

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

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1

Briefly describe the organization’s mission:

THE NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION (NSDAR) WAS ESTABLISHED TO PERPETUATE THE MEMORY AND SPIRIT OF THE MEN AND WOMEN WHO ACHIEVED AMERICAN INDEPENDENCE. THE SOCIETY ACHIEVES THIS OBJECTIVE THROUGH PROGRAMS WHICH ENCOURAGE HISTORICAL RESEARCH AND PUBLICATION, PRESERVATION OF HISTORICAL RELICS AND DOCUMENTS, EDUCATION AND PROMOTION OF PATRIOTIC ENDEAVORS.

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 \$ 6,473,636 including grants of \$ 12,737) (Revenue \$)

HISTORIC PRESERVATION: NSDAR MAINTAINS A MUSEUM FOR THE PURPOSE OF COLLECTING, EXHIBITING, AND PRESERVING OBJECTS RELATED TO THE AMERICAN REVOLUTION. THE MUSEUM IS OPEN TO MEMBERS AND THE GENERAL PUBLIC FREE OF CHARGE. NSDAR'S AMERICANA COLLECTION INCLUDES MANUSCRIPT AND IMPRINT MATERIALS PERTAINING TO LIFE IN COLONIAL AMERICA, THE REVOLUTIONARY WAR ERA, AND THE EARLY REPUBLIC. NSDAR ALSO MAINTAINS TWO NATIONAL HISTORIC LANDMARKS: MEMORIAL CONTINENTAL HALL WHICH HOUSES THE MUSEUM, PERIOD ROOMS AND THE LIBRARY; AND DAR CONSTITUTION HALL, WHICH HOSTS EVENTS AND ANNUAL MEETINGS FOR MEMBERS OF THE DAR.

4b

(Code:) (Expenses \$ 6,496,583 including grants of \$ 182,963) (Revenue \$ 615,126)

GENEALOGY AND RESEARCH: THE NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION (NSDAR) MAINTAINS RESEARCH AND AN EXTENSIVE GENEALOGICAL LIBRARY. THE LIBRARY CONTAINS APPROXIMATELY 225,000 VOLUMES, AS WELL AS MANY UNPUBLISHED GENEALOGY TYPESCRIPTS NOT AVAILABLE ELSEWHERE. THE LIBRARY IS OPEN TO MEMBERS AND NON-MEMBERS.

4c

(Code:) (Expenses \$ 5,288,233 including grants of \$ 2,451,868) (Revenue \$ 1,133,325)

A. NSDAR MAKES CONTRIBUTIONS TO DAR-APPROVED SCHOOLS, MANY OF WHICH ARE LOCATED IN APPALACHIA. THE DAR MARIAN ANDERSON LEGACY SCHOLARSHIP IS AWARDED TO A STUDENT PURSUING UNDERGRADUATE OR GRADUATE STUDY IN MUSIC.NSDAR ALSO AWARDS SCHOLORSHIPS IN: (1) POLITICAL SCIENCE, (2) HISTORY,(3) GOVERNMENT, (4) ECONOMICS, (5) BUSINESS LAW, (6) CHEMISTRY, (7) NURSING, AND (8) OCCUPATIONAL THERAPY. NSDAR ALSO PUBLISHES AMERICAN SPIRIT MAGAZINE, A BIMONTHLY MAGAZINEFOCUSING ON AMERICAN HISTORY, HISTORIC PRESERVATION, PATRIOTISM, AND EDUCATION.

(Code:) (Expenses \$ 2,453,672 including grants of \$ 1,878,546) (Revenue \$ 4,363,768)

BOARD PROJECTS: THIS PROGRAM INCLUDES ACTIVITIES TARGETED FOR ACTION BY THE PRESIDENT GENERAL. THE MOST RECENT PROJECT INVOLVES THE ONGOING PRESERVATION, RESTORATION AND IMPROVEMENT OF THE NSDAR COMPLEX OF HISTORIC BUILDINGS AND THE COLLECTIONS THEREIN, SUPPORTING CHAPTERS, ADVANCING DAR'S TECHNOLOGICAL CAPABILITIES IN SUPPORT OF ITS MISSION, FUNDING COMMUNITY GRANTS FOR HISTORIC PRESERVATION, EDUCATION, AND PATRIOTISM, AND IMPROVING NSDAR'S FINANCIAL STABILITY THROUGH PROMOTION OF ESTABLISHED PROGRAMS.

4d

Other program services (Describe in Schedule O.)

(Expenses \$ 2,453,672 including grants of \$ 1,878,546) (Revenue \$ 4,363,768)

4e

Total program service expenses 20,712,124

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	1 Yes	
2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions.	2 Yes	
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	3	No
4 Section 501(c)(3) organizations. 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	4	No
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 Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III	5	No
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	6	No
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	7	No
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8 Yes	
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	9	No
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	10 Yes	
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	11a Yes	
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	11b	No
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	11c	No
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	11d	No
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e Yes	
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)?	11f Yes	
12a If "Yes," complete Schedule D, Part XI. Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	12a Yes	
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	12b	No
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	No
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	No
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	14b	No
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	15	No
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	16	No
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.	17	No
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	18	No
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	19	No
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a	No
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b	
21 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? If "Yes," complete Schedule I, Parts I and II	21 Yes	

Part IV

Checklist of Required Schedules (continued)

		Yes	No	
22	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? If "Yes," complete Schedule I, Parts I and III	22	Yes	
23	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? If "Yes," complete Schedule J	23	Yes	
24a	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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		No
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? If "Yes," complete Schedule L, Part I	25b		No
26	Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons?	26		No
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	27		No
28	Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV	28a		No
b	A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	28b		No
c	A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions?	30	Yes	
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3?	33		No
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	34		No
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		No
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)? If "Yes," complete Schedule R, Part V, line 2	35b		
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	36		No
37	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? If "Yes," complete Schedule R, Part VI	37		No
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O.	38	Yes	

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	
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	139	
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0	
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c		

Part V	Statements Regarding Other IRS Filings and Tax Compliance (continued)					
2a 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		2a	196			
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?		2b		Yes		
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?		3a		Yes		
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O		3b		Yes		
4a 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)?		4a			No	
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)						
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . .		5a			No	
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		5b			No	
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		5c				
6a 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?		6a			No	
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		6b				
7 Organizations that may receive deductible contributions under section 170(c).						
a 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?		7a			No	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?		7b				
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		7c			No	
d If "Yes," indicate the number of Forms 8282 filed during the year		7d				
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		7e			No	
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		7f			No	
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		7g				
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		7h				
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		8				
9 Sponsoring organizations maintaining donor advised funds.						
a Did the sponsoring organization make any taxable distributions under section 4966?		9a				
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b				
10 Section 501(c)(7) organizations. Enter:						
a Initiation fees and capital contributions included on Part VIII, line 12		10a				
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		10b				
11 Section 501(c)(12) organizations. Enter:						
a Gross income from members or shareholders		11a				
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)		11b				
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		12a				
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year.		12b				
13 Section 501(c)(29) qualified nonprofit health insurance issuers.						
a Is the organization licensed to issue qualified health plans in more than one state?		13a				
Note. See the instructions for additional information the organization must report on Schedule O.						
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		13b				
c Enter the amount of reserves on hand		13c				
14a Did the organization receive any payments for indoor tanning services during the tax year?		14a			No	
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		14b				
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?		15			No	
16 Is the organization a trust that is not a private foundation and is required to file Form 990-E, U.S. Individual Income Tax Return, and is subject to the section 4968 excise tax on net investment income?		16			No	
b If "Yes," complete Form 4720, Schedule O.						
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?		17				
If "Yes," complete Form 6069.						

Part VI

Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 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

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Section A. Governing Body and Management

			Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year. 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.	1a	86	
b	Enter the number of voting members included in line 1a, above, who are independent	1b	84	
2	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?	2		No
3	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?	3		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		No
6	Did the organization have members or stockholders?	6	Yes	
7a	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?	7a	Yes	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	Yes	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	Yes	
b	Each committee with authority to act on behalf of the governing body?	8b	Yes	
9	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	9		No

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

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a	Yes	
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?	10b	Yes	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	Yes	
13	Did the organization have a written whistleblower policy?	13	Yes	
14	Did the organization have a written document retention and destruction policy?	14	Yes	
15	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?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
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?	16b		

Section C. Disclosure

17	List the states with which a copy of this Form 990 is required to be filed	AL, AR, CA, FL, GA, HI, IL, KS, KY, MA, MD, MI, MN, MS, NC, ND, NH, NJ, NM, NY, OR, PA, RI, SC, TN, UT, WI, WV
18	Section 6104 requires an organization to make its Form 1023 (1024 or 1024-A, 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.	
20	State the name, address, and telephone number of the person who possesses the organization's books and records:	PETER SAVARINO 1776 D STREET NW WASHINGTON, DC 20006 (240) 599-1262

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

- 1a 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 the 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, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

List all of the organization’s **former** officers, key employees, or 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.
- See the instructions for the order in which to list the persons above.

☐ 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/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(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) PAMELA WRIGHT PRESIDENT GENERAL	40.00	X		X				60,000	0	0
(2) VIRGINIA SEBASTIAN STORAGE FIRST VICE PRESIDENT GENERAL	20.00	X		X				0	0	0
(3) VIRGINIA LINGELBACH CHAPLAIN GENERAL	20.00	X		X				0	0	0
(4) LANABETH HORGEN RECORDING SECRETARY GENERAL	20.00	X		X				0	0	0
(5) JANET MCFARLAND CORRESPONDING SECRETARY GENERAL	20.00	X		X				0	0	0
(6) NANCY WRIGHT ORGANIZING SECRETARY GENERAL	20.00	X		X				0	0	0
(7) CHERYL EDWARDS TREASURER GENERAL	20.00	X		X				0	0	0
(8) CYNTHIA PARNELL REGISTRAR GENERAL	20.00	X		X				0	0	0
(9) SUZANNE HESKE HISTORIAN GENERAL	20.00	X		X				0	0	0
(10) CYNTHIA MCNAMARA LIBRARIAN GENERAL	20.00	X		X				0	0	0
(11) SUSAN METZGER CURATOR GENERAL	20.00	X		X				0	0	0
(12) JUNELE MONGNO REPORTER GENERAL	20.00	X		X				0	0	0
(13) BEVERLY PRZYBYLSKI NATIONAL PARLIAMENTARIAN	20.00	X		X				24,000	0	0
(14) KATHRYN ASAY VICE PRESIDENT GENERAL	4.00	X						0	0	0
(15) ELIZABETH BILLHAM VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X						0	0	0
(16) PATRICE BIRNER VICE PRESIDENT GENERAL	4.00	X						0	0	0
(17) SUSAN BRODERICK VICE PRESIDENT GENERAL	4.00	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/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee			
(18) CANDANCE CAIN VICE PRESIDENT GENERAL	4.00	X					0	0	
(19) ANNA CHOI ST REGENT - NC (THRU 06/24), VP GENERAL	4.00	X					0	0	
(20) ELIZABETH-HAWLEY CLARK-URBAN VICE PRESIDENT GENERAL	4.00	X					0	0	
(21) TAMMY CLEMONS VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X					0	0	
(22) PATRICE DONNELLY ST REGENT - AL (THRU 06/24), VP GENERAL	4.00	X					0	0	
(23) DEBORAH DUAY VICE PRESIDENT GENERAL	4.00	X					0	0	
(24) MORGAN ELLIOTT VICE PRESIDENT GENERAL	4.00	X					0	0	
(25) BETTY HARRAH ST REGENT - GA (THRU 06/24), VP GENERAL	4.00	X					0	0	
(26) ELIZABETH HICKS ST REGENT - DC (THRU 06/24), VP GENERAL	4.00	X					0	0	
(27) KATHLEEN HUSTON VICE PRESIDENT GENERAL	4.00	X					0	0	
(28) AMANDA LAZARUS VICE PRESIDENT OF GENERAL	4.00	X					0	0	
(29) LAEL MARLOW VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X					0	0	
(30) BONNIBEL MOFFAT ST REGENT - SC (THRU 06/24), VP GENERAL	4.00	X					0	0	
(31) HELLEN POLK VICE PRESIDENT GENERAL	4.00	X					0	0	
(32) PAULA RENKAS VICE PRESIDENT GENERAL	4.00	X					0	0	
(33) SUSAN TILLMAN VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X					0	0	
(34) MAUREEN TIPTON VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X					0	0	
(35) LEANN FETHEROLF TURBYFILL VICE PRESIDENT GENERAL	4.00	X					0	0	
(36) KELLY VANWORMER ST REGENT - MI (THRU 06/24), VP GENERAL	4.00	X					0	0	
(37) ELIZABETH WATKINS VICE PRESIDENT GENERAL	4.00	X					0	0	
(38) CAROLE WEISS VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X					0	0	
(39) CHARLOTTE WHITE VICE PRESIDENT GENERAL	4.00	X					0	0	
(40) ROBERTA CECILE WIMBERLEY VICE PRESIDENT GENERAL	4.00	X					0	0	
(41) KAY YARBROUGH VICE PRESIDENT GENERAL (THRU 06/24)	4.00	X					0	0	
(42) SARAH HEIB STATE REGENT - AK	4.00	X					0	0	
(43) MALINDA WILLIAMS STATE REGENT - AL	4.00	X					0	0	
(44) GALE MARKLEY STATE REGENT - AR	4.00	X					0	0	
(45) SARAH ZIKER STATE REGENT - AZ	4.00	X					0	0	
(46) SALLIE LOVORN STATE REGENT - AZ (THRU 06/24)	4.00	X					0	0	
(47) CHRISTINA RAMOS STATE REGENT - CA	4.00	X					0	0	
(48) SHARON LEE MAAS STATE REGENT - CA (THRU 06/24)	4.00	X					0	0	
(49) LESLIE BRINKLEY STATE REGENT - CO	4.00	X					0	0	
(50) LISA MELLAND STATE REGENT - CT	4.00	X					0	0	
(51) YVONNE LISER STATE REGENT - DC	4.00	X					0	0	
(52) BARBARA SENINGEN STATE REGENT - DE	4.00	X					0	0	
(53) CYNTHIA ADDISON STATE REGENT - FL	4.00	X					0	0	
(54) HELEN POWELL STATE REGENT - GA	4.00	X					0	0	
(55) JULENE IGNACIO STATE REGENT - HI	4.00	X					0	0	
(56) SARAH STEINKE STATE REGENT - IA	4.00	X					0	0	
(57) EDITH BRUNIA STATE REGENT - IA (THRU 06/24)	4.00	X					0	0	
(58) JANICE BELLER STATE REGENT - ID	4.00	X					0	0	
(59) CHRISTINA BANNON STATE REGENT - IL	4.00	X					0	0	
(60) ELAINE SHOLTY STATE REGENT - IN	4.00	X					0	0	
(61) CHERYL BAXTER STATE REGENT - IN (THRU 06/24)	4.00	X					0	0	
(62) REBECCA KLINE STATE REGENT - KS	4.00	X					0	0	
(63) LINDA CONRAD STATE REGENT - KY	4.00	X					0	0	
(64) CHERYL GOTT STATE REGENT - LA	4.00	X					0	0	
(65) BEATRICE NUTT STATE REGENT - MA	4.00	X					0	0	
(66) ELIZABETH CRANE STATE REGENT - MD	4.00	X					0	0	
(67) MERNIE CRANE STATE REGENT - MD (THRU 06/24)	4.00	X					0	0	
(68) ELIZABETH CALHOUN STATE REGENT - ME	4.00	X					0	0	
(69) DAWN BRADY STATE REGENT - MI	4.00	X					0	0	
(70) CAROLYN LOEFFLER STATE REGENT - MN	4.00	X					0	0	
(71) LISA PARKS STATE REGENT - MO	4.00	X					0	0	
(72) RENEE POPE PACE STATE REGENT - MO (THRU 06/24)	4.00	X					0	0	
(73) CYNTHIA MAGNUM STATE REGENT - MS	4.00	X					0	0	
(74) JENNIFER BUCKLEY STATE REGENT - MT	4.00	X					0	0	
(75) CRICKET CRIGLER STATE REGENT - NC	4.00	X					0	0	
(76) ANNE SCHURIG MUIR STATE REGENT - ND	4.00	X					0	0	
(77) ANN COX STATE REGENT - NE	4.00	X					0	0	
(78) MARCIA SHAVLIK STATE REGENT - NE (THRU 06/24)	4.00	X					0	0	
(79) KATHLEEN ADAIR STERNENBERG STATE REGENT - NH	4.00	X					0	0	
(80) DIANA WAUGH OLIVER STATE REGENT - NJ	4.00	X					0	0	
(81) ELEANOR ORTIZ STATE REGENT - NM	4.00	X					0	0	
(82) MONA A CRANDELL HOOK STATE REGENT - NV	4.00	X					0	0	
(83) CYNTHIA BELL STATE REGENT - NV (THRU 06/24)	4.00	X					0	0	
(84) PAMELA BARRACK STATE REGENT - NY	4.00	X					0	0	
(85) SUSAN LEININGER STATE REGENT - OH	4.00	X					0	0	
(86) GRACE ELLSWORTH STATE REGENT - OK	4.00	X					0	0	
(87) NANCY LISLE STATE REGENT - OK (THRU 06/24)	4.00	X					0	0	
(88) MARTHA BURRELL STATE REGENT - OR	4.00	X					0	0	
(89) NANCY SLAGLE STATE REGENT - OR (THRU 06/24)	4.00	X					0	0	
(90) MARGUERITE FRITSCH STATE REGENT - PA	4.00	X					0	0	
(91) ANNE HARRIGAN STATE REGENT - RI	4.00	X					0	0	
(92) ALICE CASKEY STATE REGENT - SC	4.00	X					0	0	
(93) KATHERINE TARRELL STATE REGENT - SD	4.00	X					0	0	
(94) EMILY ROBINSON STATE REGENT - TN	4.00	X					0	0	
(95) SUSAN JOHNSTON STATE REGENT - TX	4.00	X					0	0	
(96) MARCY CARTER-LOVICK STATE REGENT - TX (THRU 06/24)	4.00	X					0	0	
(97) HOLLIE GILLILAND STATE REGENT - UT	4.00	X					0	0	
(98) KATHRYN MADSEN STATE REGENT - UT (THRU 06/24)	4.00	X					0	0	
(99) LAURIE NESBITT STATE REGENT - VA	4.00	X					0	0	
(100) JANET WEAVER STATE REGENT - VT	4.00	X					0	0	
(101) JACQUELINE RIDDELL STATE REGENT - WA	4.00	X					0	0	
(102) CHRISTINE CROWDER STATE REGENT - WA (THRU 06/24)	4.00	X					0	0	
(103) SANDRA JEANNE SNOW STATE REGENT - WI	4.00	X					0	0	
(104) JANE LARKE STATE REGENT - WV	4.00	X					0	0	
(105) LINDSEY TAYLOR GROVES STATE REGENT - WY	4.00	X					0	0	
(106) CLAIRE WHITE STATE REGENT - WY (THRU 06/24)	4.00	X					0	0	
(107) MAIRE-LAURENCE DE ROCHEFORT-SIRIEYX STATE REGENT - FRANCE (THRU 06/24)	4.00	X					0	0	
(108) LESLEY BENN GENERAL COUNSEL	40.00			X			255,431	0	48,532
(109) TORGRIM FORBERG EXECUTIVE DIRECTOR	40.00			X			193,462	0	73,515
(110) PATRICIA BREICHNER DIRECTOR OF HUMAN RESOURCES	40.00				X		154,960	0	58,885
(111) SANDRA POLLACK DEVELOPMENT DIRECTOR	40.00				X		152,741	0	58,042
(112) VICTOR KUNZ DIRECTOR OF INFORMATION SYSTEMS	40.00				X		152,258	0	57,859
(113) HEIDI CAMPBELL-SHOAF MUSEUM DIRECTOR AND CHIEF CURATOR	40.00				X		118,139	0	44,893
(114) CATHERINE LONDON DIRECTOR OF PUBLIC RELATIONS	40.00				X		114,096	0	43,357
1b Sub-Total									
c Total from continuation sheets to Part VII, Section A									
d Total (add lines 1b and 1c)							1,225,087	0	385,083
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 18									

		Yes	No
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		No
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? <i>If "Yes," complete Schedule J for such individual</i>	Yes	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		No

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
WORCESTER EISENBRANDT INC 2100 GABLE AVENUE BALTIMORE, MD 21230 AMERICA GHD INC PO BOX 735 SWANSEA, MA 02777 C-CON INC	BUILDING IMPROVEMENTS	3,346,730
7679 LIMESTONE DRIVE UNIT 135 GAINESVILLE, VA 20155 HAMMOCK INC	PINS/JEWELERY SUPPLIER	2,033,668
PO BOX 331518 NASHVILLE, TN 37203 THE CALMARK GROUP	BUILDING IMPROVEMENT	1,328,561
6755 S SAYRE AVE BEDFORD PARK, IL 60638	PUBLISHING	1,118,431
	MAILING SERVICES	1,062,097

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 **33**

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
Contributions, Gifts, Grants, and Other	1a Federated campaigns		1a	
Amt Similar Amounts	b Membership dues		1b 8,589,193	
	c Fundraising events		1c	
	d Related organizations		1d	
	e Government grants (contributions)		1e	
	f All other contributions, gifts, grants, and similar amounts not included above		1f 8,573,711	
	g Noncash contributions included in lines 1a - 1f:\$		1g 25,862	
		h Total. Add lines 1a-1f		17,162,904

Program Service Revenue	2a APPLICATION FEES	Business Code				
		900099	1,214,176	1,214,176		
	b MAGAZINE REVENUE	541800	1,149,039	1,133,325	15,714	
	c MEMBER MEETING FEES	900099	392,697	392,697		
	d RECORD COPY FEES	900099	222,429	222,429		
	e LIBRARY RESEARCH FEES	900099	1,375	1,375		
	f All other program service revenue.					
	9 Total. Add lines 2a-2f.	2,979,716				

Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		5,129,434			5,129,434	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties		4,734			4,734	
	6a Gross rents	(i) Real	(ii) Personal				
		6a 1,499,821					
		b Less: rental expenses	6b 58,942				
	c Rental income or (loss)	6c 1,440,879					
	d Net rental income or (loss)		1,440,879			1,440,879	
	7a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		7a 17,685,429					
		b Less: cost or other basis and sales expenses	7b 14,658,139				
	c Gain or (loss)	7c 3,027,290					
	d Net gain or (loss)		3,027,290			3,027,290	
	8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	8a					
		b Less: direct expenses	8b				
	c Net income or (loss) from fundraising events						
	9a Gross income from gaming activities. See Part IV, line 19	9a					
b Less: direct expenses		9b					
c Net income or (loss) from gaming activities							
10a Gross sales of inventory, less returns and allowances	10a	5,779,151					
	b Less: cost of goods sold	10b 2,510,677					
c Net income or (loss) from sales of inventory		3,268,474	3,148,217	120,257			

OtherRevenueMiscAmt	11a OTHER INCOME	Business Code				
		900099	879,394			879,394
	b					
	c					
	d All other revenue					
	e Total. Add lines 11a-11d	879,394				
12 Total revenue. See instructions		33,892,825	6,112,219	135,971	10,481,731	

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	4,127,516	4,127,516		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	398,598	398,598		
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	630,939	375,106	194,533	61,300
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	9,865,604	5,865,299	3,041,793	958,512
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	213,999	127,227	65,981	20,791
9 Other employee benefits	875,119	520,276	269,819	85,024
10 Payroll taxes	811,899	482,690	250,327	78,882
11 Fees for services (non-employees):				
a Management				
b Legal	220,186		220,186	
c Accounting	83,744		83,744	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	199,816		199,816	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	1,820,462	1,411,278	186,533	222,651
12 Advertising and promotion				
13 Office expenses	4,681,757	2,845,574	611,871	1,224,312
14 Information technology	1,501,355	754,603	641,096	105,656
15 Royalties				
16 Occupancy	595,967	457,299	131,996	6,672
17 Travel	266,092	118,383	129,267	18,442
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	1,276,952	267,701	757,416	251,835
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	2,279,053	1,785,941	422,710	70,402
23 Insurance	592,268	148,067	444,201	
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 OTHER EXPENSES	1,318,305	413,339	757,456	147,510
b COLLECTIONS ADDITIONS	449,864	449,864		
c TAXES AND LICENSES	147,276	163,363	-16,111	24
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	32,356,771	20,712,124	8,392,634	3,252,013
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 ☐ 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 IX

☐

				(A)		(B)	
				Beginning of year		End of year	
Assets	1	Cash—non-interest-bearing		8,320,776	1	8,385,755	
	2	Savings and temporary cash investments		7,298,896	2	470,184	
	3	Pledges and grants receivable, net			3		
	4	Accounts receivable, net		212,326	4	266,902	
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			5		
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)			6		
	7	Notes and loans receivable, net			7		
	8	Inventories for sale or use		3,765,900	8	4,411,156	
	9	Prepaid expenses and deferred charges		301,299	9	619,826	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	75,554,182			
	b	Less: accumulated depreciation	10b	35,940,599	35,135,720	10c	39,613,583
	11	Investments—publicly traded securities		173,129,219	11	191,775,520	
	12	Investments—other securities. See Part IV, line 11		992,261	12	1,079,300	
	13	Investments—program-related. See Part IV, line 11			13		
	14	Intangible assets			14		
	15	Other assets. See Part IV, line 11			15		
16	Total assets. Add lines 1 through 15 (must equal line 33)		229,156,397	16	246,622,226		
Liabilities	17	Accounts payable and accrued expenses		3,362,966	17	3,354,959	
	18	Grants payable			18		
	19	Deferred revenue		2,734,321	19	2,392,972	
	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 any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			22		
	23	Secured mortgages and notes payable to unrelated third parties			23		
	24	Unsecured notes and loans payable to unrelated third parties			24		
	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		509,046	25	1,017,332	
	26	Total liabilities. Add lines 17 through 25		6,606,333	26	6,765,263	
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here ☒ and complete lines 27, 28, 32, and 33.						
	27	Net assets without donor restrictions		88,519,214	27	87,832,707	
	28	Net assets with donor restrictions		134,030,850	28	152,024,256	
	Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.						
	29	Capital stock or trust principal, or current funds			29		
	30	Paid-in or capital surplus, or land, building or equipment fund			30		
	31	Retained earnings, endowment, accumulated income, or other funds			31		
	32	Total net assets or fund balances		222,550,064	32	239,856,963	
	33	Total liabilities and net assets/fund balances		229,156,397	33	246,622,226	

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	33,892,825
2	Total expenses (must equal Part IX, column (A), line 25)	2	32,356,771
3	Revenue less expenses. Subtract line 2 from line 1	3	1,536,054
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	222,550,064
5	Net unrealized gains (losses) on investments	5	15,614,012
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	156,833
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (A))	10	239,856,963

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: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? 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: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		No
b Were the organization's financial statements audited by an independent accountant? 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: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis	Yes	
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? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	Yes	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		No
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.		

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

Name of the organization
NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION

Employer identification number
53-0205923

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 12, 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 (Form 990).)
- 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 agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:
- 10

☒

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.)
- 11

☐

An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12

☐

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 on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- 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 it 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- 10 above (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		
Total						

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 failed to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . .						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge..						
4 Total. Add lines 1 through 3						
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) . .						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
7 Amounts from line 4. .						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on . .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). .						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. 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 stop here ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2024 (line 6, column (f) divided by line 11, column (f))	14	
15 Public support percentage for 2023 Schedule A, Part II, line 14	15	
16a 33 1/3% support test—2024. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
b 33 1/3% support test—2023. 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 stop here. The organization qualifies as a publicly supported organization ☐		
17a 10%-facts-and-circumstances test—2024. 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 stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐		
b 10%-facts-and-circumstances test—2023. 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 stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐		

Part IIISupport Schedule for Organizations Described in Section 509(a)(2)
(Complete only if you checked the box on line 10 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 year beginning in) ▶	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .	15,979,125	15,811,455	17,685,007	18,728,185	17,162,904	85,366,676
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	5,586,085	7,348,905	9,819,628	9,958,666	8,638,610	41,351,894
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 Total. Add lines 1 through 5	21,565,210	23,160,360	27,504,635	28,686,851	25,801,514	126,718,570
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	237,390	560,120	449,094	136,285	482,475	1,865,364
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.						0
c Add lines 7a and 7b. .	237,390	560,120	449,094	136,285	482,475	1,865,364
8 Public support. (Subtract line 7c from line 6.)						124,853,206

Section B. Total Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
9 Amounts from line 6. . .	21,565,210	23,160,360	27,504,635	28,686,851	25,801,514	126,718,570
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . .	3,589,199	3,738,442	4,752,251	5,633,912	6,633,989	24,347,793
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.	3,589,199	3,738,442	4,752,251	5,633,912	6,633,989	24,347,793
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.			41,963	66,128	25,744	133,835
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . .	579,081	560,447			879,394	2,018,922
13 Total support. (Add lines 9, 10c, 11, and 12.) .	25,733,490	27,459,249	32,298,849	34,386,891	33,340,641	153,219,120
14 First 5 years. 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 stop here.	☐					

Section C. Computation of Public Support Percentage		
15 Public support percentage for 2024 (line 8, column (f) divided by line 13, column (f))	15	81.490 %
16 Public support percentage from 2023 Schedule A, Part III, line 15	16	81.710 %

Section D. Computation of Investment Income Percentage		
17 Investment income percentage for 2024 (line 10c, column (f) divided by line 13, column (f))	17	15.890 %
18 Investment income percentage from 2023 Schedule A, Part III, line 17	18	15.760 %
19a 33 1⁄3% support tests–2024. 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–2023. 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 12 of Part I. If you checked box 12a, of Part I, complete Sections A and B. If you checked box 12b, of Part I, complete Sections A and C. If you checked box 12c, of Part I, complete Sections A, D, and E. If you checked box 12d, of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c 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)? <i>If "Yes," explain in Part VI 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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, 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).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990) .</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a 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))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).</i>		

Part IV Supporting Organizations (continued)

		Yes	No
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 on lines 11b and 11c below, the governing body of a supported organization?		
b	A family member of a person described on 11a above?		
c	A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to 11a, 11b, or 11c, provide detail in Part VI.</i>		

Section B. Type I Supporting Organizations

		Yes	No
1	Did the officers, 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? <i>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.</i>		
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? <i>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.</i>		

Section C. Type II Supporting Organizations

		Yes	No
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)? <i>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).</i>		

Section D. All Type III Supporting Organizations

		Yes	No
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, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
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? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3	By reason of the relationship described in line 2 above, 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? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

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 lines 2a and 2b 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? <i>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.</i>			
b	Did the activities described on line 2a, above constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>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.</i>			
3	Parent of Supported Organizations. Answer lines 3a and 3b 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? <i>If "Yes" or "No", provide details in Part VI.</i>			
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI. the role played by the organization in this regard.</i>			

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 Nov. 20, 1970 (*explain in **Part VI***). 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	Adjusted Net Income (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):	1	
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	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
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 0.015 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 0.035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (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	Distributable Amount. 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)

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	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions	8
9	Distributable amount for 2024 from Section C, line 6	9
10	Line 8 amount divided by Line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2024	(iii) Distributable Amount for 2024
1	Distributable amount for 2024 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2024 (reasonable cause required-- explain in Part VI). See instructions.		
3	Excess distributions carryover, if any, to 2024:		
a	From 2019.		
b	From 2020.		
c	From 2021.		
d	From 2022.		
e	From 2023.		
f	Total of lines 3a through e		
g	Applied to underdistributions of prior years		
h	Applied to 2024 distributable amount		
i	Carryover from 2019 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2024 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2024 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, explain in Part VI . See instructions.		
6	Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, explain in Part VI. See instructions.		
7	Excess distributions carryover to 2025. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2020.		
b	Excess from 2021.		
c	Excess from 2022.		
d	Excess from 2023.		
e	Excess from 2024.		

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test	
Return Reference	Explanation
SCHEDULE A, PART III, LINE 12, EXPLANATION OF OTHER INCOME:	OTHER INCOME - 2020 AMOUNT: \$ 579,081. 2021 AMOUNT: \$ 560,447. 2024 AMOUNT: \$ 879,394.
PART III, SECTION B, LINE 12:	THE OTHER INCOME REPRESENTS MANAGEMENT FEES AND MISCELLANEOUS INCOME.

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Schedule B (Form 990) (Rev. January 2025) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
Name of the organization NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION		Employer identification number 53-0205923

Organization type (check one):

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

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't 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 isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Employer identification number
53-0205923

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
RESTRICTED		\$ RESTRICTED	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	☐ Person
			☐ Payroll
			☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
NATIONAL SOCIETY DAUGHTERS OF THE
AMERICAN REVOLUTION

Employer identification number
53-0205923

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
-		\$	
(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
-		\$	

Name of organization NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION	Employer identification number 53-0205923
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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.) \$

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
	(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	

Additional Data

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Software ID:

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

Complete if the organization answered "Yes" on 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" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).	
☐ Preservation of land for public use (e.g., recreation or education)	☐ Preservation of an historically important land area
☐ Protection of natural habitat	☐ Preservation of a certified historic structure
☐ 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.	
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d
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 ▶	
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, handling of violations, and enforcing conservation easements during the year ▶	
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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.	

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

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB 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.	
b If the organization elected, as permitted under FASB 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 on 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 FASB ASC 958 relating to these items:	
a Revenue included on 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

b ☒ Scholarly research

c ☒ Preservation for future generations

d ☒ Loan or exchange programs

e ☐ Other
- 4 Provide a description of the organization’s collections and explain how they further the organization’s exempt purpose in 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" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a 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	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f
- 2a 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" on Form 990, Part IV, line 10.

- | | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance | 84,492,218 | 72,515,609 | 87,140,869 | 74,747,865 | 65,958,564 |
| b Contributions | 721,191 | 692,015 | 558,986 | 648,573 | 458,557 |
| c Net investment earnings, gains, and losses | 11,173,193 | 11,849,546 | -14,657,365 | 12,093,937 | 8,954,339 |
| d Grants or scholarships | 1,072,980 | 564,952 | 526,881 | 349,506 | 623,595 |
| e Other expenditures for facilities and programs | | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | 95,313,622 | 84,492,218 | 72,515,609 | 87,140,869 | 74,747,865 |
- 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 ▶ 32.254 %

c Term endowment ▶ 67.746 %

The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations

(ii) Related organizations

b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?
- | | Yes | No |
|--------|-----|----|
| 3a(i) | | No |
| 3a(ii) | | No |
| 3b | | |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on 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
1a Land		207,420		207,420
b Buildings		46,083,676	16,712,585	29,371,091
c Leasehold improvements		18,995,978	10,506,203	8,489,775
d Equipment		5,426,015	4,798,164	627,851
e Other		4,841,093	3,923,647	917,446
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				39,613,583

Part VII

Investments - Other Securities.
Complete if the organization answered "Yes" on 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)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.)		

Part VIII

Investments - Program Related.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

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

Part IX

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

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 15.)	

Part X

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
CHARITABLE GIFT ANNUITY	875,843
OTHER CURRENT LIABILITIES	141,489
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.)	1,017,332
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 ☒	

Schedule D (Form 990) (Rev. 1-2025)

Part XI

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

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

1	Total revenue, gains, and other support per audited financial statements		1	49,522,796
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	15,614,012	
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	156,833	
e	Add lines 2a through 2d		2e	15,770,845
3	Subtract line 2e from line 1		3	33,751,951
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	199,816	
b	Other (Describe in Part XIII.)	4b	-58,942	
c	Add lines 4a and 4b		4c	140,874
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	33,892,825

Part XII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

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

1	Total expenses and losses per audited financial statements		1	32,215,897
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.)	2d	58,942	
e	Add lines 2a through 2d		2e	58,942
3	Subtract line 2e from line 1		3	32,156,955
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	199,816	
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b		4c	199,816
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	32,356,771

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.

Return Reference	Explanation
PART III, LINE 1A:	THE NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION (NSDAR) ACQUIRES ITS COLLECTIONS, WHICH INCLUDE LIBRARY BOOKS AND HISTORICAL TREASURES OF ITS MUSEUM AND AMERICANA COLLECTION, THROUGH PURCHASE OR DONATION. NSDAR'S COLLECTIONS ARE HELD FOR PUBLIC EXHIBITION, EDUCATION OR RESEARCH AND ARE PROTECTED AND PRESERVED.
PART III, LINE 4:	NSDAR'S COLLECTIONS INCLUDE LIBRARY BOOKS AND HISTORICAL TREASURES OF ITS MUSEUM, LIBRARY AND AMERICANA COLLECTION. THE COLLECTIONS ARE HELD FOR PUBLIC EXHIBITION, EDUCATION, AND RESEARCH AND ARE PROTECTED AND PRESERVED.
PART V, LINE 4:	NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION ENDOWMENT CONSISTS OF MULTIPLE FUNDS ESTABLISHED FOR A VARIETY OF PURPOSES TO PROVIDE FOR THE LONG TERM SUPPORT OF THE ORGANIZATION AND ITS PROGRAMS, INCLUDING GRANTS AND SCHOLARSHIPS.
PART X, LINE 2:	THE NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION (NSDAR) IS EXEMPT FROM FEDERAL INCOME TAXES UNDER THE PROVISIONS OF SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE. IT IS SUBJECT TO TAX ONLY ON ITS NET UNRELATED BUSINESS INCOME. ADDITIONALLY, NSDAR IS EXEMPT FROM INCOME TAXES IN THE DISTRICT OF COLUMBIA. IT HAS BEEN DETERMINED THAT NSDAR IS NOT A PRIVATE FOUNDATION AS DEFINED IN SECTION 509(A) OF THE CODE. NSDAR FOLLOWS THE INCOME TAX STANDARD FOR UNCERTAIN INCOME TAX POSITIONS. NSDAR EVALUATED ITS TAX POSITIONS AND DETERMINED THAT ITS TAX POSITIONS ARE MORE-LIKELY-THAN-NOT TO BE SUSTAINED ON EXAMINATION. NSDAR'S INCOME TAX RETURNS ARE SUBJECT TO REVIEW AND EXAMINATION BY FEDERAL AND STATE AUTHORITIES.
PART XI, LINE 2D - OTHER ADJUSTMENTS:	NET CHANGE IN VALUE OF SPLIT INTEREST 156,833.
PART XI, LINE 4B - OTHER ADJUSTMENTS:	RENTAL EXPENSES NETTED IN REVENUE -58,942.
PART XII, LINE 2D - OTHER ADJUSTMENTS:	RENTAL EXPENSES NETTED IN REVENUE 58,942.

Additional Data

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Software ID:

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Schedule I (Form 990) (Rev. January 2025) Department of the Treasury Internal Revenue Service	Grants and Other Assistance to Organizations, Governments and Individuals in the United States Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22. ▶ Attach to Form 990. ▶ Go to www.irs.gov/Form990 for instructions and the latest information.	OMB No. 1545-0047 Open to Public Inspection
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Name of the organization NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION	Employer identification number 53-0205923
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Part I General Information on Grants and Assistance

- 1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No
- 2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) KATE DUNCAN SMITH SCHOOL 6077 MAIN STREET GRANT,AL 35747	63-0338084	501(C)(3)	736,196	0	N/A	N/A	TO FUND MAINTENANCE, REPAIRS, UTILITIES AND LABOR EXPENSES UNDER THE ELLA ATWELL FUND CENTENNIAL CAMPUS COMMONS PROJECT
(2) CROSSNORE SCHOOL P O BOX 249 CROSSNORE,NC 286160249	35-2454917	501(C)(3)	660,980	0	N/A	N/A	TO FUND UTILITIES, REPAIRS, LABOR AND MAINTENANCE EXPENSES
(3) WOMEN'S SUFFRAGE NATIONAL MONUMENT FOUNDATION C/O ANNA LAYMON 510 BAY BLUFF WEST DAPHNE,AL 35626	83-2689131	501(C)(3)	350,000	0	N/A	N/A	DONATION TO BECOME A FOUNDING CIRCLE DONOR AT THE VICTORY GIVING CIRCLE LEVEL
(4) NATIONAL GENEALOGICAL SOCIETY 4527 17TH ST NORTH ARLINGTON,V A 222072399	52-0745713	501(C)(3)	250,000	0	N/A	N/A	TO HELP DIGITIZE NACA BOUNTY-LAND WARRANT APPLICATION FILES
(5) MILITARY WOMEN'S MEMORIAL 200 N GLEBE RD SUITE 400 ARLINGTON,V A 222033755	52-1513535	501(C)(3)	160,000	0	N/A	N/A	ADOPT A VETERAN PROJECT 110K AND PARTNERHSHIP GALA 50K
(6) WASHINGTON HERITAGE MUSEUMS 1300 CHARLES STREET FREDERICKSBURG,V A 22401	46-0803504	501(C)(3)	150,000	0	N/A	N/A	TO RESTORE RENOVATE AND INTERPRET THE MARY WASHINGTON MONUMENT SITE IN FREDERICKSBURG VA
(7) NATIONAL COAST GUARD MUSEUM ASSOCIATION 78 HOWARD ST SUITE A NEW LONDON,CT 06320	06-1621858	501(C)(3)	100,000	0	N/A	N/A	UNDERWRITE A MUSEUM OVERLOOK AREA DEDICATED TO THE AMERICAN REVOLUTION
(8) BERRY COLLEGE 2277 MARTHA BERRY HWY NW MT BERRY,GA 30149	58-0566133	501(C)(3)	71,000	0	N/A	N/A	TO HELP FUND THE HEALTH SCIENCES BUILDING; SCHOLARSHIPS AND RESEARCH
(9) HINDMAN SETTLEMENT SCHOOL P O BOX 844 HINDMAN,KY 41822	61-0447248	501(C)(3)	61,154	0	N/A	N/A	TO FUND DYSLEXIA SCHOLARSHIPS, CAMPUS GROUND MAINTENANCE, AND HYDROPONIC SYSTEMS
(10) THE VETERAN'S FARM OF NC INC 160 BROOKSTONE DR CAMERON,NC 28326	47-5296346	501(C)(3)	60,000	0	N/A	N/A	TO SUPPORT THE VETERANS FARM OF NC, WHICH HELPS VETERANS BECOME SELF SUFFICIENT FARMERS
(11) FORT TICONDEROGA P O BOX 390 390 FORT TI ROAD TICONDEROGA,NY 12883	14-1440924	501(C)(3)	58,000	0	N/A	N/A	TO ASSIST PHASE 3 OF THE TICONDEROGA SERVICE PROJECT
(12) HILLSIDE SCHOOL INC ROBIN HILL STREET MARLBOROUGH,MA 01752	04-2111216	501(C)(3)	57,305	0	N/A	N/A	TO FUND IB ACCREDITATION AND PURCHASE OF TARPS FOR THE BASEBALL FIELD

(13) MARIAN ANDERSON MUSEUM AND HISTORICAL SOCIETY 762 MARTIN ST PHILADELPHIA, P A 19146	23-2933902	501(C)(3)	40,000	0	N/A	N/A	DONATED \$20K FOR A LOAN OF A DRESS AND \$25K TO BECOME A LEGACY SPONSOR
(14) OPERATION REHABILITATION 3620 PELHAM ROAD SUITE 273 GREENVILLE, SC 29316	84-2981196	501(C)(3)	40,000	0	N/A	N/A	TO CONVERT BASEMENT OF EXISTING FEMALE VETERANS HOME TO A 2 BEDROOM APARTMENT FOR HOMELESS FEMALE VETS
(15) HONOR HER FOUNDATION INC 150 W FAIRFIELD DR PENSACOLA, FL 32506	38-4012413	501(C)(3)	39,946	0	N/A	N/A	TO PURCHASE A CENTRAL AIR CONDITIONING UNIT FOR THE FAITH HOUSE HOMELESS FEMALE VETERANS SHELTER
(16) AMERICAN BATTLEFIELD TRUST 1030 15TH ST NW 900 EAST WASHINGTON, DC 20005	54-1426643	501(C)(3)	37,109	0	N/A	N/A	TO BUILD PATHWAYS OF THE PATRIOTS PROJECT
(17) MUSEUM OF THE AMERICAN REVOLUTION 101 S THIRD STREET PHILADELPHIA, P A 19106	23-2773714	501(C)(3)	30,000	0	N/A	N/A	GRANT FOR THE PATRIOTS OF COLOR INTERACTIVE DIGITAL DISPLAY
(18) USO CAMP PENDLETON BOX 555195 CAMP PENDLETON, C A 92055	13-1610451	501(C)(3)	27,000	0	N/A	N/A	FOR SPOUSE AND FAMILY SUPPORT PROGRAM
(19) ACADEMY OF MUSIC OF PHILADELPHIA INC ONE SOUTH BROAD ST 14TH FLOOR PHILADELPHIA, P A 19107	23-1501159	501(C)(3)	25,000	0	N/A	N/A	HISTORIC PRESERVATION GRANT
(20) NAVY MWR 716 SICARD ST SE SUITE 1000 BLDG 111 WASHINGTON NAVY YARD, DC 20374	92-0879001	501(C)(3)	20,000	0	N/A	N/A	GOLD LEVEL SPONSORSHIP OF THE NAVY WOUNDED WARRIOR, WHICH SUPPORTS WOUNDED WARRIORS AND FAMILIES IN THE NAVY AND COAST GUARD
(21) SEQUOYAH NATIONAL RESEARCH CENTER 2801 S UNIVERSITY AVE LITTLE ROCK, AR 72204	71-0236904	501(C)(3)	20,000	0	N/A	N/A	TO ARCHIVE THE WORDS OF NATIVE PEOPLES, PRESERVE MANUSCRIPTS AND OTHER ARCHIVAL MATERIALS AND BRING THEIR LIBRARY UP TO DATE
(22) TAMASSEE DAR SCHOOL PO BOX 8 TAMASSEE, SC 29686	57-6000973	501(C)(3)	13,991	0	N/A	N/A	DISTRIBUTION OF INCOME FOR FUNDS BENEFITTING THE SCHOOL
(23) USO SAN ANTONIO 3138 RAWLEY CHAMBERS SAN ANTONIO, TX 78234	74-1315272	501(C)(3)	12,310	0	N/A	N/A	MILITARY FAMILY PROGRAMS AT BROOKE ARMY MEDICAL CENTER
(24) ASYMCA OF HAMPTON ROADS 1465 LAKESIDE ROAD VIRGINIA BEACH, V A 23455	54-0525308	501(C)(3)	12,000	0	N/A	N/A	\$10K FOR PATRIOT PANTRY AND \$2K FOR THE MILITARY BALL DESSERT BAR
(25) AFRO-AMERICAN HISTORICAL AND GENEALOGICAL SOCIETY(AAHGS) PO BOX 73067 WASHINGTON, DC 200563067	52-1238303	501(C)(3)	10,000	0	N/A	N/A	PLATINUM SPONSORSHIP FOR THE 2024 AAHS NATIONAL CONFERENCE
(26) ALGONQUIN GARDEN CLUB 4265 LARKSPUR LANE LAKE IN THE HILLS, IL 601564649	38-2458749	501(C)(3)	10,000	0	N/A	N/A	HISTORIC/PRESERVATION GRANT
(27) CHICKAHOMINY INDIAN TRIBE 2895 MT PLEASANT RD PROVIDENCE FORGE TOANO, V A 24140	51-0214164	501(C)(3)	10,000	0	N/A	N/A	\$10K TO FUND THE NATIVE CHICKAHOMINY MUSUEM COLLECTION INDOOR FACILTY RENOVATION
(28) FRIENDS OF JERUSALEM MILL P O BOX 237 KINGSVILLE, MD 21087	52-1432840	501(C)(3)	10,000	0	N/A	N/A	HISTORIC PRESERVATION GRANT

(29) FRIENDS OF MASSIE 207 E GORDON ST SAVANNAH,GA 31401	20-3255300	501(C)(3)	10,000	0	N/A	N/A	HISTORIC PRESERVATION GRANT
(30) HISTORIC TRAPPE P O BOX 26686 TRAPPE,PA 19426	23-3071146	501(C)(3)	10,000	0	N/A	N/A	HISTORIC PRESERVATION GRANT
(31) HOUSTON CHRISTIAN UNIVERSITY 7502 FONDREN DRIVE HOUSTON,TX 77074	74-1400699	501(C)(3)	10,000	0	N/A	N/A	DAR AMERICAN REVOLUTION LEGACY CLASSROOM GRANT
(32) JAMESTOWN REDISCOVERY FOUNDATION 1365 COLONIAL PARKWAY JAMESTOWN,V A 23081	47-2945490	501(C)(3)	10,000	0	N/A	N/A	FOR TO THE JAMESTOWN'S CHURCH TOWER PROJECT
(33) NSCAR 1776 D ST NW ROOM 224 WASHINGTON,DC 20006	53-0116337	501(C)(3)	10,000	0	N/A	N/A	TO CELEBRATE THE 250TH ANNIVERSARY OF USA
(34) SAGINAW CHIPPEWA TRIBLE LIBRARIES 7070 EAST BROADWAY MT PLEASANT,MI 48858	38-6178758	501(C)(3)	10,000	0	N/A	N/A	TO FUND FURNITURE TO ACCOMMODATE COMMUNITY MEMBERS WHO GATHER FOR INSTRUCTION ON VARIOUS ASPECTS OF USING TECHNOLOGY TO ACCESS THE LIBRARY'S E- RESOURCES AND A COMPUTER CART THAT PROVIDES STORAGE AND MAKES CERTAIN ALL LIBRARY LAPTOPS AND TABLES REMAIN FULLY CHARGED AND MAKES IT POSSIBLE TO MOVE THEM TO THE APPROPRIATE SPACE FOR THESE SESSIONS
(35) ST JOSEPH INDIAN SCHOOL 1301 N MAIN CHAMBERLAIN,SD 57325	46-0235912	501(C)(3)	10,000	0	N/A	N/A	TO FUND PURCHASE OF WELLNESS ROOM EQUIPMENT
(36) USO COLORADO 8400 PENA BLVD UNIT 492093 DENVER,C O 80249	13-1610451	501(C)(3)	9,000	0	N/A	N/A	TO SUPPORT TEDDY BEAR CLUB, MILITARY SPOUSE APPRECIATION DAY, AND FOUR USO PROGRAMS IN A BOX
(37) NICHOLAS GIBBS HISTORICAL SOCIETY 9909 EMORY ROAD NE CORRYTON,TN 37721	58-1326772	501(C)(3)	8,200	0	N/A	N/A	HISTORIC PRESERVATION GRANT
(38) WILTON HISTORICAL SOCIETY INC 224 DANBURY ROAD WILTON,CT 068976000	06-6038757	501(C)(3)	7,000	0	N/A	N/A	HISTORIC PRESERVATION GRANT
(39) THE EASTERN CHEROKEE SOUTH IROQUOIS AND UNITED TRIBES OF SOUTH CAROLINA 138 HAGOOD MILL ROAD PICKENS,SC 29671	58-2328510	501(C)(3)	6,200	0	N/A	N/A	TO FUND POW WOW ITEMS
(40) THE NATIONAL MILITARY FAMILY ASSOCIATION 2800 EISENHOWER AVE SUITE 250 ALEXANDRIA,V A 22314	52-0899384	501(C)(3)	6,000	0	N/A	N/A	TO FUND SPONSORSHIP OF FIVE MILITARY CHILDREN TO ATTEND ONE WEEK OR OPERATION PURPLE CAMP

2

Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

40

3

Enter total number of other organizations listed in the line 1 table

0

Part III

Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) CLASSROOM GRANTS	9 7	96,500		N/A	N/A
(2) ESSAY AND VIDEO CONTEST AWARD	1 9	28,500		N/A	N/A
(3) GOOD CITIZENS AWARDS	5 6	44,500		N/A	N/A
(4) OTHER GRANTS TO MILITARY-RELATED PROGRAMS	4	1,598		N/A	N/A
(5) SCHOLARSHIPS	6 3	275,500		N/A	N/A
(5)					
(6)					
(7)					

Part IV

Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
PART I, LINE 2:	NATIONAL SOCIETY DAUGHTERS OF THE AMERICAN REVOLUTION (NSDAR) AWARDS SCHOLARSHIPS TO QUALIFIED APPLICANTS. APPLICANTS MUST BE UNITED STATES CITIZENS AND MUST ATTEND AN ACCREDITED COLLEGE OR UNIVERSITY IN THE UNITED STATES. THE APPLICATION PROCESS IS CONDUCTED WITHOUT REGARD TO RACE, SEX, RELIGION, OR NATIONAL ORIGIN. SCHOLARSHIPS ARE AWARDED BY THE SCHOLARSHIP COMMITTEE BASED ON ACADEMIC EXCELLENCE, COMMITMENT TO FIELD OF STUDY (AS REQUIRED), AND NEED.

Additional Data

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Part I

Questions Regarding Compensation

1a

Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

☐ First-class or charter travel

☐ Travel for companions

☐ Tax idemnification and gross-up payments

☐ Discretionary spending account

☐ Housing allowance or residence for personal use

☐ Payments for business use of personal residence

☐ Health or social club dues or initiation fees

☐ Personal services (e.g., maid, chauffeur, chef)

b

If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2

Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?

3

Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

☒ Compensation committee

☒ Independent compensation consultant

☐ Form 990 of other organizations

☐ Written employment contract

☒ Compensation survey or study

☒ Approval by the board or compensation committee

4

During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

a

Receive a severance payment or change-of-control payment?

b

Participate in, or receive payment from, a supplemental nonqualified retirement plan?

c

Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5

For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

a

The organization?

b

Any related organization?

If "Yes," on line 5a or 5b, describe in Part III.

6

For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

a

The organization?

b

Any related organization?

If "Yes," on line 6a or 6b, describe in Part III.

7

For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III

8

Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

9

If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes

No

1b

2

4a

No

4b

No

4c

No

5a

No

5b

No

6a

No

6b

No

7

No

8

No

9

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Cat. No. 50053T

Schedule J (Form 990) (Rev. 1-2025)

Part II

Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 LESLEY BENN GENERAL COUNSEL	(i)	255,431	0	0	0	48,532	303,963	0
	(ii)	0	0	0	0	0	0	0
2 TORGRIM FORBERG EXECUTIVE DIRECTOR	(i)	193,462	0	0	8,306	65,209	266,977	0
	(ii)	0	0	0	0	0	0	0
3 PATRICIA BREICHNER DIRECTOR OF HUMAN RESOURCES	(i)	154,960	0	0	9,298	49,587	213,845	0
	(ii)	0	0	0	0	0	0	0
4 SANDRA POLLACK DEVELOPMENT DIRECTOR	(i)	152,741	0	0	6,110	51,932	210,783	0
	(ii)	0	0	0	0	0	0	0
5 VICTOR KUNZE DIRECTOR OF INFORMATION SYSTEMS	(i)	152,258	0	0	9,136	48,723	210,117	0
	(ii)	0	0	0	0	0	0	0
6 HEIDI CAMPBELL-SHOAF MUSEUM DIRECTOR AND CHIEF CURATOR	(i)	118,139	0	0	7,088	37,805	163,032	0
	(ii)	0	0	0	0	0	0	0
7 CATHERINE LANDON DIRECTOR OF PUBLIC RELATIONS	(i)	114,096	0	0	6,846	36,511	157,453	0
	(ii)	0	0	0	0	0	0	0

Part III **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Return Reference	Explanation
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Additional Data

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Part I Types of Property										
	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts						
1 Art—Works of art										
2 Art—Historical treasures										
3 Art—Fractional interests										
4 Books and publications										
5 Clothing and household goods										
6 Cars and other vehicles										
7 Boats and planes										
8 Intellectual property										
9 Securities—Publicly traded	X	606	25,862	PUBLISHED MARKET VALUE						
10 Securities—Closely held stock										
11 Securities—Partnership, LLC, or trust interests										
12 Securities—Miscellaneous										
13 Qualified conservation contribution—Historic structures										
14 Qualified conservation contribution—Other										
15 Real estate—Residential										
16 Real estate—Commercial										
17 Real estate—Other										
18 Collectibles										
19 Food inventory										
20 Drugs and medical supplies										
21 Taxidermy										
22 Historical artifacts										
23 Scientific specimens										
24 Archeological artifacts										
25 Other (ARMAMENT ►)	X	2	0							
26 Other ► (CERAMICS)	X	11	0							
27 Other ► (COSTUME)	X	11	0							
28 Other (FURNISHINGS ►)	X	5	0							
Other ► (METALS)	X	6	0							
Other (PHOTOGRAPHY ►)	X	3	0							
Other (SCULPTURE ►)	X	13	0							
Other ► (TEXTILE)	X	21	0							
Other (WORKS ON ► PAPER)	X	12	0							
29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement			29	0						
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?				<table><tr><td></td><td>Yes</td><td>No</td></tr><tr><td>30a</td><td></td><td>No</td></tr></table>		Yes	No	30a		No
	Yes	No								
30a		No								
b If "Yes," describe the arrangement in Part II.										
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?				<table><tr><td>31</td><td>Yes</td><td></td></tr></table>	31	Yes				
31	Yes									
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?				<table><tr><td>32a</td><td></td><td>No</td></tr></table>	32a		No			
32a		No								
b If "Yes," describe in Part II.										
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.										

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Return Reference	Explanation
PART I, LINE 33:	NSDAR ACQUIRES ITS COLLECTIONS, WHICH INCLUDE LIBRARY BOOKS AND HISTORICAL TREASURES OF ITS MUSEUM AND AMERICANA COLLECTION, THROUGH PURCHASE OR DONATION. NSDAR'S COLLECTIONS ARE HELD FOR PUBLIC EXHIBITION, EDUCATION, OR RESEARCH AND ARE PROTECTED AND PRESERVED. AS PERMITTED BY ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA, COLLECTIONS ARE NOT CAPITALIZED OR INCLUDED IN REVENUE BY NSDAR.

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Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 1A	THE TWELVE-MEMBER EXECUTIVE COMMITTEE CONSISTS OF NATIONAL OFFICERS, WHO ARE ALL MEMBERS OF THE NATIONAL BOARD OF MANAGEMENT (NBM). THE COMMITTEE HAS THE AUTHORITY TO MAKE RECOMMENDATIONS TO THE NBM AND PERFORM DUTIES OF THE BOARD BETWEEN MEETINGS, AS DEEMED EXPEDIENT. THE COMMITTEE HAS CHARGE OF ALL INVESTMENTS AND INSURANCE AS WELL AS THE AUTHORITY TO ENTER INTO CONTRACTS AND AGREEMENTS CONCERNING THE BUSINESS OF THE SOCIETY. IT ALSO MAKES RECOMMENDATIONS CONCERNING THE BUDGET TO THE NBM.
FORM 990, PART VI, SECTION A, LINE 6	THE ORGANIZATION HAS MEMBERS IN THE NATIONAL SOCIETY THROUGH A CHAPTER OR AS A MEMBER-AT-LARGE.
FORM 990, PART VI, SECTION A, LINE 7A	EXECUTIVE OFFICERS ARE ELECTED BY MEMBERS AT THE ANNUAL MEETING, CONTINENTAL CONGRESS, EVERY THREE YEARS. ELECTIONS FOR THREE-YEAR TERMS FOR OTHER NBM POSITIONS ARE HELD ANNUALLY ON A ROTATING BASIS AT THE ANNUAL MEETING. OTHER HONORARY OFFICERS ARE ALSO ELECTED BY MEMBERS AT CONTINENTAL CONGRESS.
FORM 990, PART VI, SECTION A, LINE 7B	VOTING MEMBERS (STATE AND CHAPTER REGENTS AND DELEGATES) AT THE ANNUAL MEETING, CONTINENTAL CONGRESS VOTE BY BALLOT UPON QUESTIONS INVOLVING NEW PROJECTS OR SPECIAL APPROPRIATIONS. 300 VOTING MEMBERS CONSTITUTE A QUORUM.
FORM 990, PART VI, SECTION B, LINE 11B	THE DETAILED REVIEW OF FORM 990 WILL BE CONDUCTED BY THE HEAD OF FINANCE. THE FINAL DRAFT OF FORM 990 WILL BE REVIEWED BY ALL MEMBERS OF THE FINANCE COMMITTEE PRIOR TO FILING.
FORM 990, PART VI, SECTION B, LINE 12C	MANAGEMENT AND THE EXECUTIVE COMMITTEE MONITOR PROPOSED OR ONGOING TRANSACTIONS FOR POTENTIAL CONFLICTS. THE CONFLICT OF INTEREST POLICY COVERS ALL NATIONAL BOARD OF MANAGEMENT MEMBERS, AS WELL AS NATIONAL COMMITTEE CHAIRMEN. THOSE COVERED UNDER THE POLICY HAVE A DUTY TO DISCLOSE ANY DIRECT OR INDIRECT FINANCIAL INTEREST. ANY DISCLOSED FINANCIAL INTERESTS ARE REVIEWED AND DISCUSSED BY THE AUDIT COMMITTEE IN CONJUNCTION WITH IN-HOUSE LEGAL COUNSEL, WHICH THEN DECIDES IF A CONFLICT OF INTEREST EXISTS AND DETERMINES WHETHER OR NOT TO ENTER INTO THE TRANSACTION/ARRANGEMENT. THE AUDIT COMMITTEE ALSO QUESTIONS ANY NBM MEMBER WHO MAY HAVE FAILED TO DISCLOSE ACTUAL OR POTENTIAL CONFLICTS OF INTEREST. IF THE COMMITTEE DETERMINES SUCH FAILURE TOOK PLACE, IT IS AUTHORIZED TO TAKE APPROPRIATE DISCIPLINARY OR CORRECTIVE ACTION.
FORM 990, PART VI, SECTION B, LINE 15	COMPENSATION FOR TOP MANAGEMENT POSITIONS ARE REVIEWED ANNUALLY WITH THE HUMAN RESOURCES COMMITTEE. IN ADDITION, THE PRESIDENT GENERAL APPROVES ANY COMPENSATION CHANGES FOR TOP MANAGEMENT POSITIONS. A COMPREHENSIVE SALARY STUDY IS CONDUCTED EVERY THREE YEARS. COMPARABILITY DATA IS OBTAINED AND REVIEWED ANNUALLY. THE PROCESS DESCRIBED HERE WAS LAST COMPLETED IN 2024.
FORM 990, PART VI, SECTION C, LINE 19	THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST. IN ADDITION, BYLAWS ARE AVAILABLE TO MEMBERS ON THE MEMBERS WEBSITE AND ARE AVAILABLE FOR SALE AS PART OF THE MEMBER HANDBOOK TO ANYONE WHO VISITS NSDAR HEADQUARTERS.
FORM 990, PART XI, LINE 9:	NET CHANGE IN VALUE OF SPLIT INTEREST 156,833.

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Cat. No. 51056K

Schedule O (Form 990) (Rev. 1-2025)

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