

Form **990-EZ**

Department of the Treasury
Internal Revenue Service

^{1,2,3}
Short Form
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$1,000,000 and total assets less than \$2,500,000 at the end of the year may use this form.

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-1150

2008

**Open to Public
Inspection**

A For the 2008 calendar year, or tax year beginning , 2008, and ending , 20

B Check if applicable

- Address change
- Name change
- Initial return
- Termination
- Amended return
- Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization

Connecticut Chapter of the United States Navy Veterans Assn

Number and street (or P O box, if mail is not delivered to street address) Room/suite

1718 M St NW **275**

City or town, state or country, and ZIP + 4

Washington DC 20036

D Employer identification number

56 2398171

E Telephone number

(860) 556-1100

F Group Exemption Number

4301

• **Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).**

G Accounting method: Cash Accrual
Other (specify) ▶

I Website: ▶ **www.NavyVets.org**

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

J Organization type (check only one) — 501(c) (19) ◀ (insert no) 4947(a)(1) or 527

K Check if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$1,000,000 or more, file Form 990 instead of Form 990-EZ ▶ \$ **197,205**

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

	1	Contributions, gifts, grants, and similar amounts received	1	197,205
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	
	4	Investment income	4	
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less: cost or other basis and sales expenses	5b	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)	5c	
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>		
	6a	Gross revenue (not including \$ 197,205 of contributions reported on line 1)	6a	-0-
	6b	Less: direct expenses other than fundraising expenses	6b	
	6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	-0-
	7a	Gross sales of inventory, less returns and allowances	7a	
	7b	Less: cost of goods sold	7b	
	7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
	8	Other revenue (describe ▶)	8	
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8.	9	197,205
Expenses	10	Grants and similar amounts paid (attach schedule)	10	133,287
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	
	13	Professional fees and other payments to independent contractors	13	22,232
	14	Occupancy, rent, utilities, and maintenance	14	5,357
	15	Printing, publications, postage, and shipping	15	34,050
	16	Other expenses (describe ▶ In house (volunteer) fundraising: telephone)	16	1,983
	17	Total expenses. Add lines 10 through 16	17	196,909
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	296
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	6,706
	20	Other changes in net assets or fund balances (attach explanation)	20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	7,002

Part II Balance Sheets. If Total assets on line 25, column (B) are \$2,500,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	799	22 634
23 Land and buildings		23
24 Other assets (describe ▶ Inventories for use or sale @ cost basis)	5,907	24 6,368
25 Total assets	6,706	25 7,002
26 Total liabilities (describe ▶)	-0-	26 -0-
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	6,706	27 7,002

SCANNED MAR 20 2009 Revenue

5 Expenses

Part III Statement of Program Service Accomplishments (See the instructions for Part III.)		Expenses
What is the organization's primary exempt purpose? See Attachment Part III		(Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts, optional for others)
Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each program title.		
28	See Attachment Part III	
	(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	28a
29		
	(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	29a
30		
	(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	30a
31	Other program services (attach schedule)	
	(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	31a
32	Total program service expenses (add lines 28a through 31a)	32 167,322

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV)				
(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-.)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
B.R. Taylor 335 Hamilton Ave., Norwich CT 06360	Commander -35-	-0-	-0-	-0-
James Butler 71 Truman St., Bridgeport CT 06606	Lt Commander -20-	-0-	-0-	-0-
Ed Disho 1175 Pinellas Point Dr, St Petersburg FL 33701	CFO -1-	-0-	-0-	-0-

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

		Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		✓
34	Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes		✓
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.		
a	Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?		✓
b	If "Yes," has it filed a tax return on Form 990-T for this year?		
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N		✓
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a -0-		
b	Did the organization file Form 1120-POL for this year?		✓
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?		✓
b	If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	
39	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on line 9	39a	
b	Gross receipts, included on line 9, for public use of club facilities	39b	
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶		
b	Section 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I	40b	
c	Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶		
d	Enter amount of tax on line 40c reimbursed by the organization ▶		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.	40e	✓
41	List the states with which a copy of this return is filed. ▶ CT		
42a	The books are in care of ▶ Ed Disho, HQSUSNVA Telephone no. ▶ (860) 586-1100 Located at ▶ 1718 M St NW #275, Washington DC ZIP + 4 ▶ 20036		
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country: ▶ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.	42b	✓
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.? If "Yes," enter the name of the foreign country: ▶	42c	✓
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43		☐
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	✓
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45	✓

Part VI Section 501(c)(3) organizations only. All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51.

- | | Yes | No |
|-----|-----|----|
| 46 | | |
| 47 | | |
| 48 | | |
| 49a | | |
| 49b | | |
- 46 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
- 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II
- 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E
- 49a Did the organization make any transfers to an exempt non-charitable related organization?
- b If "Yes," was the related organization(s) a section 527 organization?
- 50 Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
Total number of other employees paid over \$100,000 ▶				

51 Complete this table for the five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
Total number of other independent contractors each receiving over \$100,000 . . ▶		

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

Sign Here ▶ *B. R. Taylor* Signature of officer | 09.1.09 Date

▶ **B. R. Taylor, Director & Commander (CEO)** Type or print name and title

Paid Preparer's Use Only ▶ Preparer's signature | Date | Check if self-employed | Preparer's Identifying Number (See instructions)

Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ | EIN ▶ | Phone no ▶ ()

May the IRS discuss this return with the preparer shown above? See instructions ▶ Yes No

**Connecticut Chapter of the United States Navy Veterans Association
56-2398171
990 EZ, Part I, Line 10 Schedule
Statement of Functional Expenses**



• Specific Assistance to Individuals (No grants, as such, were made.)

All to indigents, indigent families, US Armed Forces Service Members or Service Member families, all within covered recipient classes (the "classes") of the IRS approved Form 1024 Application 990 Exempt Purposes of the Chapter.

Food...	\$31,789
Shelter...	20,455
Clothing...	16,541
In-kind Service Members' Care Packages...	17,691
In-kind miscellaneous supplies, e.g. portable TVs, radios, snacks, newspapers to hospitalized veterans and Service members...	7,955
American flags and grave markers provided to deceased veterans or their survivors...	521
Medical, dental & hospital fees and charges...	8,233
Direct cash assistance...	<u>30,102</u>
	\$133,287

**Connecticut Chapter of the United States Navy Veterans Association
56-2398171
990 EZ
Statement of Program Service Accomplishments
Attachment Part III**



The Chapter's primary exempt purpose, from the standpoint of both the qualitative and quantitative judgment of the Chapter, as stated in its current Mission Statement, is:

"The support, as the Association's primary and encompassing mission, of educational communication for policies and public support enhancing the cause of the United States of America, and of Liberty, in the world, the cause of naval power, a strong national defense vulnerable to none, the Navy mission as a keystone of that defense, and the remembrance of the service of the American Veteran."

The remaining discussion of Part III program service achievements is broken down into the six detailed, explicit and verbatim exempt purposes of the Association as stated in its IRS approved Form 1024 (a - f), with the five largest (as measured only by total dollar expenses incurred) described, and the remaining one, listed.

- a. To assist disabled and needy war veterans and members of the U.S. Armed Forces and their dependents and the widows, widowers and orphans of deceased veterans:
- b. To provide care and assistance to hospitalized veterans or members of the U.S. Armed Forces:

(Purposes a and b are combined because of the similarity of program services carried out applicable to these respective purposes.)

Food; shelter; clothing; in-kind Service Members' care packages; in-kind miscellaneous supplies, e.g. portable TVs, radios, snacks, newspapers; medical, dental and hospital services; and direct cash assistance (expense amounts for each category are broken out in the Form 990 EZ Part I, Line 10 Schedule) were provided to approximately 969 Connecticut resident recipients in the covered classes. Of these, approximately 54 were US Armed Forces Service Members receiving care packages.

Volunteer Chapter caseworkers counseled without charge or compensation approximately 850 Connecticut resident individuals in the covered classes either in applying for federal and state benefits or in finding "missing" active-duty or former members of the U.S. Armed Forces.

- c. To carry out programs to perpetuate the memory of deceased veterans and members of the U.S. Armed Forces and to comfort their survivors:

The Chapter published and distributed without charge a variety of printed material, including newsletters and flyers, dedicated to this Purpose. Approximately 25,000 Connecticut residents received or read such publications in the reported on CY. These print media also specifically

discussed the themes of (a) the plight of the needy American veteran and (b) the need for public support for our Armed Forces personnel fighting the War on Terror abroad.

The Chapter provided psychological comfort and counseling without charge or compensation to comfort the survivors of Connecticut veterans. Approximately 481 individuals received these services in the reported on CY. (Included on Line 82b.)

The Chapter placed approximately 100 small American flags or wreaths on the gravesites of Connecticut veterans in the reported on CY.

The Chapter was officially represented at government and community-sponsored Memorial Day, Independence Day and Veterans Day events in New York City, Washington, New Haven, Hartford and Boston in the reported on CY.

- d. To provide programs for educational activities:
- e. To sponsor or participate in activities of a patriotic nature:

(Purposes d and e are combined because of the similarity of program services carried out applicable to these respective Purposes. Program services discussed under Purpose c which are also applicable to Purposes d and e are not re-discussed here.)

The Chapter publicized, as a public service, the programs and activities of the Connecticut Department of Veterans Affairs on the Chapter's field of its Central Organization's website (www.NavyVets.org) and in separate print material.

The Chapter promoted specific legislative and executive government action in the reported on CY at both the federal and state capitol levels to:

1. Expand and enhance domestic security in the War on Terror;
2. Increase pay and benefits for active-duty members of the U.S. Armed Forces;
3. Enhance veterans' benefits;
4. Provide adequate support to enhance the security of U.S. Armed Forces personnel serving in the War on Terror abroad;
5. Increase and enhance Defense Spending for all branches of the U.S. Armed Forces;
6. Maintain specific domestic Armed Forces base operations where national security would be grievously harmed by the cessation of such operations, including the Groton submarine base; and,
most generally,
7. Aggressively promote the cause of the United States, and of the American value of Freedom, in the world.

- f. To provide social and recreational activities for Association members.

The Chapter did receive donated services and the use of materials, equipment and facilities at no charge, donated in all cases by Chapter Members, in the execution of all of the Chapter's fundraising, management and general and charitable program service activities, for which no tax deduction whatsoever was taken by any taxpayer. The value of these donations was: Priceless.



Connecticut Chapter of the United States Navy Veterans Association
EIN 56-2398171
CT Reg. #11-777
Form 990 EZ Footnotes

Footnote:

- 1. This Form 990EZ (core), as filed with the IRS, is an original and, as filed with the State of Connecticut, is an actual copy of the original as filed with the IRS. Form 990 EZ, Schedule A attached, however, is attached and filed only with the State of Connecticut pursuant to Connecticut Special Instructions dealing with the regulation of non-IRC § 501(c)(3) non-profit organizations which solicit charitable contributions in that state.**
- 2. Cents have been rounded upward or downward per the 990 Instructions.**
- 3. Blank spaces = -0- or None.**
- 4. HQS, US Navy Veterans Association is the U.S.C. Title 26 statutory supervisory authority for its Connecticut Chapter.**
- 5. Program service expenses are reflected, in whole or in part, as applicable, on the Form 990 EZ (core), Part I, Lines 10, 13, 15 and 17.**