

Form **990**  
Department of the Treasury  
Internal Revenue Service

# Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)  
Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047  
**2023**  
Open to Public Inspection

**A For the 2023 calendar year, or tax year beginning 08-01-2023, and ending 07-31-2024**

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Final return/terminated  
 Amended return  
 Application pending

**C** Name of organization: THE TAU BETA PI ASSOCIATION INC  
 Doing business as  
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
 PO Box 2697  
 City or town, state or province, country, and ZIP or foreign postal code  
 Knoxville, TN 379012697

**D** Employer identification number: 62-0479545

**E** Telephone number: (865) 546-4578

**G** Gross receipts \$ 5,235,100

**F** Name and address of principal officer:  
 CURTIS D GOMULINSKI  
 PO BOX 2697  
 KNOXVILLE, TN 379012697

**H(a)** Is this a group return for subordinates?  Yes  No  
**H(b)** Are all subordinates included?  Yes  No  
 If "No," attach a list. See instructions.  
**H(c)** Group exemption number

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: www.tbp.org

**K** Form of organization:  Corporation  Trust  Association  Other

**L** Year of formation: 1885 **M** State of legal domicile: TN

## Part I Summary

|   |  |  |            |              |            |
|---|--|--|------------|--------------|------------|
| Activities & Governance   | <b>1</b> Briefly describe the organization's mission or most significant activities:<br>As the only academic honor society that confers recognition on eligible individuals from all engineering disciplines, Tau Beta Pi recognizes those who have conferred honor upon their Alma Maters by distinguished scholarship and exemplary character as students in engineering, or by their attainments as alumni in the field of engineering, provides leadership and professional development training for engineering students and alumni members, and promotes lifelong alumnus member involvement and cultivates a community of dedicated high achievers. |  |            |              |            |
|   | <b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.   |  |            |              |            |
|   | <b>3</b> Number of voting members of the governing body (Part VI, line 1a)   | <b>3</b>   | 9          |              |            |
|   | <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)   | <b>4</b>   | 9          |              |            |
|   | <b>5</b> Total number of individuals employed in calendar year 2023 (Part V, line 2a)  | <b>5</b>   | 17         |              |            |
|   | <b>6</b> Total number of volunteers (estimate if necessary)  | <b>6</b>   | 150        |              |            |
|   | <b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12   | <b>7a</b>  | 0          |              |            |
| <b>b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11             | <b>7b</b>  | 0  |            |              |            |
| Revenue   | <b>8</b> Contributions and grants (Part VIII, line 1h)   | Prior Year   | 2,102,743  | Current Year | 2,697,392  |
|   | <b>9</b> Program service revenue (Part VIII, line 2g)  |  | 582,521    |              | 813,534    |
|   | <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)  |  | 1,918,017  |              | 1,518,772  |
|   | <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)   |  | -49,984    |              | -27,620    |
|   | <b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)   |  | 4,553,297  |              | 5,002,078  |
|   | Expenses   | <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) |            | 890,088      |            |
| <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)                     |  |  | 750        |              | 964        |
| <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) |  |  | 1,149,105  |              | 1,169,095  |
| <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)                    |  |  | 19,050     |              | 12,700     |
| <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) 487,932                  |  |  |            |              |            |
| <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)                      |  |  | 1,696,616  |              | 1,826,940  |
| <b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)         |  | 3,755,609  |            | 3,829,514    |            |
| <b>19</b> Revenue less expenses. Subtract line 18 from line 12                              |  | 797,688  |            | 1,172,564    |            |
| Net Assets or Fund Balances   | <b>20</b> Total assets (Part X, line 16)   | Beginning of Current Year  | 41,708,420 | End of Year  | 45,879,819 |
|   | <b>21</b> Total liabilities (Part X, line 26)  |  | 2,703,939  |              | 2,459,956  |
|   | <b>22</b> Net assets or fund balances. Subtract line 21 from line 20   |  | 39,004,481 |              | 43,419,863 |

## Part II Signature Block

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

**Sign Here**

Signature of officer: Curtis Gomulinski Executive Director  
 Date: 2025-05-23

Print/Type preparer's name: Preparer's signature: Date: Check  if self-employed PTIN

**Paid Preparer Use Only**

Firm's name: Firm's EIN

Firm's address: Phone no.

**Part III Statement of Program Service Accomplishments**

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

**1** Briefly describe the organization's mission:

As the only academic honor society that confers recognition on eligible individuals from all engineering disciplines, Tau Beta Pi recognizes those who have conferred honor upon their Alma Maters by distinguished scholarship and exemplary character as students in engineering, or by their attainments as alumni in the field of engineering, provides leadership and professional development training for engineering students and alumni members, and promotes lifelong alumnus member involvement and cultivates a community of dedicated high achievers.

**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 \$ 874,088 including grants of \$ 804,450 ) (Revenue \$ 756,763 )  
Description: See Additional Data

**4b** (Code: ) (Expenses \$ 469,770 including grants of \$ 0 ) (Revenue \$ 93,933 )  
Description: See Additional Data

**4c** (Code: ) (Expenses \$ 1,097,685 including grants of \$ 1,365 ) (Revenue \$ 390,082 )  
Description: See Additional Data

**4d** Other program services (Describe in Schedule O.)  
(Expenses \$ 768,397 including grants of \$ 14,000 ) (Revenue \$ 20,621 )

(Code: ) (Expenses \$ 768,397 including grants of \$ 14,000 ) (Revenue \$ 20,621 )

Members elected and initiated by college chapters received material to denote their lifetime affiliation with Tau Beta Pi. Various Association awards were presented to selected members and chapters for outstanding service and achievements. (See Schedule I)

**4e** Total program service expenses 3,209,940

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Question Text, and Yes/No response. Rows include questions 1 through 21, with sub-questions a-f for items 10, 11, and 14. Each row has a corresponding 'Yes' or 'No' in the rightmost column.

Part IV Checklist of Required Schedules (continued)

Table with 3 main columns: Question number, Question text, and Yes/No columns. Rows include questions 22 through 38 regarding organizational reporting, compensation, and tax-exempt status.

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 [ ]

Table with 3 main columns: Question number, Question text, and Yes/No columns. Rows include questions 1a, 1b, and 1c regarding Form 1096, Forms W-2G, and backup withholding rules.

**Part V Statements Regarding Other IRS Filings and Tax Compliance** (continued)

|   |  |            |     |    |
|---|--|------------|-----|----|
| <p><b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . . .</p>  | <p><b>2a</b> <span style="float: right;">17</span></p> |            |     |    |
| <p><b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?</p>  |  | <b>2b</b>  | Yes |    |
| <p><b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . .</p>  |  | <b>3a</b>  |     | No |
| <p><b>b</b> If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation in Schedule O</i> . . . .</p>  |  | <b>3b</b>  |     |    |
| <p><b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . .</p> |  | <b>4a</b>  |     | No |
| <p><b>b</b> If "Yes," enter the name of the foreign country: _____<br/>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).</p>  |  |            |     |    |
| <p><b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . .</p>  |  | <b>5a</b>  |     | No |
| <p><b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</p>  |  | <b>5b</b>  |     | No |
| <p><b>c</b> If "Yes," to line 5a or 5b, did the organization file Form 8886-T? . . . . .</p>  |  | <b>5c</b>  |     |    |
| <p><b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .</p>                                  |  | <b>6a</b>  |     | No |
| <p><b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .</p>   |  | <b>6b</b>  |     |    |
| <p><b>7 Organizations that may receive deductible contributions under section 170(c).</b></p>   |  |            |     |    |
| <p><b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .</p>   |  | <b>7a</b>  |     | No |
| <p><b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .</p>   |  | <b>7b</b>  |     |    |
| <p><b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .</p>  |  | <b>7c</b>  |     | No |
| <p><b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year . . . . .</p>   | <p><b>7d</b></p>                                       |            |     |    |
| <p><b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</p>   |  | <b>7e</b>  |     | No |
| <p><b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . .</p>  |  | <b>7f</b>  |     | No |
| <p><b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .</p>  |  | <b>7g</b>  |     |    |
| <p><b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .</p>  |  | <b>7h</b>  |     |    |
| <p><b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .</p>   |  | <b>8</b>   |     |    |
| <p><b>9 Sponsoring organizations maintaining donor advised funds.</b></p>   |  |            |     |    |
| <p><b>a</b> Did the sponsoring organization make any taxable distributions under section 4966? . . . . .</p>  |  | <b>9a</b>  |     |    |
| <p><b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .</p>   |  | <b>9b</b>  |     |    |
| <p><b>10 Section 501(c)(7) organizations.</b> Enter:</p>  |  |            |     |    |
| <p><b>a</b> Initiation fees and capital contributions included on Part VIII, line 12 . . . . .</p>  | <b>10a</b>   |            |     |    |
| <p><b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</p>   | <b>10b</b>   |            |     |    |
| <p><b>11 Section 501(c)(12) organizations.</b> Enter:</p>   |  |            |     |    |
| <p><b>a</b> Gross income from members or shareholders . . . . .</p>   | <b>11a</b>   |            |     |    |
| <p><b>b</b> Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . . .</p>   | <b>11b</b>   |            |     |    |
| <p><b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?</p>  |  |            |     |    |
| <p><b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year.</p>  | <b>12b</b>   |            |     |    |
| <p><b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b></p>   |  |            |     |    |
| <p><b>a</b> Is the organization licensed to issue qualified health plans in more than one state? . . . . .<br/><b>Note.</b> See the instructions for additional information the organization must report on Schedule O.</p>   |  | <b>13a</b> |     |    |
| <p><b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .</p>   | <b>13b</b>   |            |     |    |
| <p><b>c</b> Enter the amount of reserves on hand . . . . .</p>  | <b>13c</b>   |            |     |    |
| <p><b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? . . . . .</p>  |  | <b>14a</b> |     | No |
| <p><b>b</b> If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation in Schedule O</i> . . . .</p>  |  | <b>14b</b> |     |    |
| <p><b>15</b> 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? . . . . .<br/>If "Yes," see the instructions and file Form 4720, Schedule N.</p>            |  | <b>15</b>  |     | No |
| <p><b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? . . .<br/>If "Yes," complete Form 4720, Schedule O.</p>  |  | <b>16</b>  |     | No |
| <p><b>17 Section 501(c)(21) organizations.</b> 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? . . . . .<br/>If "Yes," complete Form 6069.</p>  |  | <b>17</b>  |     |    |

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



Section A. Governing Body and Management

Table with 3 main columns: Question, Yes, No. Rows include: 1a (Voting members), 1b (Independent members), 2 (Family relationships), 3 (Management delegation), 4 (Governing documents), 5 (Asset diversion), 6 (Members/stockholders), 7a (Election power), 7b (Governance decisions), 8 (Meeting documentation), 8a (Governing body), 8b (Committee authority), 9 (Officer/director/trustee).

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

Table with 3 main columns: Question, Yes, No. Rows include: 10a (Local chapters), 10b (Policies for chapters), 11a (Form 990 distribution), 11b (Review process), 12a (Conflict of interest policy), 12b (Disclosure of interests), 12c (Policy enforcement), 13 (Whistleblower policy), 14 (Document retention), 15 (Compensation review), 15a (CEO review), 15b (Other officers review), 16a (Investment in taxable entities), 16b (Joint venture policy).

Section C. Disclosure

Table with 2 main columns: Question, Answer. Rows include: 17 (States for Form 990), 18 (Public inspection of Form 1023), 19 (Governing documents availability), 20 (Person with books and records).

**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)<br>Name and title   | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |         | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>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) Curtis Gomulinski<br>Executive Director                                   | 50   | X   |                       | X       |              | X                            | 110,724 | 0   | 13,782   |   |
| (2) Rachel Alexander<br>Executive Councillor, 2023 President                  | 5  | X   |                       | X       |              |                              | 0       | 0   | 0  |   |
| (3) Ron Hickling<br>Executive Councillor, 2023 Vice President, 2024 President | 5  | X   |                       | X       |              |                              | 0       | 0   | 0  |   |
| (4) Marla Peterson<br>Executive Councillor, 2024 Vice President               | 5  | X   |                       | X       |              |                              | 0       | 0   | 0  |   |
| (5) Michael Peterson<br>Executive Councillor, 2023 Secretary                  | 5  | X   |                       | X       |              |                              | 0       | 0   | 0  |   |
| (6) Henry Houh<br>Executive Councillor, 2024 Secretary                        | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (7) Michael Hand<br>Executive Councillor, 2023-24 Treasurer                   | 5  | X   |                       | X       |              |                              | 0       | 0   | 0  |   |
| (8) Colleen Hill-Stramsak<br>Executive Councillor                             | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (9) Ming De Lin<br>Executive Councillor                                       | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (10) Thomas Pinkham<br>Executive Councillor                                   | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (11) Joan Sciacca<br>Executive Councillor                                     | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (12) George Youssef<br>Executive Councillor                                   | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (13) Mennatoallah Youssef<br>Executive Councillor                             | 5  | X   |                       |         |              |                              | 0       | 0   | 0  |   |
| (14) Vanguard<br>Trustee  | 1  |   | X                     |         |              |                              | 0       | 0   | 0  |   |



**Part VIII Statement of Revenue**

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

|   |   | (A)<br>Total revenue                                     | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from<br>tax under sections<br>512 - 514 |   |
|---|---|--|--|---|--|---|
| <b>Contributions, Gifts, Grants<br/>and Other Similar Amounts</b>   | <b>1a</b> Federated campaigns . . . . .   | <b>1a</b> 461  |  |   |  |   |
|   | <b>b</b> Membership dues . . . . .  | <b>1b</b> 257,639  |  |   |  |   |
|   | <b>c</b> Fundraising events . . . . .   | <b>1c</b> 0  |  |   |  |   |
|   | <b>d</b> Related organizations . . . . .  | <b>1d</b> 0  |  |   |  |   |
|   | <b>e</b> Government grants (contributions) . . . . .  | <b>1e</b> 0  |  |   |  |   |
|   | <b>f</b> All other contributions, gifts, grants,<br>and similar amounts not included<br>above . . . . . | <b>1f</b> 2,439,292                                      |  |   |  |   |
|   | <b>g</b> Noncash contributions included in<br>lines 1a - 1f:\$ . . . . .                                | <b>1g</b> 36,006   |  |   |  |   |
|   | <b>h Total.</b> Add lines 1a-1f . . . . .   |  | 2,697,392  |   |  |   |
| <b>Program Service Revenue</b>  | <b>2a</b> Employment Advertisements   | Business Code<br>541800                                  | 3,300  | 3,300                                   | 0  | 0 |
|   | <b>b</b> Split Interest Agreements  | 525920   | 379,292  | 379,292                                 | 0  | 0 |
|   | <b>c</b> Annual Convention  | 611600   | 272,286  | 272,286                                 | 0  | 0 |
|   | <b>d</b> Member Publications  | 541800   | 122,795  | 122,795                                 | 0  | 0 |
|   | <b>e</b>  |  |  |   |  |   |
|   | <b>f</b> All other program service revenue.   |  | 35,861   | 35,861                                  | 0  | 0 |
|   | <b>g Total.</b> Add lines 2a-2f. . . . .  |  | 813,534  |   |  |   |
| <b>Other Revenue</b>  | <b>3</b> Investment income (including dividends, interest, and other<br>similar amounts) . . . . .      |  | 1,518,680  | 1,518,680                               | 0  | 0 |
|   | <b>4</b> Income from investment of tax-exempt bond proceeds . . . . .                                   |  | 0  | 0                                       | 0  | 0 |
|   | <b>5</b> Royalties . . . . .  |  | 0  | 0                                       | 0  | 0 |
|   | <b>6a</b> Gross rents   | (i) Real   |  |   |  |   |
|   |   | (ii) Personal  |  |   |  |   |
|   |   | <b>6a</b>  | 0  | 0                                       |  |   |
|   |   | <b>b</b> Less: rental expenses                           | <b>6b</b> 0  | 0                                       |  |   |
|   | <b>c</b> Rental income or (loss)  | <b>6c</b> 0  | 0  |   |  |   |
|   | <b>d</b> Net rental income or (loss) . . . . .  |  | 0  | 0                                       | 0  | 0 |
|   | <b>7a</b> Gross amount from sales of<br>assets other than inventory                                     | (i) Securities   |  |   |  |   |
|   |   | (ii) Other   |  |   |  |   |
|   |   | <b>7a</b>  | 36,098   | 0                                       |  |   |
|   |   | <b>b</b> Less: cost or other basis and<br>sales expenses | <b>7b</b> 36,006                                   | 0                                       |  |   |
|   | <b>c</b> Gain or (loss)   | <b>7c</b> 92   | 0  |   |  |   |
|   | <b>d</b> Net gain or (loss) . . . . .   |  | 92   | 92                                      | 0  | 0 |
| <b>8a</b> Gross income from fundraising events<br>(not including \$ 0 of<br>contributions reported on line 1c).<br>See Part IV, line 18 . . . . . |   |  |  |   |  |   |
|   | <b>8a</b>   | 0  |  |   |  |   |
|   | <b>b</b> Less: direct expenses . . . . .  | <b>8b</b> 0  |  |   |  |   |
| <b>c</b> Net income or (loss) from fundraising events . . . . .   |   | 0  | 0  | 0                                       | 0  |   |
| <b>9a</b> Gross income from gaming activities.<br>See Part IV, line 19 . . . . .  |   |  |  |   |  |   |
|   | <b>9a</b>   | 0  |  |   |  |   |
|   | <b>b</b> Less: direct expenses . . . . .  | <b>9b</b> 0  |  |   |  |   |
| <b>c</b> Net income or (loss) from gaming activities . . . . .  |   | 0  | 0  | 0                                       | 0  |   |
| <b>10a</b> Gross sales of inventory, less<br>returns and allowances . . . . .   |   |  |  |   |  |   |
|   | <b>10a</b>  | 169,396  |  |   |  |   |
|   | <b>b</b> Less: cost of goods sold . . . . .   | <b>10b</b> 197,016                                       |  |   |  |   |
| <b>c</b> Net income or (loss) from sales of inventory . . . . .   |   | -27,620  | -27,620  | 0                                       | 0  |   |
| <b>Miscellaneous Revenue</b>  | <b>11a</b>  | Business Code  |  |   |  |   |
|   | <b>b</b>  |  |  |   |  |   |
|   | <b>c</b>  |  |  |   |  |   |
|   | <b>d</b> All other revenue . . . . .  |  |  |   |  |   |
|   | <b>e Total.</b> Add lines 11a-11d . . . . .   |  | 0  |   |  |   |
| <b>12 Total revenue.</b> See instructions . . . . .   |   | 5,002,078  | 2,304,686  | 0                                       | 0  |   |

**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)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|---|-----------------------|---------------------------------|--|-----------------------------|
| <b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .   | 9,450                 | 9,450                           |  |                             |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .  | 810,365               | 810,365                         |  |                             |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16. . . . .  | 0                     | 0                               |  |                             |
| <b>4</b> Benefits paid to or for members . . . . .  | 964                   | 964                             |  |                             |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees . . . . .   | 167,799               | 98,726                          | 69,073                                 | 0                           |
| <b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>7</b> Other salaries and wages . . . . .   | 824,253               | 624,096                         | 0                                      | 200,157                     |
| <b>8</b> Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions) . . . . .  | 26,100                | 19,194                          | 0                                      | 6,906                       |
| <b>9</b> Other employee benefits . . . . .  | 77,059                | 59,185                          | 0                                      | 17,874                      |
| <b>10</b> Payroll taxes . . . . .   | 73,884                | 54,052                          | 4,666                                  | 15,166                      |
| <b>11</b> Fees for services (non-employees):  |                       |                                 |  |                             |
| <b>a</b> Management . . . . .   | 0                     | 0                               | 0                                      | 0                           |
| <b>b</b> Legal . . . . .  | 1,012                 | 898                             | 13                                     | 101                         |
| <b>c</b> Accounting . . . . .   | 18,000                | 15,975                          | 225                                    | 1,800                       |
| <b>d</b> Lobbying . . . . .   | 0                     | 0                               | 0                                      | 0                           |
| <b>e</b> Professional fundraising services. See Part IV, line 17  | 12,700                |                                 |  | 12,700                      |
| <b>f</b> Investment management fees . . . . .   | 74,638                | 74,638                          | 0                                      | 0                           |
| <b>g</b> Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)   | 103,801               | 85,088                          | 8,506                                  | 10,207                      |
| <b>12</b> Advertising and promotion . . . . .   | 1,576                 | 1,211                           | 166                                    | 199                         |
| <b>13</b> Office expenses . . . . .   | 121,951               | 104,621                         | 2,435                                  | 14,895                      |
| <b>14</b> Information technology . . . . .  | 36,716                | 26,052                          | 1,219                                  | 9,445                       |
| <b>15</b> Royalties . . . . .   | 0                     | 0                               | 0                                      | 0                           |
| <b>16</b> Occupancy . . . . .   | 27,693                | 23,539                          | 297                                    | 3,857                       |
| <b>17</b> Travel . . . . .  | 309,422               | 251,680                         | 29,431                                 | 28,311                      |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>19</b> Conferences, conventions, and meetings . . . . .  | 581,469               | 567,116                         | 14,353                                 | 0                           |
| <b>20</b> Interest . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>21</b> Payments to affiliates . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>22</b> Depreciation, depletion, and amortization . . . . .   | 8,693                 | 7,759                           | 93                                     | 841                         |
| <b>23</b> Insurance . . . . .   | 11,814                | 10,269                          | 140                                    | 1,405                       |
| <b>24</b> 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.)                                       |                       |                                 |  |                             |
| <b>a</b> Insignia & Certificates for New Members  | 111,976               | 111,976                         | 0                                      | 0                           |
| <b>b</b> Awards & Recognition   | 3,902                 | 3,881                           | 3                                      | 18                          |
| <b>c</b> Magazine Printing & Mailing  | 218,872               | 218,872                         | 0                                      | 0                           |
| <b>d</b> Alumni Giving Program Printing & Mailing   | 161,573               | 0                               | 0                                      | 161,573                     |
| <b>e</b> All other expenses   | 33,832                | 30,333                          | 1,022                                  | 2,477                       |
| <b>25</b> Total functional expenses. Add lines 1 through 24e  | 3,829,514             | 3,209,940                       | 131,642                                | 487,932                     |
| <b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). |                       |                                 |  |                             |

**Part X Balance Sheet**

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

|   |  | (A)<br>Beginning of year |            | (B)<br>End of year |
|---|--|--------------------------|------------|--------------------|
| <b>Assets</b>   | <b>1</b> Cash—non-interest-bearing . . . . .   | 672,275                  | <b>1</b>   | 763,006            |
|   | <b>2</b> Savings and temporary cash investments . . . . .  | 1,812                    | <b>2</b>   | 7,363              |
|   | <b>3</b> Pledges and grants receivable, net . . . . .  | 321,905                  | <b>3</b>   | 256,109            |
|   | <b>4</b> Accounts receivable, net . . . . .  | 42,327                   | <b>4</b>   | 17,034             |
|   | <b>5</b> 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       | 0                        | <b>5</b>   | 0                  |
|   | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) . . . . .   | 0                        | <b>6</b>   | 0                  |
|   | <b>7</b> Notes and loans receivable, net . . . . .   | 13,078                   | <b>7</b>   | 18,078             |
|   | <b>8</b> Inventories for sale or use . . . . .   | 105,010                  | <b>8</b>   | 102,737            |
|   | <b>9</b> Prepaid expenses and deferred charges . . . . .   | 50,013                   | <b>9</b>   | 65,670             |
|   | <b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D   | <b>10a</b> 206,116       |            |                    |
|   | <b>b</b> Less: accumulated depreciation  | <b>10b</b> 118,691       | 92,191     | <b>10c</b> 87,425  |
|   | <b>11</b> Investments—publicly traded securities . . . . .   | 38,869,313               | <b>11</b>  | 42,591,802         |
|   | <b>12</b> Investments—other securities. See Part IV, line 11 . . . . .   | 0                        | <b>12</b>  | 0                  |
|   | <b>13</b> Investments—program-related. See Part IV, line 11 . . . . .  | 1,540,496                | <b>13</b>  | 1,970,595          |
|   | <b>14</b> Intangible assets . . . . .  | 0                        | <b>14</b>  | 0                  |
|   | <b>15</b> Other assets. See Part IV, line 11 . . . . .   | 0                        | <b>15</b>  | 0                  |
| <b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) . . . . . | 41,708,420   | <b>16</b>                | 45,879,819 |                    |
| <b>Liabilities</b>  | <b>17</b> Accounts payable and accrued expenses . . . . .  | 459,784                  | <b>17</b>  | 368,597            |
|   | <b>18</b> Grants payable . . . . .   | 873,000                  | <b>18</b>  | 824,250            |
|   | <b>19</b> Deferred revenue . . . . .   | 388,972                  | <b>19</b>  | 309,918            |
|   | <b>20</b> Tax-exempt bond liabilities . . . . .  | 0                        | <b>20</b>  | 0                  |
|   | <b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D  | 0                        | <b>21</b>  | 0                  |
|   | <b>22</b> 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 . . . . . | 0                        | <b>22</b>  | 0                  |
|   | <b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .   | 0                        | <b>23</b>  | 0                  |
|   | <b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .   | 0                        | <b>24</b>  | 0                  |
|   | <b>25</b> 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  | 982,183                  | <b>25</b>  | 957,191            |
|   | <b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .   | 2,703,939                | <b>26</b>  | 2,459,956          |
| <b>Net Assets or Fund Balances</b>  | <b>Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.</b>   |                          |            |                    |
|   | <b>27</b> Net assets without donor restrictions . . . . .  | 20,313,743               | <b>27</b>  | 22,277,619         |
|   | <b>28</b> Net assets with donor restrictions . . . . .   | 18,690,738               | <b>28</b>  | 21,142,244         |
|   | <b>Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.</b>  |                          |            |                    |
|   | <b>29</b> Capital stock or trust principal, or current funds . . . . .   |                          | <b>29</b>  |                    |
|   | <b>30</b> Paid-in or capital surplus, or land, building or equipment fund . . . . .  |                          | <b>30</b>  |                    |
|   | <b>31</b> Retained earnings, endowment, accumulated income, or other funds   |                          | <b>31</b>  |                    |
| <b>32</b> Total net assets or fund balances . . . . .                         | 39,004,481   | <b>32</b>                | 43,419,863 |                    |
| <b>33</b> Total liabilities and net assets/fund balances . . . . .            | 41,708,420   | <b>33</b>                | 45,879,819 |                    |

**Part XI Reconciliation of Net Assets**

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

|           |  |           |            |
|-----------|--|-----------|------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12)  | <b>1</b>  | 5,002,078  |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)   | <b>2</b>  | 3,829,514  |
| <b>3</b>  | Revenue less expenses. Subtract line 2 from line 1   | <b>3</b>  | 1,172,564  |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | <b>4</b>  | 39,004,481 |
| <b>5</b>  | Net unrealized gains (losses) on investments   | <b>5</b>  | 3,203,688  |
| <b>6</b>  | Donated services and use of facilities   | <b>6</b>  | 39,130     |
| <b>7</b>  | Investment expenses  | <b>7</b>  | 0          |
| <b>8</b>  | Prior period adjustments   | <b>8</b>  | 0          |
| <b>9</b>  | Other changes in net assets or fund balances (explain in Schedule O)   | <b>9</b>  | 0          |
| <b>10</b> | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | <b>10</b> | 43,419,863 |

**Part XII Financial Statements and Reporting**

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

- 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
- 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
- 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.
- 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?
- 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.

|           | Yes | No |
|-----------|-----|----|
| <b>2a</b> |     | No |
| <b>2b</b> | Yes |    |
| <b>2c</b> | Yes |    |
| <b>3a</b> |     | No |
| <b>3b</b> |     |    |

## Additional Data

**Software ID:** 23018249

**Software Version:** v1.00

**EIN:** 62-0479545

**Name:** THE TAU BETA PI ASSOCIATION INC

Form 990 (2023)

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**Form 990, Part III, Line 4a:**

Awarded \$10,000 fellowships to 30 students for a year of graduate study. Awarded 15 \$1,000, and 238 \$2,000 scholarships to 253 engineering seniors. 6 college freshman received \$1,500 for engineering study. \$4,000 in scholarships were available to students selected by 8 chapters.

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**Form 990, Part III, Line 4b:**

Published a quarterly magazine with a circulation of over 80,000 for members. Features include news of the Association, chapters, and members and articles on engineering. Also published an online newsletter on college activities and leadership information with a circulation of 11,000 engineering juniors and seniors.

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**Form 990, Part III, Line 4c:**

Convention, District, Engineering Futures, MindSET, Greater Interest in Government (GIG), Student Assistance Held national and regional meetings of its members where collegiate chapter officers receive leadership training, professional development, and chapter operations training. Students receive training in possible service activities including tutoring students, counseling high-schoolers, training K-12 math and science students, and providing volunteers and funds to other charities.

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**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
▶ Attach to Form 990 or Form 990-EZ.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

**Open to Public Inspection**

**Name of the organization**  
THE TAU BETA PI ASSOCIATION INC

**Employer identification number**  
62-0479545

**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 |   |   |
|                                    |          |  |   |    |   |   |
| <b>Total</b>                       |          |  |   |    |   |   |

**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.)

| <b>Section A. Public Support</b>   |                 |                 |                 |                 |                 |                  |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|------------------|
| <b>Calendar year<br/>(or fiscal year beginning in) ▶</b>   | <b>(a) 2019</b> | <b>(b) 2020</b> | <b>(c) 2021</b> | <b>(d) 2022</b> | <b>(e) 2023</b> | <b>(f) Total</b> |
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .   |                 |                 |                 |                 |                 |                  |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . . .  |                 |                 |                 |                 |                 |                  |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge..   |                 |                 |                 |                 |                 |                  |
| <b>4 Total.</b> Add lines 1 through 3  |                 |                 |                 |                 |                 |                  |
| <b>5</b> 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) . . . |                 |                 |                 |                 |                 |                  |
| <b>6 Public support.</b> Subtract line 5 from line 4.  |                 |                 |                 |                 |                 |                  |

| <b>Section B. Total Support</b>  |                 |                 |                 |                 |                 |                  |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|------------------|
| <b>Calendar year<br/>(or fiscal year beginning in) ▶</b>   | <b>(a) 2019</b> | <b>(b) 2020</b> | <b>(c) 2021</b> | <b>(d) 2022</b> | <b>(e) 2023</b> | <b>(f) Total</b> |
| <b>7</b> Amounts from line 4. . .  |                 |                 |                 |                 |                 |                  |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . . .   |                 |                 |                 |                 |                 |                  |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on. . .   |                 |                 |                 |                 |                 |                  |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . .  |                 |                 |                 |                 |                 |                  |
| <b>11 Total support.</b> Add lines 7 through 10  |                 |                 |                 |                 |                 |                  |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .  |                 |                 |                 |                 | <b>12</b>       |                  |
| <b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ▶ <input type="checkbox"/> |                 |                 |                 |                 |                 |                  |

| <b>Section C. Computation of Public Support Percentage</b>  |           |  |  |  |  |  |
|---|-----------|--|--|--|--|--|
| <b>14</b> Public support percentage for 2023 (line 6, column (f) divided by line 11, column (f)) . . . . .  | <b>14</b> |  |  |  |  |  |
| <b>15</b> Public support percentage for 2022 Schedule A, Part II, line 14 . . . . .   | <b>15</b> |  |  |  |  |  |
| <b>16a 33 1/3% support test—2023.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>   |           |  |  |  |  |  |
| <b>b 33 1/3% support test—2022.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>  |           |  |  |  |  |  |
| <b>17a 10%-facts-and-circumstances test—2023.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>    |           |  |  |  |  |  |
| <b>b 10%-facts-and-circumstances test—2022.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/> |           |  |  |  |  |  |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ▶ <input type="checkbox"/>   |           |  |  |  |  |  |

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 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<br>(or fiscal year beginning in) ▶  | (a) 2019  | (b) 2020  | (c) 2021  | (d) 2022  | (e) 2023  | (f) Total  |
|---|-----------|-----------|-----------|-----------|-----------|------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")   | 2,990,191 | 2,755,216 | 2,689,277 | 2,102,743 | 2,697,392 | 13,234,819 |
| <b>2</b> 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 | 404,758   | 236,876   | 185,866   | 582,521   | 813,534   | 2,223,555  |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513   | 0         | 0         | 0         | 0         |           | 0          |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf  | 0         | 0         | 0         | 0         |           | 0          |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge  | 0         | 0         | 0         | 0         |           | 0          |
| <b>6 Total.</b> Add lines 1 through 5   | 3,394,949 | 2,992,092 | 2,875,143 | 2,685,264 | 3,510,926 | 15,458,374 |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons  | 0         | 0         | 0         | 0         |           | 0          |
| <b>b</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         | 0         | 0         | 0         |           | 0          |
| <b>c</b> Add lines 7a and 7b.   | 0         | 0         | 0         | 0         | 0         | 0          |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)  |           |           |           |           |           | 15,458,374 |

**Section B. Total Support**

| Calendar year<br>(or fiscal year beginning in) ▶  | (a) 2019  | (b) 2020  | (c) 2021  | (d) 2022  | (e) 2023  | (f) Total  |
|---|-----------|-----------|-----------|-----------|-----------|------------|
| <b>9</b> Amounts from line 6.   | 3,394,949 | 2,992,092 | 2,875,143 | 2,685,264 | 3,510,926 | 15,458,374 |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | 385,602   | 529,624   | 387,098   | 516,521   | 516,521   | 2,335,366  |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.                         | 0         | 0         |           |           |           | 0          |
| <b>c</b> Add lines 10a and 10b.   | 385,602   | 529,624   | 387,098   | 516,521   | 516,521   | 2,335,366  |
| <b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.    | 0         | 0         |           |           |           | 0          |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)                                 | 122,480   | 156,427   | 151,033   | 163,175   | 169,396   | 762,511    |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)  | 3,903,031 | 3,678,143 | 3,413,274 | 3,364,960 | 4,196,843 | 18,556,251 |

**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**

|  |           |          |
|--|-----------|----------|
| <b>15</b> Public support percentage for 2023 (line 8, column (f) divided by line 13, column (f)) | <b>15</b> | 83.305 % |
| <b>16</b> Public support percentage from 2022 Schedule A, Part III, line 15                      | <b>16</b> | 82.935 % |

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

|  |           |          |
|--|-----------|----------|
| <b>17</b> Investment income percentage for <b>2023</b> (line 10c, column (f) divided by line 13, column (f)) | <b>17</b> | 12.585 % |
| <b>18</b> Investment income percentage from <b>2022</b> Schedule A, Part III, line 17                        | <b>18</b> | 12.644 % |

**19a 33 1/3% support tests—2023.** 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—2022.** 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 |
|------------|---|-----|----|
| <b>1</b>   | Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>   |     |    |
| <b>2</b>   | Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>  |     |    |
| <b>3a</b>  | 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>b</b>   | Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.</i>  |     |    |
| <b>c</b>   | 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 <b>Part VI</b> what controls the organization put in place to ensure such use.</i>   |     |    |
| <b>4a</b>  | 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>b</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 <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>   |     |    |
| <b>c</b>   | Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>  |     |    |
| <b>5a</b>  | 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 <b>Part VI</b>, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i> |     |    |
| <b>b</b>   | <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?  |     |    |
| <b>c</b>   | <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?   |     |    |
| <b>6</b>   | Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (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 <b>Part VI</b>.</i>   |     |    |
| <b>7</b>   | 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>  |     |    |
| <b>8</b>   | 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>  |     |    |
| <b>9a</b>  | Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in <b>Part VI</b>.</i>   |     |    |
| <b>b</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 <b>Part VI</b>.</i>   |     |    |
| <b>c</b>   | 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 <b>Part VI</b>.</i>  |     |    |
| <b>10a</b> | 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>b</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 |
|-----------|---|-----|----|
| <b>11</b> | Has the organization accepted a gift or contribution from any of the following persons?   |     |    |
| <b>a</b>  | 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>b</b>  | A family member of a person described on 11a above?   |     |    |
| <b>c</b>  | 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 |
|----------|--|-----|----|
| <b>1</b> | 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> |     |    |
| <b>2</b> | 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 |
|----------|---|-----|----|
| <b>1</b> | 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 |
|----------|--|-----|----|
| <b>1</b> | 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? |     |    |
| <b>2</b> | 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>  |     |    |
| <b>3</b> | 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**

|          |  |  |  |
|----------|--|--|--|
| <b>1</b> | Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):  |  |  |
| <b>a</b> | <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.  |  |  |
| <b>b</b> | <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.   |  |  |
| <b>c</b> | <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions)  |  |  |
| <b>2</b> | Activities Test. <b>Answer lines 2a and 2b below.</b>  |  |  |
| <b>a</b> | 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>b</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>   |  |  |
| <b>3</b> | Parent of Supported Organizations. <b>Answer lines 3a and 3b below.</b>  |  |  |
| <b>a</b> | 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>b</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.

| <b>Section A - Adjusted Net Income</b>  |  | (A) Prior Year | (B) Current Year<br>(optional) |
|---|--|----------------|--------------------------------|
| <b>1</b>                                | Net short-term capital gain  | <b>1</b>       |                                |
| <b>2</b>                                | Recoveries of prior-year distributions   | <b>2</b>       |                                |
| <b>3</b>                                | Other gross income (see instructions)  | <b>3</b>       |                                |
| <b>4</b>                                | Add lines 1 through 3  | <b>4</b>       |                                |
| <b>5</b>                                | Depreciation and depletion   | <b>5</b>       |                                |
| <b>6</b>                                | 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) | <b>6</b>       |                                |
| <b>7</b>                                | Other expenses (see instructions)  | <b>7</b>       |                                |
| <b>8</b>                                | <b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)   | <b>8</b>       |                                |
| <b>Section B - Minimum Asset Amount</b> |  | (A) Prior Year | (B) Current Year<br>(optional) |
| <b>1</b>                                | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):  | <b>1</b>       |                                |
| <b>a</b>                                | Average monthly value of securities  | <b>1a</b>      |                                |
| <b>b</b>                                | Average monthly cash balances  | <b>1b</b>      |                                |
| <b>c</b>                                | Fair market value of other non-exempt-use assets   | <b>1c</b>      |                                |
| <b>d</b>                                | <b>Total</b> (add lines 1a, 1b, and 1c)  | <b>1d</b>      |                                |
| <b>e</b>                                | <b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):   |                |                                |
| <b>2</b>                                | Acquisition indebtedness applicable to non-exempt use assets   | <b>2</b>       |                                |
| <b>3</b>                                | Subtract line 2 from line 1d   | <b>3</b>       |                                |
| <b>4</b>                                | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).   | <b>4</b>       |                                |
| <b>5</b>                                | Net value of non-exempt-use assets (subtract line 4 from line 3)   | <b>5</b>       |                                |
| <b>6</b>                                | Multiply line 5 by 0.035   | <b>6</b>       |                                |
| <b>7</b>                                | Recoveries of prior-year distributions   | <b>7</b>       |                                |
| <b>8</b>                                | <b>Minimum Asset Amount</b> (add line 7 to line 6)   | <b>8</b>       |                                |
| <b>Section C - Distributable Amount</b> |  |                | Current Year                   |
| <b>1</b>                                | Adjusted net income for prior year (from Section A, line 8, Column A)  | <b>1</b>       |                                |
| <b>2</b>                                | Enter 85% of line 1  | <b>2</b>       |                                |
| <b>3</b>                                | Minimum asset amount for prior year (from Section B, line 8, Column A)   | <b>3</b>       |                                |
| <b>4</b>                                | Enter greater of line 2 or line 3  | <b>4</b>       |                                |
| <b>5</b>                                | Income tax imposed in prior year   | <b>5</b>       |                                |
| <b>6</b>                                | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)   | <b>6</b>       |                                |
| <b>7</b>                                | <input type="checkbox"/> 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)

| <b>Section D - Distributions</b>  |           | <b>Current Year</b> |
|---|-----------|---------------------|
| <b>1</b> Amounts paid to supported organizations to accomplish exempt purposes  | <b>1</b>  |                     |
| <b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity              | <b>2</b>  |                     |
| <b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations  | <b>3</b>  |                     |
| <b>4</b> Amounts paid to acquire exempt-use assets  | <b>4</b>  |                     |
| <b>5</b> Qualified set-aside amounts ( <i>prior IRS approval required - provide details in Part VI</i> )  | <b>5</b>  |                     |
| <b>6</b> Other distributions ( <i>describe in Part VI</i> ). See instructions   | <b>6</b>  |                     |
| <b>7 Total annual distributions.</b> Add lines 1 through 6.   | <b>7</b>  |                     |
| <b>8</b> Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions | <b>8</b>  |                     |
| <b>9</b> Distributable amount for 2023 from Section C, line 6   | <b>9</b>  |                     |
| <b>10</b> Line 8 amount divided by Line 9 amount  | <b>10</b> |                     |

| <b>Section E - Distribution Allocations</b><br>(see instructions)  | <b>(i)</b><br><b>Excess Distributions</b> | <b>(ii)</b><br><b>Underdistributions</b><br><b>Pre-2023</b> | <b>(iii)</b><br><b>Distributable</b><br><b>Amount for 2023</b> |
|--|---|---|--|
| <b>1</b> Distributable amount for 2023 from Section C, line 6  |   |   |  |
| <b>2</b> Underdistributions, if any, for years prior to 2023 (reasonable cause required-- <i>explain in Part VI</i> ). See instructions.   |   |   |  |
| <b>3</b> Excess distributions carryover, if any, to 2023:  |   |   |  |
| <b>a</b> From 2018. . . . .  |   |   |  |
| <b>b</b> From 2019. . . . .  |   |   |  |
| <b>c</b> From 2020. . . . .  |   |   |  |
| <b>d</b> From 2021. . . . .  |   |   |  |
| <b>e</b> From 2022. . . . .  |   |   |  |
| <b>f Total</b> of lines 3a through e   |   |   |  |
| <b>g</b> Applied to underdistributions of prior years  |   |   |  |
| <b>h</b> Applied to 2023 distributable amount  |   |   |  |
| <b>i</b> Carryover from 2018 not applied (see instructions)  |   |   |  |
| <b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.  |   |   |  |
| <b>4</b> Distributions for 2023 from Section D, line 7:  |   |   |  |
| \$   |   |   |  |
| <b>a</b> Applied to underdistributions of prior years  |   |   |  |
| <b>b</b> Applied to 2023 distributable amount  |   |   |  |
| <b>c</b> Remainder. Subtract lines 4a and 4b from line 4.  |   |   |  |
| <b>5</b> Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions. |   |   |  |
| <b>6</b> Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.                        |   |   |  |
| <b>7 Excess distributions carryover to 2024.</b> Add lines 3j and 4c.  |   |   |  |
| <b>8</b> Breakdown of line 7:  |   |   |  |
| <b>a</b> Excess from 2019. . . . .   |   |   |  |
| <b>b</b> Excess from 2020. . . . .   |   |   |  |
| <b>c</b> Excess from 2021. . . . .   |   |   |  |
| <b>d</b> Excess from 2022. . . . .   |   |   |  |
| <b>e</b> Excess from 2023. . . . .   |   |   |  |

**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).

|                                     |
|-------------------------------------|
| <b>Facts And Circumstances Test</b> |
|                                     |

**990 Schedule A, Supplemental Information**

| Return Reference              | Explanation   |
|-------------------------------|---|
| Schedule A, Part III, Line 12 | Schedule A, Part III, Line 12 - Gross sales of inventory less returns and allowances. |

**SCHEDULE D**  
(Form 990)  
  
Department of the Treasury  
Internal Revenue Service

# Supplemental Financial Statements

OMB No. 1545-0047  
**2023**  
**Open to Public Inspection**

▶ **Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **Attach to Form 990.**  
▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**Name of the organization**  
THE TAU BETA PI ASSOCIATION INC

**Employer identification number**  
62-0479545

**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 |
|--|-------------------------|------------------------------|
| <b>1</b> Total number at end of year . . . . .             |                         |                              |
| <b>2</b> Aggregate value of contributions to (during year) |                         |                              |
| <b>3</b> Aggregate value of grants from (during year)      |                         |                              |
| <b>4</b> 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.

|   | Held at the End of the Year |
|---|-----------------------------|
| <b>a</b> Total number of conservation easements . . . . .   | <b>2a</b>                   |
| <b>b</b> Total acreage restricted by conservation easements . . . . .   | <b>2b</b>                   |
| <b>c</b> Number of conservation easements on a certified historic structure included in (a) . . . . .   | <b>2c</b>                   |
| <b>d</b> Number of conservation easements included in (c) acquired after July 25, 2006, and not on a historic structure listed in the National Register . . . . . | <b>2d</b>                   |

- 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 |
|---|--------|
| <b>1c</b> Beginning balance . . . . .             |        |
| <b>1d</b> Additions during the year . . . . .     |        |
| <b>1e</b> Distributions during the year . . . . . |        |
| <b>1f</b> Ending balance . . . . .                |        |
- 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 |
|---|------------------|----------------|--------------------|----------------------|---------------------|
| <b>1a</b> Beginning of year balance . . . . .                     | 38,507,191       | 35,232,879     | 39,957,610         | 29,916,105           | 27,706,278          |
| <b>b</b> Contributions . . . . .                                  | 2,019,529        | 1,108,735      | 1,199,497          | 1,243,231            | 1,797,764           |
| <b>c</b> Net investment earnings, gains, and losses               | 4,518,323        | 4,042,093      | -4,867,989         | 9,860,707            | 1,941,353           |
| <b>d</b> Grants or scholarships . . . . .                         | 800,450          | 847,900        | 804,000            | 781,450              | 855,345             |
| <b>e</b> Other expenditures for facilities and programs . . . . . | 1,116,951        | 960,785        | 202,462            | 256,872              | 656,749             |
| <b>f</b> Administrative expenses . . . . .                        | 72,394           | 67,831         | 49,777             | 24,111               | 17,196              |
| <b>g</b> End of year balance . . . . .                            | 43,055,248       | 38,507,191     | 35,232,879         | 39,957,610           | 29,916,105          |

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment ▶ 51.4 %
  - b** Permanent endowment ▶ 46.8 %
  - c** Term endowment ▶ 1.8 %
- 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:
- |  | Yes | No |
|--|-----|----|
| <b>(i)</b> Unrelated organizations . . . . .   | Yes | No |
| <b>(ii)</b> Related organizations . . . . .  | No  | No |
| <b>b</b> If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . . |     |    |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

**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 |
|--|--------------------------------------|---------------------------------|------------------------------|----------------|
| <b>1a</b> Land . . . . .   | 0                                    | 0                               | 0                            | 0              |
| <b>b</b> Buildings . . . . .   | 0                                    | 0                               | 0                            | 0              |
| <b>c</b> Leasehold improvements  | 0                                    | 0                               | 0                            | 0              |
| <b>d</b> Equipment . . . . .   | 0                                    | 206,116                         | 118,691                      | 87,425         |
| <b>e</b> Other . . . . .   | 0                                    | 0                               | 0                            | 0              |
| <b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶ |                                      |                                 |                              | 87,425         |

**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<br>(including name of security)   | (b) Book value | (c) Method of valuation:<br>Cost or end-of-year market value |
|---|----------------|--|
| (1) Financial derivatives . . . . .                                       |                |  |
| (2) Closely-held equity interests . . . . .                               |                |  |
| (3) Other _____   |                |  |
| (A)   |                |  |
| (C)   |                |  |
| (C)   |                |  |
| (D)   |                |  |
| (E)   |                |  |
| (F)   |                |  |
| (G)   |                |  |
| (H)   |                |  |
| <b>Total.</b> (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:<br>Cost or end-of-year market value |
|--|----------------|--|
| (1)  |                |  |
| (2)  |                |  |
| (3)  |                |  |
| (4)  |                |  |
| (5)  |                |  |
| (6)  |                |  |
| (7)  |                |  |
| (8)  |                |  |
| (9)  |                |  |
| (9)  |                |  |
| <b>Total.</b> (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)  |                |
| (9)  |                |
| <b>Total.</b> (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   | 0              |
| Life Subscriptions to The Bent Publication                               | 957,191        |
|  |                |
|  |                |
|  |                |
|  |                |
|  |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col.(B) line 25.) | ▶ 957,191      |

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

**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.

|          |  |           |           |                     |
|----------|--|-----------|-----------|---------------------|
| <b>1</b> | Total revenue, gains, and other support per audited financial statements . . . . .                       |           | <b>1</b>  | 8,367,265           |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part VIII, line 12:                                      |           |           |                     |
| <b>a</b> | Net unrealized gains (losses) on investments . . . . .   | <b>2a</b> | 3,203,688 |                     |
| <b>b</b> | Donated services and use of facilities . . . . .   | <b>2b</b> | 39,121    |                     |
| <b>c</b> | Recoveries of prior year grants . . . . .  | <b>2c</b> | 0         |                     |
| <b>d</b> | Other (Describe in Part XIII.) . . . . .   | <b>2d</b> | 122,378   |                     |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .  |           |           | <b>2e</b> 3,365,187 |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .   |           |           | <b>3</b> 5,002,078  |
| <b>4</b> | Amounts included on Form 990, Part VIII, line 12, but not on line <b>1</b> :                             |           |           |                     |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                               | <b>4a</b> | 0         |                     |
| <b>b</b> | Other (Describe in Part XIII.) . . . . .   | <b>4b</b> | 0         |                     |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .  |           |           | <b>4c</b> 0         |
| <b>5</b> | Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) . . . . . |           |           | <b>5</b> 5,002,078  |

**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.

|          |   |           |          |                    |
|----------|---|-----------|----------|--------------------|
| <b>1</b> | Total expenses and losses per audited financial statements . . . . .                                      |           | <b>1</b> | 3,951,893          |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part IX, line 25:   |           |          |                    |
| <b>a</b> | Donated services and use of facilities . . . . .  | <b>2a</b> | 0        |                    |
| <b>b</b> | Prior year adjustments . . . . .  | <b>2b</b> | 0        |                    |
| <b>c</b> | Other losses . . . . .  | <b>2c</b> | 0        |                    |
| <b>d</b> | Other (Describe in Part XIII.) . . . . .  | <b>2d</b> | 122,379  |                    |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .   |           |          | <b>2e</b> 122,379  |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .  |           |          | <b>3</b> 3,829,514 |
| <b>4</b> | Amounts included on Form 990, Part IX, line 25, but not on line <b>1</b> :                                |           |          |                    |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                                | <b>4a</b> | 0        |                    |
| <b>b</b> | Other (Describe in Part XIII.) . . . . .  | <b>4b</b> | 0        |                    |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .   |           |          | <b>4c</b> 0        |
| <b>5</b> | Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) . . . . . |           |          | <b>5</b> 3,829,514 |

**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 |
|---------------------------|-------------|
| See Additional Data Table |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |

**Part XIII** Supplemental Information *(continued)*

| Return Reference | Explanation |
|------------------|-------------|
|                  |             |
|                  |             |
|                  |             |
|                  |             |
|                  |             |
|                  |             |
|                  |             |
|                  |             |
|                  |             |
|                  |             |

## Additional Data

**Software ID:** 23018249

**Software Version:** v1.00

**EIN:** 62-0479545

**Name:** THE TAU BETA PI ASSOCIATION INC

## Supplemental Information

| Return Reference           | Explanation  |
|----------------------------|--|
| Schedule D, Part V, Line 4 | Endowment funds are used for undergraduate scholarships and graduate fellowships, annual Convention attendance by students, magazine publication, and programs such as MindSET, Greater Interest in Government, professional development, and Engineering Futures. |

## Supplemental Information

| Return Reference             | Explanation  |
|------------------------------|--|
| Schedule D, Part XI, Line 2d | Part XI, Line 2d: Cost of goods sold during tax year 2023; trustee fees reported as negative revenue rounding difference (\$10) between audit and prepared financial statements. |

## Supplemental Information

| Return Reference              | Explanation   |
|-------------------------------|---|
| Schedule D, Part XII, Line 2d | Part XII, Line 2d: Cost of goods sold during tax year 2023; trustee fees reported as negative revenue and not an expense. |

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule I (Form 990)

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 the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Name of the organization THE TAU BETA PI ASSOCIATION INC

Employer identification number 62-0479545

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?
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.

Table with 8 columns: (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. Row 1: (1) SAE, 400 Commonwealth Drive, Warrendale, PA 15096; EIN 25-1494402; IRC section 501(c)(3); Amount 9,450; Non-cash 0; Method N/A; Description N/A; Purpose Engineering scholarships for freshman college students.

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 1
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) Graduate Fellowships        | 30                       | 10,000                   | 0                                | N/A   |                                       |
| (2) Undergraduate Scholarships  | 15                       | 1,000                    | 0                                | N/A   |                                       |
| (3) Undergraduate Scholarships  | 238                      | 2,000                    | 0                                | N/A   |                                       |
| (4) Chapter Scholarships        | 8                        | 500                      | 0                                | N/A   |                                       |
| (5) Laureates                   | 4                        | 2,500                    | 0                                | N/A   |                                       |
| (6) Alumnus Recognition Awards  | 2                        | 1,000                    | 0                                | N/A   |                                       |
| (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 |
|---------------------|-------------|
| See Additional Data |             |

## Additional Data

**Software ID:** 23018249

**Software Version:** v1.00

**EIN:** 62-0479545

**Name:** THE TAU BETA PI ASSOCIATION INC

## Additional Data Form 990, Schedule I Part IV - Supplemental Information

| Return Reference           | Explanation   |
|----------------------------|---|
| Schedule I, Part I, Line 2 | Grant funds are given to recipients who are members of Tau Beta Pi. Recipients are chosen by committees or boards named by the Executive Council (Board of Directors). Monetary grants are issued directly to members, chapters or schools in the United States. Certain grants require annual reports by recipients, and IRS forms are filed for recipients who receive grants where the funds can be considered income. |

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2023**

- ▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
- ▶ **Attach to Form 990.**
- ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization  
THE TAU BETA PI ASSOCIATION INC

Employer identification number  
62-0479545

**Part I Types of Property**

|   | (a)<br>Check if applicable | (b)<br>Number of contributions or items contributed | (c)<br>Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d)<br>Method of determining noncash contribution amounts |
|---|----------------------------|---|--|---|
| <b>1</b> Art—Works of art . . . . .   |                            |   |  |   |
| <b>2</b> Art—Historical treasures . . . . .                                 |                            |   |  |   |
| <b>3</b> Art—Fractional interests . . . . .                                 |                            |   |  |   |
| <b>4</b> Books and publications . . . . .                                   |                            |   |  |   |
| <b>5</b> Clothing and household goods . . . . .                             |                            |   |  |   |
| <b>6</b> Cars and other vehicles . . . . .                                  |                            |   |  |   |
| <b>7</b> Boats and planes . . . . .   |                            |   |  |   |
| <b>8</b> Intellectual property . . . . .                                    |                            |   |  |   |
| <b>9</b> Securities—Publicly traded . . . . .                               | X                          | 4   | 36,006   | Market Value  |
| <b>10</b> Securities—Closely held stock . . . . .                           |                            |   |  |   |
| <b>11</b> Securities—Partnership, LLC, or trust interests . . . . .         |                            |   |  |   |
| <b>12</b> Securities—Miscellaneous . . . . .                                |                            |   |  |   |
| <b>13</b> Qualified conservation contribution—Historic structures . . . . . |                            |   |  |   |
| <b>14</b> Qualified conservation contribution—Other . . . . .               |                            |   |  |   |
| <b>15</b> Real estate—Residential . . . . .                                 |                            |   |  |   |
| <b>16</b> Real estate—Commercial . . . . .                                  |                            |   |  |   |
| <b>17</b> Real estate—Other . . . . .                                       |                            |   |  |   |
| <b>18</b> Collectibles . . . . .  |                            |   |  |   |
| <b>19</b> Food inventory . . . . .  |                            |   |  |   |
| <b>20</b> Drugs and medical supplies . . . . .                              |                            |   |  |   |
| <b>21</b> Taxidermy . . . . .   |                            |   |  |   |
| <b>22</b> Historical artifacts . . . . .                                    |                            |   |  |   |
| <b>23</b> Scientific specimens . . . . .                                    |                            |   |  |   |
| <b>24</b> Archeological artifacts . . . . .                                 |                            |   |  |   |
| <b>25</b> Other ▶ ( _____ )   |                            |   |  |   |
| <b>26</b> Other ▶ ( _____ )   |                            |   |  |   |
| <b>27</b> Other ▶ ( _____ )   |                            |   |  |   |
| <b>28</b> Other ▶ ( _____ )   |                            |   |  |   |

**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

|  | Yes | No |
|--|-----|----|
| <b>30a</b> 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? . . . . . |     | No |
| <b>b</b> If "Yes," describe the arrangement in Part II.  |     |    |
| <b>31</b> Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?   | Yes |    |
| <b>32a</b> Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? . . . . .  |     | No |
| <b>b</b> If "Yes," describe in Part II.  |     |    |
| <b>33</b> 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 |
|------------------|-------------|
|------------------|-------------|

**SCHEDULE O**  
**(Form 990)**Department of the Treasury  
Internal Revenue Service**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

Attach to Form 990 or 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023****Open to Public  
Inspection**Name of the organization  
THE TAU BETA PI ASSOCIATION INC

Employer identification number

62-0479545

**990 Schedule O, Supplemental Information**

| Return Reference                              | Explanation  |
|---|--|
| Form 990,<br>Part VI,<br>Section A,<br>Line 6 | The Association has members. Delegates to the Convention elect three members of the governing body (Executive Council) each year for three-year terms. The Board has nine voting members, and its decisions are subject to review by the Convention. |

## 990 Schedule O, Supplemental Information

| Return Reference                      | Explanation  |
|---------------------------------------|--|
| Form 990, Part VI, Section A, Line 7a | The Association has members. Delegates to the Convention elect three members of the governing body (Executive Council) each year for three-year terms. The Board has nine voting members, and its decisions are subject to review by the Convention. |

## 990 Schedule O, Supplemental Information

| Return Reference                      | Explanation  |
|---------------------------------------|--|
| Form 990, Part VI, Section A, Line 7b | The Association has members. Delegates to the Convention elect three members of the governing body (Executive Council) each year for three-year terms. The Board has nine voting members, and its decisions are subject to review by the Convention. |

## 990 Schedule O, Supplemental Information

| Return Reference                       | Explanation   |
|--|---|
| Form 990, Part VI, Section B, Line 11b | The 990 is prepared by the Director of Finance and Operations and reviewed and approved by the Executive Director. The Executive Council (governing body) received a copy prior to filing and is reviewed by the Audit Committee. |

## 990 Schedule O, Supplemental Information

| Return Reference                       | Explanation  |
|--|--|
| Form 990, Part VI, Section B, Line 12c | The signed disclosures are maintained by the Executive Council in the office of the Executive Director. Each individual subject to the conflict of interest policy must update their record annually. Any conflicts are reviewed by the Executive Council. |

**990 Schedule O, Supplemental Information**

| <b>Return Reference</b>               | <b>Explanation</b>   |
|---------------------------------------|--|
| Form 990, Part VI, Section B, Line 15 | The salary program is reviewed periodically by a national compensation consultant who compares Tau Beta Pi salaries with data reported by similar organizations. Salaries are indexed periodically by the CPI-W. Recommendations are made annually by the Executive Director for all other employees. The Executive Council approves the compensation for the Executive Director and the budget for compensation of other employees. |

## 990 Schedule O, Supplemental Information

| Return Reference                      | Explanation  |
|---------------------------------------|--|
| Form 990, Part VI, Section C, Line 19 | <p>The Constitution &amp; Bylaws, financial statements, and 990 are published at <a href="http://www.tbp.org">www.tbp.org</a>. The conflict of interest policy is published internally on our Association Officials website.</p> <p>Financial statements and the Executive Director's annual report are published each Fall in our quarterly magazine, The Bent.</p> |