTILITIES.....		103,062.
TOTAL	\$	<u>1,627,719.</u>

STATEMENT 3  
FORM 199, SCHEDULE L, LINE 7  
INVESTMENTS IN STOCKS

CHARLES SCHWAB - MUTUAL FUNDS.....	\$	180,585.
TOTAL	\$	<u>180,585.</u>

2014

## CALIFORNIA STATEMENTS

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CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

**STATEMENT 4**  
**FORM 199, SCHEDULE L, LINE 9**  
**OTHER INVESTMENTS**

SAN DIEGO FOUNDATION-FUND 1028.....\$ 368,019.  
TOTAL \$ 368,019.

**STATEMENT 5**  
**FORM 199, SCHEDULE L, LINE 12**  
**OTHER ASSETS**

CONSTRUCTION IN PROGRESS.....22,059.  
PREPAID EXPENSES AND DEFERRED CHARGES.....30,607.  
TOTAL \$ 52,666.

**STATEMENT 6**  
**FORM 199, SCHEDULE L, LINE 16**  
**BONDS AND NOTES PAYABLE**

LENDER'S NAME: WING CHEE LO  
DATE OF NOTE: 1/15/2014  
MATURITY DATE: 1/15/2019  
INTEREST RATE: 1.5  
ORIGINAL AMOUNT: 118,645.  
BALANCE DUE: 67,548.  
  
TOTAL NOTES AND BONDS PAYABLE \$ 67,548.

**STATEMENT 7**  
**FORM 199, SCHEDULE L, LINE 18**  
**OTHER LIABILITIES**

DEFERRED REVENUE.....24,974.  
SECURITY DEPOSITS.....13,893.  
TOTAL \$ 38,867.

**STATEMENT 8**  
**FORM 199, SCHEDULE M-1, LINE 4**  
**INCOME NOT RECORDED ON BOOKS THIS YEAR**

CHANGE IN FMV OF CRUT.....\$ 57,687.  
TOTAL \$ 57,687.

2014

CALIFORNIA STATEMENTS

PAGE 3

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

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STATEMENT 9  
FORM 199, SCHEDULE M-1, LINE 5  
EXPENSES RECORDED ON BOOKS NOT DEDUCTED ON RETURN

INVESTMENT EXPENSES.....	\$	4,474.
TOTAL	\$	<u>4,474.</u>

STATEMENT 10  
FORM 199, SCHEDULE M-1, LINE 7  
INCOME RECORDED ON BOOKS NOT ON RETURN

UNREALIZED GAIN ON INVESTMENTS.....	\$	3,345.
TOTAL	\$	<u>3,345.</u>

TAXABLE YEAR

2014

# California Exempt Organization Business Income Tax Return

FORM

109

Calendar Year 2014 or fiscal year beginning (mm/dd/yyyy) 7/01/2014, and ending (mm/dd/yyyy) 6/30/2015.

Corporation/Organization name <b>SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER</b>		California corporation number <b>0131792</b>
Additional information. See instructions.		FEIN <b>95-1728991</b>
Street address (suite/room no.) <b>1649 EL PRADO #3</b>		PMB no.
City (If the corporation has a foreign address, see instructions.) <b>SAN DIEGO</b>	State <b>CA</b>	ZIP code <b>92101</b>
Foreign country name	Foreign province/state/county	Foreign postal code

<b>A</b> First Return Filed? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>B</b> Is this an education IRA within the meaning of R&TC Section 23712? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>C</b> Is the organization under audit by the IRS or has the IRS audited in a prior year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>D</b> Final Return? <input type="checkbox"/> Dissolved <input type="checkbox"/> Surrendered (Withdrawn) <input type="checkbox"/> Merged/Reorganized. Enter date (mm/dd/yyyy) <b>E</b> Amended Return <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>F</b> Accounting Method Used: (1) <input type="checkbox"/> Cash (2) <input checked="" type="checkbox"/> Accrual (3) <input type="checkbox"/> Other <b>G</b> Nature of trade or business <u>COMM'L FACILITY RENT</u>	<b>H</b> Is the organization a non-exempt charitable trust as described in IRC Section 4947(a)(1)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>I</b> Is this organization claiming any former; Enterprise Zone (EZ), Los Angeles Revitalization Zone (LARZ), Local Agency Military Base Recovery Area (LAMBRA), Targeted Tax Area (TTA), or Manufacturing Enhancement Area (MEA) tax benefits? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>J</b> Is this organization a qualified pension, profit-sharing, or stock bonus plan as described in IRC Section 401(a)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>K</b> Unrelated Business Activity (UBA) Code <b>532000</b> <b>L</b> Is this a Hospital? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' attach IRS Schedule H (Form 990)
---	---

<b>Taxable Corporation</b>	<b>1</b> Unrelated business taxable income from Side 2, Part II, line 30. <input type="checkbox"/>	<b>1</b>	<b>4,771.</b>
	<b>2</b> Multiply line 1 by the average apportionment percentage <input type="checkbox"/> % from the Schedule R, Apportionment Formula Worksheet, Part A, line 2 or Part B, line 5. See instructions. <input type="checkbox"/>	<b>2</b>	
	<b>3</b> Enter the lesser amount from line 1 or line 2. If the unrelated business activity is wholly in California and Schedule R was not completed, enter the amount from line 1. <input type="checkbox"/>	<b>3</b>	<b>4,771.</b>
<b>Taxable Trust</b>	<b>4</b> Unrelated business taxable income from Side 2, Part II, line 30. <input type="checkbox"/>	<b>4</b>	
<b>Tax Computation</b>	<b>5</b> Unrelated business taxable income from line 3 or line 4. <input type="checkbox"/>	<b>5</b>	<b>4,771.</b>
	<b>6</b> Pierce's disease, EZ, LARZ, LAMBRA, or TTA NOL carryover deduction. <input type="checkbox"/>	<b>6</b>	
	<b>7</b> Net Operating Loss deduction. See General Information N. <input type="checkbox"/>	<b>7</b>	
	<b>8</b> Add line 6 and line 7. <input type="checkbox"/>	<b>8</b>	
	<b>9</b> Net unrelated business taxable income. Subtract line 8 from line 5. <input type="checkbox"/>	<b>9</b>	<b>4,771.</b>
	<b>10</b> Tax <b>8.84 %</b> x line 9. See General Information J. <input type="checkbox"/>	<b>10</b>	<b>422.</b>
	<b>11a</b> New employment credit, amount generated <input type="checkbox"/> <b>a)</b> <input type="checkbox"/> <b>11b)</b> Amount claimed. <input type="checkbox"/>	<b>11b</b>	
	<b>c</b> Tax credits from Schedule B. See instructions. <input type="checkbox"/>	<b>11c</b>	
<b>d</b> Total Credits. Add line 11b and 11c. <input type="checkbox"/>	<b>11d</b>		
<b>Total Tax</b>	<b>12</b> Balance. Subtract line 11d from line 10. If line 11d is greater than line 10, enter -0-. <input type="checkbox"/>	<b>12</b>	<b>422.</b>
	<b>13</b> Alternative minimum tax. See General Information O. <input type="checkbox"/>	<b>13</b>	
	<b>14</b> Total tax. Add line 12 and line 13. <input type="checkbox"/>	<b>14</b>	<b>422.</b>
<b>Payments</b>	<b>15</b> Overpayment from a prior year allowed as a credit. <input type="checkbox"/>	<b>15</b>	
	<b>16</b> 2014 estimated tax payments. See instructions. <input type="checkbox"/>	<b>16</b>	
	<b>17</b> 2014 withholding (Form 592-B and/or 593.) See instructions. <input type="checkbox"/>	<b>17</b>	
	<b>18</b> Amount paid with extension (form FTB 3539). <input type="checkbox"/>	<b>18</b>	
	<b>19</b> Total payments and credits. Add line 15 through line 18. <input type="checkbox"/>	<b>19</b>	
<b>Refund (Direct Deposit of Refund) or Amount Due</b>	<b>20</b> Tax due. Subtract line 19 from line 14. Pay entire amount with return. See instructions. <input type="checkbox"/>	<b>20</b>	<b>422.</b>
	<b>21</b> Overpayment. Subtract line 14 from line 19. See instructions. <input type="checkbox"/>	<b>21</b>	
	<b>22</b> Enter amount of line 21 to be applied to 2014 estimated tax. <input type="checkbox"/>	<b>22</b>	
	<b>23</b> Use tax. See instructions. <input type="checkbox"/>	<b>23</b>	
	<b>24</b> Refund. If the sum of line 22 and line 23 is less than line 21, then subtract the total from line 21. <input type="checkbox"/>	<b>24</b>	
	<b>a</b> Fill in the account information to have the refund directly deposited. Routing number <input type="checkbox"/>	<b>24a</b>	
	<b>b</b> Type: Checking <input type="checkbox"/> Savings <input type="checkbox"/> <b>c</b> Account Number <input type="checkbox"/>	<b>24c</b>	
	<b>25</b> Penalties and interest. See General Information M. <input type="checkbox"/>	<b>25</b>	<b>10.</b>
	<b>26</b> <input type="checkbox"/> Check if estimate penalty computed using Exception B or C and attach form FTB 5806. <input type="checkbox"/>		
	<b>27</b> Total amount due. Add line 20, line 22, line 23, and line 25, then subtract line 21 from the result. <input checked="" type="radio"/>	<b>27</b>	<b>432.</b>

**Unrelated Business Taxable Income****Part I Unrelated Trade or Business Income**

1 a	Gross receipts or gross sales	b	Less returns and allowances	c	Balance	1 c	
2	Cost of goods sold and/or operations (Schedule A, line 7)					2	
3	Gross profit. Subtract line 2 from line 1c					3	
4 a	Capital gain net income. See Specific Line Instructions — Trusts attach Schedule D (541)					4 a	
b	Net gain (loss) from Part II, Schedule D-1					4 b	
c	Capital loss deduction for trusts					4 c	
5	Income (or loss) from partnerships, limited liability companies, or S corporations. See specific line instructions. Attach Schedule K-1 (565, 568, or 100S) or similar schedule					5	
6	Rental income (Schedule C)					6	
7	Unrelated debt-financed income (Schedule D)					7	5,771.
8	Investment income of an R&TC Section 23701g, 23701i, or 23701n organization (Schedule E)					8	
9	Interest, Annuities, Royalties and Rents from controlled organizations (Schedule F)					9	
10	Exploited exempt activity income (Schedule G)					10	
11	Advertising income (Schedule H, Part III, Column A)					11	
12	Other income. Attach schedule					12	
13	Total unrelated trade or business income. Add line 3 through line 12					13	5,771.

**Part II Deductions Not Taken Elsewhere** (Except for contributions, deductions must be directly connected with the unrelated business income.)

14	Compensation of officers, directors, and trustees from Schedule I					14	
15	Salaries and wages					15	
16	Repairs					16	
17	Bad debts					17	
18	Interest. Attach schedule					18	
19	Taxes. Attach schedule					19	
20	Contributions. See instructions and attach schedule					20	
21 a	Depreciation (Corporations and Associations — Schedule J) (Trusts — form FTB 3885F)	21 a					
b	Less: depreciation claimed on Schedule A. See instructions	21 b				21	
22	Depletion. Attach schedule					22	
23 a	Contributions to deferred compensation plans					23 a	
b	Employee benefit programs. See instructions					23 b	
24	Other deductions. Attach schedule					24	
25	Total deductions. Add line 14 through line 24					25	
26	Unrelated business taxable income before allowable excess advertising costs. Subtract line 25 from line 13					26	5,771.
27	Excess advertising costs (Schedule H, Part III, Column B)					27	
28	Unrelated business taxable income before specific deduction. Subtract line 27 from line 26					28	5,771.
29	Specific deduction. See instructions					29	1,000.
30	Unrelated business taxable income. Subtract line 29 from line 28. If line 28 is a loss, enter line 28					30	4,771.

<b>Sign Here</b>	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 taxpayer) is based on all information of which preparer has any knowledge.			
	Signature of officer	Title	Date	Telephone
<b>Paid Preparer's Use Only</b>	Preparer's signature	STEVEN W. NORTHCOTE	Date	PTIN
	Firm's name (or yours, if self-employed) and address		Check if self-employed <input checked="" type="checkbox"/>	P00085554
	LEAF & COLE, LLP			FEIN
	2810 CAMINO DEL RIO SOUTH, SUITE 200			95-2076568
	SAN DIEGO, CA 92108-3820			Telephone
				619.294.7200
	May the FTB discuss this return with the preparer shown above? See instructions			<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No



**Schedule A Cost of Goods Sold and/or Operations.**

Method of inventory valuation (specify) \_\_\_\_\_

1	Inventory at beginning of year .....	1	
2	Purchases .....	2	
3	Cost of labor .....	3	
4a	Additional IRC Section 263A costs. Attach schedule .....	4a	
b	Other costs. Attach schedule .....	4b	
5	Total. Add line 1 through line 4b .....	5	
6	Inventory at end of year .....	6	
7	Cost of goods sold and/or operations. Subtract line 6 from line 5. Enter here and on Side 2, Part I, line 2 ...	7	

Do the rules of IRC Section 263A (with respect to property produced or acquired for resale) apply to this organization? ☐ Yes ☒ No

**Schedule B Tax Credits.** Do not claim the New Employment Credit on Schedule B.

1	Enter credit name _____ code no. _____	1	
2	Enter credit name _____ code no. _____	2	
3	Enter credit name _____ code no. _____	3	
4	Total. Add line 1 through line 3. If claiming more than 3 credits, enter the total of all claimed credits, except New Employment Credit, on line 4. Enter here and on Side 1, line 11c .....	4	

**Schedule K Add-On Taxes or Recapture of Tax.** See instructions.

1	Interest computation under the look-back method for completed long-term contracts. Attach form FTB 3834 .....	1	
2	Interest on tax attributable to installment: <b>a</b> Sales of certain timeshares or residential lots .....	2a	
	<b>b</b> Method for non-dealer installment obligations .....	2b	
3	IRC Section 197(f)(9)(B)(ii) election to recognize gain on the disposition of intangibles .....	3	
4	Credit recapture. Credit name _____	4	
5	Total. Combine the amounts on line 1 through line 4. See instructions .....	5	

**Schedule R Apportionment Formula Worksheet.** Use only for unrelated trade or business amounts.**Part A. Standard Method — Single-Sales Factor Formula.** Complete this part only if the corporation uses the single-sales factor formula.

	(a) Total within and outside California	(b) Total within California	(c) Percent within California [(b) ÷ (a)] x 100
1 Total Sales .....			
2 Apportionment percentage. Divide total sales column (b) by total sales column (a) and multiply the result by 100. Enter the result here and on Form 109, Side 1, line 2. ....			

**Part B. Three Factor Formula.** Complete this part only if the corporation uses the three-factor formula.

	(a) Total within and outside California	(b) Total within California	(c) Percent within California [(b) ÷ (a)] x 100
1 Property factor: See instructions. ....			
2 Payroll factor: Wages and other compensation of employees. ....			
3 Sales factor: Gross sales and/or receipts less returns and allowances .....			
4 Total percentage: Add the percentages in column (c). ....			
5 Average apportionment percentage: Divide the factor on line 4 by 3 and enter the result here and on Form 109, Side 1, line 2. See instructions for exceptions. ....			

**Schedule C Rental Income from Real Property and Personal Property Leased with Real Property**

For rental income from debt-financed property, use Schedule D, R&amp;TC Section 23701g, Section 23701i, and Section 23701n organizations. See instructions for exceptions.

1	Description of property	2	Rent received or accrued	3	Percentage of rent attributable to personal property
					%
					%
					%
4	Complete if any item in column 3 is more than 50%, or for any item if the rent is determined on the basis of profit or income	5	Complete if any item in column 3 is more than 10%, but not more than 50%		
(a) Deductions directly connected (attach schedule)	(b) Income includible, column 2 less column 4(a)	(a) Gross income reportable, column 2 x column 3	(b) Deductions directly connected with personal property (att sch)	(c) Net income includible, column 5(a) less column 5(b)	

Add columns 4(b) and column 5(c). Enter here and on Side 2, Part I, line 6. ....

**Schedule D Unrelated Debt-Financed Income**

1 Description of debt-financed property		2 Gross income from or allocable to debt-financed property	3 Deductions directly connected with or allocable to debt-financed property		
			(a) Straight-line depreciation (attach schedule)	(b) Other deductions (attach schedule) ST 1	
COMMERCIAL RENTAL INCOME		89,700.	4,356.	20,603.	
4 Amount of average acquisition indebtedness on or allocable to debt-financed property (attach schedule)	5 Average adjusted basis of or allocable to debt-financed property (attach schedule)	6 Debt basis percentage, column 4 ÷ column 5	7 Gross income reportable, column 2 x column 6	8 Allocable deductions, total of columns 3(a) and 3(b) x column 6	9 Net income (or loss) includible, column 7 less column 8
79,268.	889,396.	8.913 %	7,995.	2,224.	5,771.
		%			
		%			
Total. Enter here and on Side 2, Part I, line 7. ....					5,771.

**Schedule E Investment Income of an R&TC Section 23701g, 23701i, or 23701n Organization**

1 Description	2 Amount	3 Deductions directly connected (attach schedule)	4 Net investment income, column 2 less column 3	5 Set-asides (attach schedule)	6 Balance of investment income, column 4 less column 5
Total. Enter here and on Side 2, Part I, line 8. ....					
Enter gross income from members (dues, fees, charges, or similar amounts) .....					

**Schedule F Interest, Annuities, Royalties and Rents from Controlled Organizations**

Exempt Controlled Organizations					
1 Name of controlled organizations	2 Employer Identification Number	3 Net unrelated income (loss)	4 Total of specified payments made	5 Part of column (4) that is included in the controlling organization's gross income	6 Deductions directly connected with income in column (5)
1					
2					
3					
Nonexempt Controlled Organizations					
7 Taxable Income	8 Net unrelated income (loss)	9 Total of specified payments made	10 Part of column (9) that is included in the controlling organization's gross income	11 Deductions directly connected with income in column (10)	
1					
2					
3					
4 Add columns 5 and 10 .....					
5 Add columns 6 and 11 .....					
6 Subtract line 5 from line 4. Enter here and on Side 2, Part I, line 9. ....					

**Schedule G Exploited Exempt Activity Income, other than Advertising Income**

1 Description of exploited activity (attach schedule if more than one unrelated activity is exploiting the same exempt activity)	2 Gross unrelated business income from trade or business	3 Expenses directly connected with production of unrelated business income	4 Net income from unrelated trade or business, column 2 less column 3	5 Gross income from activity that is not unrelated business income	6 Expenses attributable to column 5	7 Excess exempt expense, column 6 less column 5 but not more than column 4	8 Net income includible, column 4 less column 7 but not less than zero
Total. Enter here and on Side 2, Part I, line 10. ....							

**Schedule H Advertising Income and Excess Advertising Costs****Part I Income from Periodicals Reported on a Consolidated Basis**

1 Name of periodical	2 Gross advertising income	3 Direct advertising costs	4 Advertising income or excess advertising costs. If column 2 is greater than column 3, complete columns 5, 6, and 7. If column 3 is greater than column 2, enter the excess in Part III, column B(b). Do not complete columns 5, 6, and 7.	5 Circulation income	6 Readership costs	7 If column 5 is greater than column 6, enter the income shown in column 4, in Part III, column A(b). If column 6 is greater than column 5, subtract the sum of column 6 and column 3 from the sum of column 5 and column 2. Enter amount in Part III, column A(b). If the amount is less than zero, enter -0-.
Totals.....						

**Part II Income from Periodicals Reported on a Separate Basis**


**Part III Column A – Net Advertising Income****Part III Column B – Excess Advertising Costs**

(a) Enter 'consolidated periodical' and/or names of non-consolidated periodicals	(b) Enter total amount from Part I, column 4 or 7, and amounts listed in Part II, columns 4 and 7	(a) Enter 'consolidated periodical' and/or names of non-consolidated periodicals	(b) Enter total amount from Part I, column 4, and amounts listed in Part II, column 4
Enter total here and on Side 2, Part I, line 11. ....		Enter total here and on Side 2, Part II, line 27. ....	

**Schedule I Compensation of Officers, Directors, and Trustees**

1 Name of Officer	2 SSN or ITIN	3 Title	4 Percent of time devoted to business	5 Compensation attributable to unrelated business	6 Expense account allowances
			%		
			%		
			%		
			%		
			%		
Total. Enter here and on Side 2, Part II, line 14. ....					

**Schedule J Depreciation (Corporations and Associations only. Trusts use form FTB 3885F.)**

1 Group and guideline class or description of property	2 Date acquired (dd/mm/yyyy)	3 Cost or other basis	4 Depreciation allowed or allowable in prior years	5 Method of computing depreciation	6 Life or rate	7 Depreciation for this year
1 Total additional first-year depreciation (do not include in items below).....						
2 Other depreciation:	SEE ATTACHED DEPRECIATION SCHEDULE					
Buildings.....						
Furniture and fixtures.....						
Transportation equipment...						
Machinery and other equipment.....						
Other (specify) .....						
3 Other depreciation.....						
4 Total.....						4,356.
5 Amount of depreciation claimed elsewhere on return.....						4,356.
6 Balance. Subtract line 5 from line 4. Enter here and on Side 2, Part II, line 21a. ....						

TAXABLE YEAR

2014

# Underpayment of Estimated Tax by Corporations

CALIFORNIA FORM

5806

For calendar year 2014 or fiscal year beginning month (mm/dd/yyyy) 7/01/2014, and ending month (mm/dd/yyyy) 6/30/2015

Corporation name  
SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTERCalifornia corporation number  
0131792**Part I Figure the Underpayment**

1	Current year's tax. See instructions.	1	422.
		(a)	(b)
2	Installment due dates. See instructions.	2	10/15/14
3	Percentage required. See instructions.	3	12/15/14
4	Amount due. See instructions.	4	3/16/15
5 a	Amount paid or credited for each installment	5 a	6/15/15
5 b	Overpayment from previous installment. See instructions.	5 b	30% (not less than min.)
6	Add line 5a and line 5b.	6	70% less 1st
7	Underpayment (subtract line 6 from line 4). See instructions. Overpayment (subtract line 4 from line 6). (If line 7 shows an underpayment for any installment, go to Part IV, Exceptions Worksheets.)	7	70% less prior
			100% less prior
			127.
			127.
			127.
			127.
			127.

**Part II Exceptions to the Penalty**

If Exception A, line 8a is met for all four installments, do not attach this form to the return.

(check the applicable boxes)		Yes	No	Yes	No	Yes	No	Yes	No
8 a	Exception A — Regular Corporations, line 26.		X		X		X		X
8 b	Exception A — Large Corporations. See instructions.								
9	Exception B (line 42) met?								
10	Exception C (line 64) met?								

**Part III Figure the Penalty** If line 7 shows an underpayment for any installment and one of the three exceptions was not met, figure the penalty for that installment by completing line 11 through line 22.

11	Enter the earlier of the payment date, or the 15th day of the 3rd month after the close of the taxable year. Form 109 filers, see instructions.	11	11/16/15	11/16/15	11/16/15
12	Number of days from date shown on line 2 to date shown on line 11.	12	397	336	154
13	Number of days on line 12 before 7/01/14.	13			
14	Number of days on line 12 after 6/30/14 and before 1/01/15.	14	77	16	
15	Number of days on line 12 after 12/31/14 and before 7/01/15.	15	181	181	15
16	Number of days on line 12 after 6/30/15 and before 1/01/16. See instructions.	16	139	139	139
17	Number of days on line 12 after 12/31/15 and before 2/15/16.	17			
18	No. of days on line 13 x 3% x line 7	18			
19	No. of days on line 14 x 3% x line 7	19	0.80	0.22	
20	No. of days on line 15 x 3% x line 7	20	1.89	2.50	0.16
21	No. of days on line 16 x % (see instrs) x ln 7	21	1.45	1.92	1.45
22	No. of days on line 17 x % (see instrs) x ln 7	22			
22 a	Add amounts for each column from line 18 through line 22.	22 a	4.14	4.64	1.61
22 b	Total estimated penalty due. Add line 22a, column (a) through column (d). Enter here and on Form 100, line 42a; Form 100W, line 41a; Form 100S, line 41a; or Form 109, line 25.	22 b			10.

**Part IV Exceptions Worksheets** Even if line 7 shows an underpayment for any installment, the Franchise Tax Board (FTB) will not assess a penalty if timely payments were made and they equal or exceed the amount determined under any of the three exceptions for the same installment period.

### Exception A – Prior Year's Tax – Regular Corporations

23 Prior year's tax (the return must have been for a full 12 months).....										23		161.							
										(a)		(b)		(c)		(d)			
										30% (not less than min.)		70%		70%		100%			
24 Enter line 23 x the percentage shown...										24		48.		113.		113.		161.	
25 Amount paid by the installment due date (cumulative).....										25									
26 If line 25 is greater than line 24, the exception was met. Check 'Yes' here and check the applicable 'Yes' box in Part II, line 8a. If line 24 is greater than line 25, the exception was not met. Check 'No' here and check the applicable 'No' box in Part II, line 8a....										26		Yes X No		Yes X No		Yes X No		Yes X No	

### Exception A – Prior Year's Tax – Large Corporations

Use this exception only if prior year tax is less than current year tax.

27 Current year's tax.....										27					
										1st Installment		2nd Installment			
28 a Installment due. Enter line 23 x 30%.....										28a					
b Installment due. Enter line 27 x 70%.....										28b					
29 Amount paid by the installment due date (cumulative).....										29					
30 Compare the amount on line 28 with the amount on line 29. If line 28 is greater than line 29, the exception was not met. Check 'Yes' or 'No' and check applicable boxes on line 8b. To meet this exception you must check 'Yes' for both installments.....										30		Yes No		Yes No	

See instructions regarding amounts to use for installment 3 and installment 4.

### Exception B – Tax on Annualized Current Year Income

Enter number of months for each period. See instructions ►

										(a)		(b)		(c)		(d)			
31 Enter taxable income for each annualization period.....										31									
32 Annualization amounts. See instructions.....										32									
33 a Annualized taxable income. Multiply line 31 by line 32.....										33a									
b R&TC Section 23802(e) deduction (S corps only).....										33b									
c Net income. Subtract line 33b from line 33a.....										33c									
34 Tax. Multiply line 33c by the current tax rate.....										34									
35 Tax credits for each payment period.....										35									
36 Subtract line 35 from line 34.....										36									
37 Other taxes*.....										37									
38 Total tax. Add line 36 and line 37.....										38									
39 Applicable percentage. For short period returns (taxable year of less than 12 months), see the instructions for Part I, line 3.....										39		30% (not less than min)		70%		70%		100%	
40 Installment due. Multiply line 38 by line 39.....										40									
41 Amount paid by the installment due date (cumulative).....										41									
42 If line 41 is greater than line 40, the exception was met. Check 'Yes' here and check the applicable 'Yes' box in Part II, line 9. If line 40 is greater than line 41, the exception was not met. Check 'No' here and check the applicable 'No' box in Part II, line 9.....										42		Yes No		Yes No		Yes No		Yes No	

\*Include alternative minimum tax, S corporation taxes from Schedule D (100S) and from the excess net passive income tax, the QSub annual tax, installment amount credit recapture, and the minimum franchise tax.

**Part IV Exceptions Worksheets Continued**

<b>Exception C – Tax on Annualized Seasonal Income</b>		(a)	(b)	(c)	(d)				
		1st 3 months	1st 5 months	1st 8 months	1st 11 months				
<b>43</b> Enter taxable income for the following periods:									
a Taxable year beginning in 2011.....	<b>43a</b>								
b Taxable year beginning in 2012.....	<b>43b</b>								
c Taxable year beginning in 2013.....	<b>43c</b>								
<b>44</b> Enter taxable income for each period for the taxable year beginning in 2014....	<b>44</b>								
		1st 4 months	1st 6 months	1st 9 months	Entire year				
<b>45</b> Enter taxable income for the following periods:									
a Taxable year beginning in 2011.....	<b>45a</b>								
b Taxable year beginning in 2012.....	<b>45b</b>								
c Taxable year beginning in 2013.....	<b>45c</b>								
<b>46</b> Divide the amount in each column on line 43a by the amount in column (d) on line 45a.....	<b>46</b>								
<b>47</b> Divide the amount in each column on line 43b by the amount in column (d) on line 45b.....	<b>47</b>								
<b>48</b> Divide the amount in each column on line 43c by the amount in column (d) on line 45c.....	<b>48</b>								
<b>49</b> Add line 46 through line 48.....	<b>49</b>								
<b>50</b> Divide line 49 by 3.....	<b>50</b>								
		1st 4 months	1st 6 months	1st 9 months	Entire year				
<b>51 a</b> Divide line 44 by line 50.....	<b>51 a</b>								
b R&TC Section 23802(e) deduction. (S corp only)...	<b>51 b</b>								
c Net income. Subtract line 51b from line 51a.....	<b>51 c</b>								
<b>52</b> Tax. Multiply line 51c by the current tax rate.....	<b>52</b>								
<b>53</b> Divide the amounts in column (a) through column (c) on line 45a by the amount in column (d) on line 45a.....	<b>53</b>								
<b>54</b> Divide the amounts in column (a) through column (c) on line 45b by the amount in column (d) on line 45b.....	<b>54</b>								
<b>55</b> Divide the amounts in column (a) through column (c) on line 45c by the amount in column (d) on line 45c.....	<b>55</b>								
<b>56</b> Add line 53 through line 55.....	<b>56</b>								
<b>57</b> Divide line 56 by 3.....	<b>57</b>								
<b>58</b> Multiply the amounts in column (a) through column (c) of line 52 by the amounts in the corresponding column of line 57. In column (d), enter the amount from line 52, column (d).....	<b>58</b>								
<b>59</b> Tax credits for each payment period.....	<b>59</b>								
<b>60</b> Subtract line 59 from line 58.....	<b>60</b>								
<b>61</b> Other taxes*.....	<b>61</b>								
		(not less than min.)							
<b>62</b> Total tax. Add line 60 and line 61.....	<b>62</b>								
<b>63</b> Amount paid by the installment due date (cumulative).....	<b>63</b>								
<b>64</b> If line 63 is greater than line 62, the exception was met. Check 'Yes' here and check the applicable 'Yes' box in Part II, line 10. If line 62 is greater than line 63, the exception was not met. Check 'No' here and check the applicable 'No' box in Part II, line 10.....	<b>64</b>	Yes	No	Yes	No	Yes	No	Yes	No

\*Include alternative minimum tax, S corporation taxes from Schedule D (100S) and from the excess net passive income, QSub annual tax, installment amount credit recapture, and the minimum franchise tax.

2014

CALIFORNIA STATEMENTS

PAGE 1

CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

STATEMENT 1  
FORM 109, SCHEDULE D, LINE 3B  
OTHER DEDUCTIONS

COMMERCIAL RENTAL INCOME

INTEREST.....	\$	1,204.
TAXES.....		19,399.
TOTAL	\$	<u>20,603.</u>

IN

MAIL TO:  
Registry of Charitable Trusts  
P.O. Box 903447  
Sacramento, CA 94203-4470  
Telephone: (916) 445-2021

WEBSITE ADDRESS:  
<http://ag.ca.gov/charities/>

## ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

Sections 12586 and 12587, California Government Code  
11 Cal. Code Regs. sections 301-307, 311 and 312

Failure to submit this report annually no later than four months and fifteen days after the end of the organization's accounting period may result in the loss of tax exemption and the assessment of a minimum tax of \$800, plus interest, and/or fines or filing penalties as defined in Government Code Section 12586.1. IRS extensions will be honored.



State Charity Registration Number <u>006062</u> SAN DIEGO HISTORICAL SOCIETY DBA SAN DIEGO HISTORY CENTER <small>Name of Organization</small> 1649 EL PRADO #3 <small>Address (Number and Street)</small> SAN DIEGO, CA 92101 <small>City or Town</small> <span style="float: right;"><small>State</small> <small>ZIP Code</small></span>		Check if: <input type="checkbox"/> Change of address <input type="checkbox"/> Amended report Corporate or Organization No. <u>0131792</u> Federal Employer I.D. No. <u>95-1728991</u>	
<b>ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311 and 312)</b> Make Check Payable to Attorney General's Registry of Charitable Trusts			
<b>Gross Annual Revenue</b>	<b>Fee</b>	<b>Gross Annual Revenue</b>	<b>Fee</b>
Less than \$25,000	0	Between \$100,001 and \$250,000	\$50
Between \$25,000 and \$100,000	\$25	Between \$250,001 and \$1 million	\$75
		Between \$1,000,001 and \$10 million	\$150
		Between \$10,000,001 and \$50 million	\$225
		Greater than \$50 million	\$300
<b>PART A – ACTIVITIES</b>			
For your most recent full accounting period (beginning <u>7/01/14</u> ending <u>6/30/15</u> ) list: Gross annual revenue \$ <u>3,596,390.</u> Total assets \$ <u>5,430,168.</u>			
<b>PART B – STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT</b>			
Note: If you answer 'yes' to any of the questions below, you must attach a separate sheet providing an explanation and details for each 'yes' response. Please review RRF-1 instructions for information required.			
1 During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof either directly or with an entity in which any such officer, director or trustee had any financial interest?	Yes	No	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2 During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3 During this reporting period, did non-program expenditures exceed 50% of gross revenues?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
4 During this reporting period, were any organization funds used to pay any penalty, fine or judgment? If you filed a Form 4720 with the Internal Revenue Service, attach a copy.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
5 During this reporting period, were the services of a commercial fundraiser or fundraising counsel for charitable purposes used? If 'yes,' provide an attachment listing the name, address, and telephone number of the service provider.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
6 During this reporting period, did the organization receive any governmental funding? If so, provide an attachment listing the name of the agency, mailing address, contact person, and telephone number. <span style="float: right;">SEE STATEMENT 1</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7 During this reporting period, did the organization hold a raffle for charitable purposes? If 'yes,' provide an attachment indicating the number of raffles and the date(s) they occurred.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
8 Does the organization conduct a vehicle donation program? If 'yes,' provide an attachment indicating whether the program is operated by the charity or whether the organization contracts with a commercial fundraiser for charitable purposes.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
9 Did your organization have prepared an audited financial statement in accordance with generally accepted accounting principles for this reporting period?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Organization's area code and telephone number <u>(619) 232-6203</u>			
Organization's e-mail address <u>BLAWRENCE@SANDIEGOHISTORY.ORG</u>			
I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, it is true, correct and complete.			
THOMPSON FETTER	PRESIDENT		
<small>Signature of authorized officer</small>	<small>Printed Name</small>	<small>Title</small>	<small>Date</small>



2014

CALIFORNIA STATEMENTS

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CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

STATEMENT 1  
FORM RRF-1, PART B, LINE 6  
GOVERNMENT AGENCY THAT PROVIDED FUNDING

CITY OF SAN DIEGO  
COMMISSION FOR ARTS AND CULTURE  
1200 THIRD AVENUE, SUITE 924 MS 652  
SAN DIEGO, CA 92101-4106  
WHITNEY ROUX  
619-236-6798

COUNTY OF SAN DIEGO, CEP PROGRAM  
1600 PACIFIC HIGHWAY SUITE 166, SAN DIEGO, CA 92101  
TOOSHDI M. MCGOWAN  
619-531-4887

INSTITUTE OF MUSEUM AND LIBRARY SERVICES  
1800 M. STREET NW 9TH FLOOR, WASHINGTON, DC 20036  
STEVE SHWARTZMAN  
202-653-4641

2014

CALIFORNIA SUPPLEMENTAL INFORMATION

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CLIENT 10-110

SAN DIEGO HISTORICAL SOCIETY  
DBA SAN DIEGO HISTORY CENTER

95-1728991

1/26/16

09:18AM

FORM 199, PART II, LINE 11

COMPENSATION OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES

CHARLOTTE CAGAN	EXECUTIVE DIRECTOR	\$92,085
		-----
	TOTAL	\$92,085

