

Return of Organization Exempt From Income Tax

2008

Department of the Treasury
Internal Revenue Service

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

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

Open to Public Inspection

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

| | | | |
|--|---|---|--|
| B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending | Please use IRS label or print or type. See specific instructions. | C Name of organization The Monroe Institute Number and street (or P.O. box if mail is not delivered to street addr) Room/suite 365 Roberts Mountain Road City, town or country State ZIP code + 4 Faber VA 22938 | D Employer Identification Number 54-1824173 E Telephone number (434) 361-1252 G Gross receipts \$ 2,727,244. |
| F Name and address of principal officer: Frederick H. Atw 365 Roberts Mountain R Faber VA 22938 | | H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If 'No,' attach a list. (see instructions) | H(c) Group exemption number ▶ |
| I Tax-exempt status <input checked="" type="checkbox"/> 501(c) (3) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527 | | J Website: ▶ N/A | |
| K Type of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶ | | L Year of Formation: 1985 | M State of legal domicile: VA |

Part I Summary

| | | | | |
|---|--|--|-------------------|--|
| | 1 Briefly describe the organization's mission or most significant activities: <u>Education and Research</u> | | | |
| Activities & Governance | 2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets. | | | |
| | 3 Number of voting members of the governing body (Part VI, line 1a) | 3 | 8 | |
| | 4 Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 5 | |
| | 5 Total number of employees (Part V, line 2a) | 5 | 23 | |
| | 6 Total number of volunteers (estimate if necessary) | 6 | 0 | |
| | 7a Total gross unrelated business revenue from Part VIII, line 12, column (C) | 7a | 0. | |
| b Net unrelated business taxable income from Form 990-T, line 34 | 7b | | | |
| Revenue | 8 Contributions and grants (Part VIII, line 1h) | 84,401. | 140,717. | |
| | 9 Program service revenue (Part VIII, line 2g) | 2,081,294. | 2,556,747. | |
| | 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) | 45,363. | 14,804. | |
| | 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 20,106. | 14,976. | |
| | 12 Total revenue – add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 2,231,164. | 2,727,244. | |
| | Expenses | 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) | | |
| 14 Benefits paid to or for members (Part IX, column (A), line 4) | | | | |
| 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | | 737,279. | 876,700. | |
| 16a Professional fundraising fees (Part IX, column (A), line 11e) | | | | |
| b Total fundraising expenses (Part IX, column (D), line 25) ▶ | | 0. | | |
| 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) | | 1,257,684. | 1,658,491. | |
| 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | 1,994,963. | 2,535,191. | | |
| 19 Revenue less expenses. Subtract line 18 from line 12 | 236,201. | 192,053. | | |
| Net Assets or Fund Balances | 20 Total assets (Part X, line 16) | 3,084,963. | 3,219,182. | |
| | 21 Total liabilities (Part X, line 26) | 603,279. | 532,439. | |
| | 22 Net assets or fund balances. Subtract line 21 from line 20 | 2,481,684. | 2,686,743. | |

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 | 08/12/09 Date | | |
| | Frederick H. Atwater Type or print name and title. | Frederick H. Atwater | | |
| Paid Preparer's Use Only | Preparer's signature ▶ Mike Kunkel | 08/12/09 Date | Check if self-employed <input type="checkbox"/> Preparer's identifying number (see instructions) | |
| | Firm's name (or yours if self-employed), address, and ZIP + 4 ACCOUNTING CONSULTANTS, INC. 2771 ROCKFISH VALLEY HWY P O BOX 436 NELLYSFORD VA 22958-2309 | EIN ▶ | Phone no. ▶ (434) 361-9080 | |
| | May the IRS discuss this return with the preparer shown above? (see instructions) | | | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |

Part III Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission:

Education and Research

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 exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts 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 \$ 2,248,272. including grants of \$ 0.) (Revenue \$ 2,727,244.)

Education, training & research in stress reduction, personal development & accelerated learning techniques. More than 1,000 people were served. College scholarships were awarded to several local students. Donations made to a number of nonprofit organizations.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

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

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses \$ 2,248,272. (Must equal Part IX, Line 25, column (B).)

Part IV Checklist of Required Schedules

| | Yes | No | |
|--|-----|----|---|
| 1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If 'Yes,' complete Schedule A</i> | 1 | X | |
| 2 Is the organization required to complete Schedule B, Schedule of Contributors? | 2 | | X |
| 3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If 'Yes,' complete Schedule C, Part I</i> | 3 | | X |
| 4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If 'Yes,' complete Schedule C, Part II</i> | 4 | | X |
| 5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If 'Yes,' complete Schedule C, Part III</i> | 5 | | |
| 6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If 'Yes,' complete Schedule D, Part I</i> | 6 | | X |
| 7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? <i>If 'Yes,' complete Schedule D, Part II</i> | 7 | | X |
| 8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If 'Yes,' complete Schedule D, Part III</i> | 8 | | X |
| 9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If 'Yes,' complete Schedule D, Part IV</i> | 9 | | X |
| 10 Did the organization hold assets in term, permanent, or quasi-endowments? <i>If 'Yes,' complete Schedule D, Part V</i> | 10 | | X |
| 11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If 'Yes,' complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i> | 11 | X | |
| 12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If 'Yes,' complete Schedule D, Parts XI, XII, and XIII</i> | 12 | | X |
| 13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If 'Yes,' complete Schedule E</i> | 13 | X | |
| 14a Did the organization maintain an office, employees, or agents outside of the U.S.? | 14a | | X |
| b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? <i>If 'Yes,' complete Schedule F, Part I</i> | 14b | | X |
| 15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If 'Yes,' complete Schedule F, Part II</i> | 15 | | X |
| 16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If 'Yes,' complete Schedule F, Part III</i> | 16 | | X |
| 17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If 'Yes,' complete Schedule G, Part I</i> | 17 | | X |
| 18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If 'Yes,' complete Schedule G, Part II</i> | 18 | | X |
| 19 Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If 'Yes,' complete Schedule G, Part III</i> | 19 | | X |
| 20 Did the organization operate one or more hospitals? <i>If 'Yes,' complete Schedule H</i> | 20 | | X |
| 21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i> | 21 | | X |
| 22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i> | 22 | | X |
| 23 Did the organization answer 'Yes' to Part VII, Section A, questions 3, 4, or 5? <i>If 'Yes,' complete Schedule J</i> | 23 | | X |
| 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? <i>If 'Yes,' answer questions 24b-24d and complete Schedule K. If 'No,' go to question 25</i> | 24a | | X |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? | 24c | | |
| d Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year? | 24d | | |
| 25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i> | 25a | | X |
| b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If 'Yes,' complete Schedule L, Part I</i> | 25b | | X |
| 26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If 'Yes,' complete Schedule L, Part II</i> | 26 | | X |
| 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If 'Yes,' complete Schedule L, Part III</i> | 27 | | X |

Part IV Checklist of Required Schedules (continued)

| | Yes | No |
|---|------------|----|
| 28 During the tax year, did any person who is a current or former officer, director, trustee, or key employee: | | |
| a Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? <i>If 'Yes,' complete Schedule L, Part IV</i> | 28a | X |
| b Have a family member who had a direct or indirect business relationship with the organization? <i>If 'Yes,' complete Schedule L, Part IV</i> | 28b | X |
| c Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If 'Yes,' complete Schedule L, Part IV</i> | 28c | X |
| 29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i> | 29 | X |
| 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i> | 30 | X |
| 31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i> | 31 | X |
| 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i> | 32 | X |
| 33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i> | 33 | X |
| 34 Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i> | 34 | X |
| 35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i> | 35 | X |
| 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i> | 36 | X |
| 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i> | 37 | X |

BAA

Form 990 (2008)

Part V Statements Regarding Other IRS Filings and Tax Compliance

| | | Yes | No |
|------------|--|-----|----|
| 1a | Enter the number reported in Box 3 of form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable | | |
| 1a | 0 | | |
| 1b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable | | |
| 1b | 0 | | |
| 1c | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? | X | |
| 2a | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return | | |
| 2a | 23 | | |
| 2b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions) | X | |
| 3a | Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return? | | X |
| 3b | If 'Yes' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O | | |
| 4a | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | | X |
| 4a | | | |
| 4b | If 'Yes,' enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1 , Report of Foreign Bank and Financial Accounts. | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | | X |
| 5b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | X |
| 5c | If 'Yes,' to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction? | | |
| 6a | Did the organization solicit any contributions that were not tax deductible? | | X |
| 6b | If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not deductible? | | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | | |
| 7a | Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75? | | X |
| 7b | If 'Yes,' did the organization notify the donor of the value of the goods or services provided? | | |
| 7c | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | | X |
| 7c | | | |
| 7d | If 'Yes,' indicate the number of Forms 8282 filed during the year | | |
| 7d | | | |
| 7e | Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | | X |
| 7f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | X |
| 7g | For all contributions of qualified intellectual property, did the organization file Form 8899 as required? | | |
| 7h | For all contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required? | | |
| 8 | Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | | X |
| 9 | Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds. | | |
| 9a | Did the organization make any taxable distributions under section 4966? | | X |
| 9b | Did the organization make any distribution to a donor, donor advisor, or related person? | | X |
| 10 | Section 501(c)(7) organizations. Enter: | | |
| 10a | Initiation fees and capital contributions included on Part VIII, line 12 | | |
| 10b | Gross Receipts, included on Form 990, Part VIII, line 12, for public use of club facilities | | |
| 11 | Section 501(c)(12) organizations. Enter: | | |
| 11a | Gross income from other members or shareholders | | |
| 11b | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) | | |
| 12a | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? | | |
| 12a | | | |
| 12b | If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year | | |
| 12b | | | |

Part VI Governance, Management and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

Section A. Governing Body and Management

| | | Yes | No |
|--|---|-----|----|
| <i>For each 'Yes' response to lines 2-7b below, and for a 'No' response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.</i> | | | |
| 1a | Enter the number of voting members of the governing body | | |
| 1b | Enter the number of voting members that are independent | | |
| 2 | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee? | | X |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? | | X |
| 4 | Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed? | | X |
| 5 | Did the organization become aware during the year of a material diversion of the organization's assets? | | X |
| 6 | Does the organization have members or stockholders? | | X |
| 7a | Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body? | | X |
| 7b | Are any decisions of the governing body subject to approval by members, stockholders, or other persons? | | X |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | |
| 8a | The governing body? | X | |
| 8b | Each committee with authority to act on behalf of the governing body? | X | |
| 9a | Does the organization have local chapters, branches, or affiliates? | | X |
| 9b | If 'Yes,' does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization? | | |
| 10 | Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990 | X | |
| 11 | Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O | | X |

Section B. Policies

| | | Yes | No |
|------------|--|-----|----|
| 12a | Does the organization have a written conflict of interest policy? If 'No,' go to line 13 | X | |
| 12b | Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | X | |
| 12c | Does the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this is done | X | |
| 13 | Does the organization have a written whistleblower policy? | | X |
| 14 | Does the organization have a written document retention and destruction policy? | | X |
| 15 | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision: | | |
| 15a | The organization's CEO, Executive Director, or top management official? | X | |
| 15b | Other officers of key employees of the organization? Describe the process in Schedule O. (see instructions) | X | |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? | | X |
| 16b | If 'Yes,' has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? | | |

Section C. Disclosures

- 17** List the states with which a copy of this Form 990 is required to be filed ► Virginia
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
 Own website Another's website Upon request
- 19** Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.
- 20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization:
 ► Accounting Consultants, Inc. 2771 Rockfish Valley Hwy Nellysford VA 22958 (434) 361-9080

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1 a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

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

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

Check this box if the organization did not compensate any officer, director, trustee, or key employee.

| (A) Name and Title | (B) Average hours per week | (C) Position (check all that apply) | | | | | | (D) Reportable compensation from the organization (W-2/1099-MISC) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|--------------------------------------|-------------------------------|--|-----------------------|---------|--------------|------------------------------|---------|--|---|---|
| | | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| Dr. Al Dahlberg Director | 0.00 | X | | | | | 0. | 0. | 0. | |
| Skip Atwater President/Treasurer | 40.00 | X | | X | | | 77,820. | 0. | 0. | |
| Dr. Brian Dailey Director | 0.00 | X | | | | | 0. | 0. | 0. | |
| George Griffith Chairman | 0.00 | X | | | | | 0. | 0. | 0. | |
| Dr. Darlene Miller Vice President | 40.00 | X | | X | | | 61,995. | 0. | 0. | |
| Virginia Colburn Director | 0.00 | X | | | | | 0. | 0. | 0. | |
| John Herschelman Director | 0.00 | X | | | | | 0. | 0. | 0. | |
| Paul Rademacher Executive Officer | 40.00 | X | | X | | | 82,245. | 0. | 0. | |
| Karen J. Viar Secretary | 40.00 | | | X | | | 58,195. | 0. | 0. | |
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Part VIII Statement of Revenue

| | | | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512, 513, or 514 | |
|---|--|--|----------------------|--|---|---|--|
| CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS | 1 a Federated campaigns | 1 a | | | | | |
| | b Membership dues | 1 b | 66,342. | | | | |
| | c Fundraising events | 1 c | | | | | |
| | d Related organizations | 1 d | | | | | |
| | e Government grants (contributions) | 1 e | | | | | |
| | f All other contributions, gifts, grants, and similar amounts not included above | 1 f | 74,375. | | | | |
| | g Noncash contribns included in lns 1a-1f: \$ | | | | | | |
| | h Total. Add lines 1a-1f | | 140,717. | | | | |
| PROGRAM SERVICE REVENUE | Business Code | | | | | | |
| | 2 a ----- | | | | | | |
| | b ----- | | | | | | |
| | c ----- | | | | | | |
| | d ----- | | | | | | |
| | e ----- | | | | | | |
| | f All other program service revenue | | 2,556,747. | 2,556,747. | 0. | 0. | |
| g Total. Add lines 2a-2f | | 2,556,747. | | | | | |
| OTHER REVENUE | 3 Investment income (including dividends, interest and other similar amounts) | | 24,084. | 24,084. | 0. | 0. | |
| | 4 Income from investment of tax-exempt bond proceeds | | | | | | |
| | 5 Royalties | | | | | | |
| | 6 a Gross Rents | (i) Real | 14,976. | | | | |
| | | (ii) Personal | | | | | |
| | | b Less: rental expenses | 0. | | | | |
| | | c Rental income or (loss) | 14,976. | | | | |
| | d Net rental income or (loss) | | 14,976. | 14,976. | 0. | 0. | |
| | 7 a Gross amount from sales of assets other than inventory | (i) Securities | -9,280. | | | | |
| | | (ii) Other | | | | | |
| | | b Less: cost or other basis and sales expenses | 0. | | | | |
| | | c Gain or (loss) | -9,280. | | | | |
| | d Net gain or (loss) | | -9,280. | -9,280. | 0. | 0. | |
| | 8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 | a | | | | | |
| | | b Less: direct expenses | | | | | |
| | | c Net income or (loss) from fundraising events | | | | | |
| | 9 a Gross income from gaming activities. See Part IV, line 19 | a | | | | | |
| b Less: direct expenses | | | | | | | |
| c Net income or (loss) from gaming activities | | | | | | | |
| 10 a Gross sales of inventory, less returns and allowances | a | | | | | | |
| | b Less: cost of goods sold | | | | | | |
| | c Net income or (loss) from sales of inventory | | | | | | |
| Miscellaneous Revenue | | Business Code | | | | | |
| 11 a ----- | | | | | | | |
| b ----- | | | | | | | |
| c ----- | | | | | | | |
| d All other revenue | | | | | | | |
| e Total. Add lines 11a-11d | | | | | | | |
| 12 Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e | | | 2,727,244. | 2,586,527. | 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) but are not required to complete columns (B), (C), and (D).

| <i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i> | (A) Total expenses | (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
|---|-----------------------|---------------------------------|--|-----------------------------|
| 1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21 | | | | |
| 2 Grants and other assistance to individuals in the U.S. See Part IV, line 22 | | | | |
| 3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16 | | | | |
| 4 Benefits paid to or for members | | | | |
| 5 Compensation of current officers, directors, trustees, and key employees | 280,254. | 202,434. | 77,820. | 0. |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1) and persons described in section 4958(c)(3)(B)) | 460,980. | 428,980. | 32,000. | 0. |
| 7 Other salaries and wages | | | | |
| 8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions) | 7,039. | 7,039. | 0. | 0. |
| 9 Other employee benefits | 72,513. | 72,513. | 0. | 0. |
| 10 Payroll taxes | 55,914. | 48,086. | 7,828. | 0. |
| 11 Fees for services (non-employees) | | | | |
| a Management | | | | |
| b Legal | 42,955. | 0. | 42,955. | 0. |
| c Accounting | 19,850. | 0. | 19,850. | 0. |
| d Lobbying | | | | |
| e Prof fundraising svcs. See Part IV, ln 17 | | | | |
| f Investment management fees | | | | |
| g Other | | | | |
| 12 Advertising and promotion | 14,765. | 14,765. | 0. | 0. |
| 13 Office expenses | 33,227. | 33,227. | 0. | 0. |
| 14 Information technology | | | | |
| 15 Royalties | 132,863. | 132,863. | 0. | 0. |
| 16 Occupancy | | | | |
| 17 Travel | 87,133. | 87,133. | 0. | 0. |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| 19 Conferences, conventions, and meetings | 592. | 0. | 592. | 0. |
| 20 Interest | 15,342. | 15,342. | 0. | 0. |
| 21 Payments to affiliates | | | | |
| 22 Depreciation, depletion, and amortization | 139,261. | 128,120. | 11,141. | 0. |
| 23 Insurance | | | | |
| 24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.) | | | | |
| a <u>Advertising</u> | 0. | 0. | 0. | 0. |
| b <u>Automobile</u> | 13,083. | 13,083. | 0. | 0. |
| c <u>Books, Subscriptions, Reference</u> | 1,030. | 1,030. | 0. | 0. |
| d <u>Brochure Log</u> | 0. | 0. | 0. | 0. |
| e <u>Business Registration Fee</u> | 236. | 236. | 0. | 0. |
| f All other expenses | 1,158,154. | 1,063,421. | 94,733. | 0. |
| 25 Total functional expenses. Add lines 1 through 24f | 2,535,191. | 2,248,272. | 286,919. | 0. |
| 26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation | | | | |

Part X Balance Sheet

| | | (A) Beginning of year | | (B) End of year |
|---|---|--------------------------|------------|--------------------|
| ASSETS | 1 Cash — non-interest-bearing | 732,558. | 1 | 305,780. |
| | 2 Savings and temporary cash investments | 753,829. | 2 | 760,202. |
| | 3 Pledges and grants receivable, net | | 3 | |
| | 4 Accounts receivable, net | 0. | 4 | |
| | 5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L | | 5 | |
| | 6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L | | 6 | |
| | 7 Notes and loans receivable, net | | 7 | |
| | 8 Inventories for sale or use | 65,877. | 8 | 116,520. |
| | 9 Prepaid expenses and deferred charges | | 9 | |
| | 10a Land, buildings, and equipment: cost basis | 10a 3,679,859. | | |
| | b Less: accumulated depreciation. Complete Part VI of Schedule D | 10b 1,657,238. | 1,526,388. | 10c 2,022,621. |
| | 11 Investments — publicly-traded securities | | 11 | |
| | 12 Investments — other securities. See Part IV, line 11 | | 12 | |
| | 13 Investments — program-related. See Part IV, line 11 | | 13 | |
| | 14 Intangible assets | | 14 | |
| | 15 Other assets. See Part IV, line 11 | 6,311. | 15 | 14,059. |
| 16 Total assets. Add lines 1 through 15 (must equal line 34) | 3,084,963. | 16 | 3,219,182. | |
| LIABILITIES | 17 Accounts payable and accrued expenses | 39,769. | 17 | 44,028. |
| | 18 Grants payable | | 18 | |
| | 19 Deferred revenue | 0. | 19 | |
| | 20 Tax-exempt bond liabilities | | 20 | |
| | 21 Escrow account liability. Complete Part IV of Schedule D | | 21 | |
| | 22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L | | 22 | |
| | 23 Secured mortgages and notes payable to unrelated third parties | | 23 | |
| | 24 Unsecured notes and loans payable | 198,662. | 24 | 194,227. |
| | 25 Other liabilities. Complete Part X of Schedule D | 364,848. | 25 | 294,184. |
| | 26 Total liabilities. Add lines 17 through 25 | 603,279. | 26 | 532,439. |
| NET ASSETS OR FUND BALANCES | Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29 and lines 33 and 34. | | | |
| | 27 Unrestricted net assets | 2,481,684. | 27 | 2,673,090. |
| | 28 Temporarily restricted net assets | | 28 | 13,653. |
| | 29 Permanently restricted net assets | | 29 | |
| | Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34. | | | |
| | 30 Capital stock or trust principal, or current funds | | 30 | |
| | 31 Paid-in or capital surplus, or land, building, and equipment fund | | 31 | |
| | 32 Retained earnings, endowment, accumulated income, or other funds | | 32 | |
| | 33 Total net assets or fund balances. | 2,481,684. | 33 | 2,686,743. |
| 34 Total liabilities and net assets/fund balances. | 3,084,963. | 34 | 3,219,182. | |

Part XI Financial Statements and Reporting

| | | Yes | No |
|----|--|-----|----|
| 1 | Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | | X |
| b | Were the organization's financial statements audited by an independent accountant? | | X |
| c | If 'Yes' to 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? | | |
| 3a | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? | | X |
| b | If 'Yes,' did the organization undergo the required audit or audits? | | |

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

To be completed by all section 501 (c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

2008

Open to Public Inspection

| | |
|---|---|
| Name of the organization The Monroe Institute | Employer identification number 54-1824173 |
|---|---|

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: (Please check only **one** organization.)

- 1 A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**. (Attach Schedule H.)
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33-1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**. (see instructions)
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or 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 that describes the type of supporting organization and complete lines 11e through 11h.
 - a Type I
 - b Type II
 - c Type III — Functionally integrated
 - d Type III— Other
- e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

| | Yes | No |
|--|-----|----|
| (i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? | | |
| (ii) a family member of a person described in (i) above? | | |
| (iii) a 35% controlled entity of a person described in (i) or (ii) above? | | |

| (i) Name of Supported Organization | (ii) EIN | (iii) Type of organization (described on lines 1-9 above or IRC section (see instructions)) | (iv) Is the organization in col. (i) listed in your governing document? | | (v) Did you notify the organization in col. (i) of your support? | | (vi) Is the organization in col. (i) organized in the U.S.? | | (vii) Amount of Support |
|------------------------------------|----------|---|---|----|--|----|---|----|-------------------------|
| | | | Yes | No | Yes | No | Yes | No | |
| | | | | | | | | | |
| | | | | | | | | | |
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| | | | | | | | | | |
| | | | | | | | | | |
| Total | | | | | | | | | |

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

| Calendar year (or fiscal year beginning in) ▶ | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| 1 Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants.') | | | | | | |
| 2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf | | | | | | |
| 3 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge | | | | | | |
| 4 Total. Add lines 1-3 | | | | | | |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) | | | | | | |
| 6 Public support. Subtract line 5 from line 4 | | | | | | |

Section B. Total Support

| Calendar year (or fiscal year beginning in) ▶ | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|---|----------|----------|----------|----------|-----------|-----------|
| 7 Amounts from line 4 | | | | | | |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | | | | | | |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on | | | | | | |
| 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) | | | | | | |
| 11 Total support. Add lines 7 through 10 | | | | | | |
| 12 Gross receipts from related activities, etc. (see instructions) | | | | | 12 | |

13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

Section C. Computation of Public Support Percentage

| | | |
|--|-----------|---|
| 14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f)) | 14 | % |
| 15 Public support percentage for 2007 Schedule A, Part IV-A, line 26f | 15 | % |

16a 33-1/3 support test – 2008. If the organization did not check the box on line 13, and the line 14 is 33-1/3 % or more, check this box and **stop here.** The organization qualifies as a publicly supported organization.

b 33-1/3 support test – 2007. If the organization did not check a box on line 13, or 16a, and line 15 is 33-1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization.

17a 10%-facts-and-circumstances test – 2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization.

b 10%-facts-and-circumstances test – 2007. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization.

18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions

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

(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

| Calendar year (or fiscal yr beginning in) ▶ | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|---|----------|----------|----------|------------|------------|------------|
| 1 Gifts, grants, contributions and membership fees received. (Do not include "unusual grants.") | | | | | | |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt purpose | | | | 2,081,294. | 2,556,747. | 4,638,041. |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513 | | | | | | |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 6 Total. Add lines 1-5 | | | | 2,081,294. | 2,556,747. | 4,638,041. |
| 7a Amounts included on lines 1, 2, 3 received from disqualified persons | | | | | | |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000 | | | | | | |
| c Add lines 7a and 7b | | | | | | |
| 8 Public support (Subtract line 7c from line 6.) | | | | | | 4,638,041. |

Section B. Total Support

| Calendar year (or fiscal yr beginning in) ▶ | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|---|----------|----------|----------|------------|------------|------------|
| 9 Amounts from line 6 | | | | 2,081,294. | 2,556,747. | 4,638,041. |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | | | | 65,469. | 29,780. | 95,249. |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 | | | | | | |
| c Add lines 10a and 10b | | | | 65,469. | 29,780. | 95,249. |
| 11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on | | | | | | |
| 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) | | | | | | |
| 13 Total support. (add lns 9, 10c, 11, and 12.) | | | | | | 4,733,290. |

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

Section C. Computation of Public Support Percentage

| | | |
|--|-----------|---------|
| 15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f)) | 15 | 97.99% |
| 16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g | 16 | 100.00% |

Section D. Computation of Investment Income Percentage

| | | |
|---|-----------|-------|
| 17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f)) | 17 | 2.01% |
| 18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h | 18 | % |

19a 33-1/3 support tests – 2008. 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 – 2007. If the organization did not check a box on line 14 or 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

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Attach to Form 990. To be completed by organizations that answered 'Yes,' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11, or 12.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

The Monroe Institute

Employer identification number

54-1824173

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate contributions, aggregate grants, aggregate value, and two yes/no questions about donor advisement.

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

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include purpose of easements, total number of easements, acreage restricted, number of easements on historic structures, and monitoring details.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include questions about reporting works of art and historical treasures for public exhibition, education, or research.

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

3 Using the organization's 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 XIV.

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 Trust, Escrow and Custodial Arrangements Complete if organization answered 'Yes' to 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 XIV and complete the following table:

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

2a Did the organization include an amount on Form 990, Part X, line 21? Yes No

b If 'Yes,' explain the arrangement in Part XIV.

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

| | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance | | | | | |
| b Contributions | | | | | |
| c Investment earnings or losses | | | | | |
| d Grants or scholarships | | | | | |
| e Other expenditures for facilities and programs | | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | | | | | |

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment _____ %
- b Permanent endowment _____ %
- c Term endowment _____ %

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

| | Yes | No |
|---|--------|----|
| (i) unrelated organizations | 3a(i) | |
| (ii) related organizations | 3a(ii) | |
| b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R? | 3b | |

4 Describe in Part XIV the intended uses of the organization's endowment funds.

Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

| Description of investment | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Depreciation | (d) Book Value |
|---|--------------------------------------|---------------------------------|------------------|-------------------|
| 1a Land | 589,286. | | | 589,286. |
| b Buildings | 2,235,057. | | 1,209,713. | 1,025,344. |
| c Leasehold improvements | 133,593. | | 3,178. | 130,415. |
| d Equipment | 721,923. | | 444,347. | 277,576. |
| e Other | | | | |
| Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) | | | | 2,022,621. |

BAA

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

| | | |
|-----------|--|--|
| 1 | Total revenue (Form 990, Part VIII, column (A), line 12) | |
| 2 | Total expenses (Form 990, Part IX, column (A), line 25) | |
| 3 | Excess or (deficit) for the year. Subtract line 2 from line 1 | |
| 4 | Net unrealized gains (losses) on investments | |
| 5 | Donated services and use of facilities | |
| 6 | Investment expenses | |
| 7 | Prior period adjustments | |
| 8 | Other (Describe in Part XIV) | |
| 9 | Total adjustments (net). Add lines 4-8 | |
| 10 | Excess or (deficit) for the year per financial statements. Combine lines 3 and 9 | |

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

| | | | |
|----------|--|-----------|-----------|
| 1 | Total revenue, gains, and other support per audited financial statements | | 1 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12: | | |
| | a Net unrealized gains on investments | 2a | |
| | b Donated services and use of facilities | 2b | |
| | c Recoveries of prior year grants | 2c | |
| | d Other (Describe in Part XIV) | 2d | |
| | e Add lines 2a through 2d | | 2e |
| 3 | Subtract line 2e from line 1 | | 3 |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1: | | |
| | a Investments expenses not included on Form 990, Part VIII, line 7b | 4a | |
| | b Other (Describe in Part XIV) | 4b | |
| | c Add lines 4a and 4b | | 4c |
| 5 | Total revenue. Add lines 3 and 4c . (This should equal Form 990, Part I, line 12.) | | 5 |

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

| | | | |
|----------|---|-----------|-----------|
| 1 | Total expenses and losses per audited financial statements | | 1 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25: | | |
| | a Donated services and use of facilities | 2a | |
| | b Prior year adjustments | 2b | |
| | c Losses reported on Form 990, Part IX, line 25 | 2c | |
| | d Other (Describe in Part XIV) | 2d | |
| | e Add lines 2a through 2d | | 2e |
| 3 | Subtract line 2e from line 1 | | 3 |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1: | | |
| | a Investments expenses not included on Form 990, Part VIII, line 7b | 4a | |
| | b Other (Describe in Part XIV) | 4b | |
| | c Add lines 4a and 4b | | 4c |
| 5 | Total expenses. Add lines 3 and 4c . (This should equal Form 990, Part I, line 18.) | | 5 |

Part XIV Supplemental Information

Complete this part to 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; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b.

SCHEDULE E
(Form 990 or 990-EZ)

Schools

OMB No. 1545-0047

2008

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ **To be completed by organizations that answer 'Yes' to Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**
▶ **Attach to Form 990 or Form 990-EZ.**

Name of the organization

The Monroe Institute

Employer identification number

54-1824173

| | YES | NO |
|---|-----|----|
| 1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? | X | |
| 2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? | X | |
| 3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it had no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If 'Yes,' please describe. If 'No,' please explain | X | |
| <u>Policy is published on the company website</u> | | |
| <u>www.monroeinstitute.org</u> | | |
| 4 Does the organization maintain the following? | | |
| a Records indicating the racial composition of the student body, faculty, and administrative staff? | X | |
| b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? | X | |
| c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? | X | |
| d Copies of all material used by the organization or on its behalf to solicit contributions? | X | |
| If you answered 'No,' to any of the above, please explain. (If you need more space, attach a separate statement.) | | |
| 5 Does the organization discriminate by race in any way with respect to: | | |
| a Students' rights or privileges? | | X |
| b Admissions policies? | | X |
| c Employment of faculty or administrative staff? | | X |
| d Scholarships or other financial assistance? | | X |
| e Educational policies? | | X |
| f Use of facilities? | | X |
| g Athletic programs? | | X |
| h Other extracurricular activities? | | X |
| If you answered 'Yes,' to any of the above, please explain. (If you need more space, attach a separate statement.) | | |
| 6a Does the organization receive any financial aid or assistance from a governmental agency? | | X |
| b Has the organization's right to such aid ever been revoked or suspended? | | X |
| If you answered 'Yes,' to either line 6a or line b, please explain using an attached statement. | | |
| 7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If 'No,' attach an explanation | X | |

Supplemental Information to Form 990

2008

Open to Public
Inspection

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

Department of the Treasury
Internal Revenue Service

Name of the organization

The Monroe Institute

Employer identification number

54-1824173

Pt VI-A, Line 10 a copy of form 990 (2008) was provided to the Board of Directors for information and for the purposes of review and comment if necessary before it was filed.

Pt VI-B, Line 12c The Monroe Institute's conflict of interest policy applies to the Board of Directors and all key employees. The Chariman of the Board and the Executive Director determine when and if a conflict of interest arises and monitor such conflicts accordingly. If a conflict-of-interest involves a member of the governing body, those involved are prohibited from voting on matters pertaining to said conflict. In all cases, parties to conflict-of-interst situations are counseled to avoid activities which may result in the appearance of impropriety.

Pt VI-B, Line 15 Compesation for The Monroe Institute's Executive Director and officers was approved in advance by disinterested members of the Board of Directors without interrelated conflicts of interst. The disinterested board members determined relevant compensation based on comparisons with compensation data for similarly qualified persons in functionally comparable positions at similarly situated organizations provided by ERI Economic Research Institute, Inc. 8575 164th Ave NE Suite 100, Redomd, WA 98052.

Name of the organization

Employer identification number

The Monroe Institute

54-1824173

Pt VI-C, Line 19 The Monroe Institute makes its governing documents,
 conflict-of-interest policy, and financial statements
 available to the public during normal business hours
 in the business office at 365 Roberts Mountain Road,
 Faber, VA 22938 and online at www.monroeinstitute.org.

**Depreciation and Amortization
(Including Information on Listed Property)**

▶ See separate instructions. ▶ Attach to your tax return.

Name(s) shown on return

The Monroe Institute

Identifying number

54-1824173

Business or activity to which this form relates

Form 990 / Form 990EZ

Part I Election To Expense Certain Property Under Section 179

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

| | | | |
|----|---|------------------------------|------------------|
| 1 | Maximum amount. See the instructions for a higher limit for certain businesses | 1 | \$250,000. |
| 2 | Total cost of section 179 property placed in service (see instructions) | 2 | |
| 3 | Threshold cost of section 179 property before reduction in limitation (see instructions) | 3 | \$800,000. |
| 4 | Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0- | 4 | |
| 5 | Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions | 5 | |
| 6 | (a) Description of property | (b) Cost (business use only) | (c) Elected cost |
| 7 | Listed property. Enter the amount from line 29 | 7 | |
| 8 | Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7 | 8 | |
| 9 | Tentative deduction. Enter the smaller of line 5 or line 8 | 9 | |
| 10 | Carryover of disallowed deduction from line 13 of your 2007 Form 4562 | 10 | |
| 11 | Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instrs) | 11 | |
| 12 | Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11 | 12 | |
| 13 | Carryover of disallowed deduction to 2009. Add lines 9 and 10, less line 12 | ▶ 13 | |

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

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

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

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

Section A

| | | | |
|----|--|----|----------|
| 17 | MACRS deductions for assets placed in service in tax years beginning before 2008 | 17 | 128,243. |
| 18 | If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/> | | |

Section B — Assets Placed in Service During 2008 Tax Year Using the General Depreciation System

| (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investment use only — see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
|--------------------------------|--------------------------------------|--|---------------------|----------------|------------|----------------------------|
| 19a 3-year property | | | | | | |
| b 5-year property | | 157,744. | 5.0 yrs | MQ | SL | 4,366. |
| c 7-year property | | | | | | |
| d 10-year property | | 42,448. | 10.0 yrs | MQ | SL | 1,648. |
| e 15-year property | | | | | | |
| f 20-year property | | 133,593. | 20.0 yrs | MQ | SL | 3,129. |
| g 25-year property | | | 25 yrs | | S/L | |
| h Residential rental property | | | 27.5 yrs | MM | S/L | |
| | | | 27.5 yrs | MM | S/L | |
| i Nonresidential real property | | | 39 yrs | MM | S/L | |
| | | | | MM | S/L | |

Section C — Assets Placed in Service During 2008 Tax Year Using the Alternative Depreciation System

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

Part IV Summary (See instructions.)

| | | | |
|----|--|----|----------|
| 21 | Listed property. Enter amount from line 28 | 21 | 1,875. |
| 22 | Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations — see instructions | 22 | 139,261. |
| 23 | For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs | 23 | |

Part V Listed Property (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A – Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

| 24a Do you have evidence to support the business/investment use claimed? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | | | | 24b If 'Yes,' is the evidence written? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | | |
|--|-------------------------------|---|----------------------------|--|------------------------|--------------------------|-------------------------------|---------------------------------|---|--|--|
| (a) Type of property (list vehicles first) | (b) Date placed in service | (c) Business/investment use percentage | (d) Cost or other basis | (e) Basis for depreciation (business/investment use only) | (f) Recovery period | (g) Method/Convention | (h) Depreciation deduction | (i) Elected section 179 cost | | | |
| 25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions) 25 | | | | | | | | | | | |
| 26 Property used more than 50% in a qualified business use: | | | | | | | | | | | |
| 2003 E350 Club Ford | 03/29/04 | 100.00 | 16,515. | 16,515. | 5.00 | SL/HY | 1,875. | | | | |
| 27 Property used 50% or less in a qualified business use: | | | | | | | | | | | |
| 28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1 28 | | | | | | | | 1,875. | | | |
| 29 Add amounts in column (i), line 26. Enter here and on line 7, page 1 29 | | | | | | | | | | | |

Section B – Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other 'more than 5% owner,' or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

| | (a) Vehicle 1 | | (b) Vehicle 2 | | (c) Vehicle 3 | | (d) Vehicle 4 | | (e) Vehicle 5 | | (f) Vehicle 6 | |
|---|------------------|----|------------------|----|------------------|----|------------------|----|------------------|----|------------------|----|
| | Yes | No | Yes | No | Yes | No | Yes | No | Yes | No | Yes | No |
| 30 Total business/investment miles driven during the year (do not include commuting miles) | | | | | | | | | | | | |
| 31 Total commuting miles driven during the year | | | | | | | | | | | | |
| 32 Total other personal (noncommuting) miles driven | | | | | | | | | | | | |
| 33 Total miles driven during the year. Add lines 30 through 32 | | | | | | | | | | | | |
| 34 Was the vehicle available for personal use during off-duty hours? | | | | | | | | | | | | |
| 35 Was the vehicle used primarily by a more than 5% owner or related person? | | | | | | | | | | | | |
| 36 Is another vehicle available for personal use? | | | | | | | | | | | | |

Section C – Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see instructions).

| | Yes | No |
|--|-----|----|
| 37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees? | | |
| 38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners | | |
| 39 Do you treat all use of vehicles by employees as personal use? | | |
| 40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received? | | |
| 41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions.) | | |

Note: If your answer to 37, 38, 39, 40, or 41 is 'Yes,' do not complete Section B for the covered vehicles.

Part VI Amortization

| (a) Description of costs | (b) Date amortization begins | (c) Amortizable amount | (d) Code section | (e) Amortization period or percentage | (f) Amortization for this year |
|--|---------------------------------|---------------------------|---------------------|--|-----------------------------------|
| 42 Amortization of costs that begins during your 2008 tax year (see instructions): | | | | | |
| 43 Amortization of costs that began before your 2008 tax year 43 | | | | | |
| 44 Total. Add amounts in column (f). See the instructions for where to report 44 | | | | | |

**990-EZ, 990, 990-T and 990-PF
Information Worksheet**

2008

Part I – Identifying Information

Employer Identification Number 54-1824173
 Name The Monroe Institute
 Address 365 Roberts Mountain Road Room/Suite _____
 City Faber State ... VA ZIP Code ... 22938
 Foreign Country _____
 Telephone Number (434) 361-1252 Extension _____
 Fax _____ E-Mail Address _____

Eligible for hurricane tax relief legislation benefits, check here

Part II – Type of Return

- | | |
|--|---|
| <input type="checkbox"/> Form 990-EZ only | <input type="checkbox"/> Form 990-EZ with Form 990-T |
| <input checked="" type="checkbox"/> Form 990 only | <input type="checkbox"/> Form 990 with Form 990-T |
| <input type="checkbox"/> Form 990-PF only | <input type="checkbox"/> Form 990-PF with Form 990-T |
| <input type="checkbox"/> Form 990-T only | <input type="checkbox"/> Form 990-N (gross receipts \$25,000 or less) for Electronic Filing only |

QuickBooks Import Users & 990 to 990-EZ Data Transfer Option: Check if you're filing the EZ & want 990 imported data copied to the EZ **OR** for those not importing from QuickBooks who transferred from prior year 990 and now qualify to file the EZ this year, check this box to transfer 990 data to the EZ.

IMPORTANT

Before transferring data from Form 990 to Form 990-EZ, refer to "How to transfer data from filing Form 990 to 990-EZ" listed above in the Most Common Support Questions or Tax Help for this line.

Part III – Type of Organization

- | | | |
|--|------------------------------|---|
| <input checked="" type="checkbox"/> 501(c) Corporation/Association | <u>3</u> (subsection number) | <input type="checkbox"/> 220(e) Trust |
| <input type="checkbox"/> 501(c) Trust | _____ (subsection number) | <input type="checkbox"/> 408A Trust |
| <input type="checkbox"/> 4947(a)(1) Trust | | <input type="checkbox"/> 529(a) Corporation |
| <input type="checkbox"/> 408(e) Trust | | <input type="checkbox"/> 529(a) Trust |
| <input type="checkbox"/> 401(a) Trust | | <input type="checkbox"/> 530(a) Trust |
| <input type="checkbox"/> Other _____ (describe) | | <input type="checkbox"/> 527 Organization |
| | | <input type="checkbox"/> 501(c) Association |

Part IV – Tax Year and Filing Information

- Calendar year
- Fiscal year – Ending month _____
- Short year – Beginning date _____ Ending date _____
- Check this box if the organization is enrolled in the Electronic Federal Tax Payment System (EFTPS)

Part V – 2008 Estimated Taxes Paid

Check this box if the organization is a private foundation

Form 990-T Form 990-PF

Amount of 2007 overpayment credited to 2008 estimated tax _____

| Payment Quarters | Due Date | Form 990-T | | Form 990-PF | |
|----------------------|-----------------|------------|-------------|-------------|-------------|
| | | Date Paid | Amount Paid | Date Paid | Amount Paid |
| 1st Quarter Payment | <u>04/15/08</u> | _____ | _____ | _____ | _____ |
| 2nd Quarter Payment | <u>06/16/08</u> | _____ | _____ | _____ | _____ |
| 3rd Quarter Payment | <u>09/15/08</u> | _____ | _____ | _____ | _____ |
| 4th Quarter Payment | <u>12/15/08</u> | _____ | _____ | _____ | _____ |
| Additional Payment 1 | | _____ | _____ | _____ | _____ |
| Additional Payment 2 | | _____ | _____ | _____ | _____ |
| Additional Payment 3 | | _____ | _____ | _____ | _____ |
| Additional Payment 4 | | _____ | _____ | _____ | _____ |

Part VI – Electronic Filing Information

Electronic Filing:

File the federal return electronically

Practitioner PIN program:

Sign this return electronically using the Practitioner PIN
 ERO entered PIN
Officer's PIN (enter any 5 numbers) 12345
Date PIN entered 08/12/2009

Electronic Filing of Extensions:

Check this box to file Form 8868 (application for extension of time to file return) electronically

Information required for Electronic Filing:

Officer's Name Frederick H. Atwater

Electronic Filing of Amended Return:

Check this box to file amended return electronically

Part VII – Electronic Funds Withdrawal Information (Form 990PF filers only)

Yes No
 Use electronic funds withdrawal of federal balance due (EF only)?
 Use electronic funds withdrawal of Form 8868 balance due (EF only)?
 Use electronic funds withdrawal of amended return balance due (EF only)?
If any options selected above, enter information below, (Review transferred information for accuracy)

Bank Information

Name of Financial Institution (optional)
Check the appropriate box Checking Savings
Routing number
Account number

Payment Information

Enter the payment date to withdraw tax payment
Balance due amount from this return
Enter an amount to withdraw tax payment
If partial payment is made, the remaining balance due

Part VIII – Information for Client Letter

Table with 4 columns: Form 990-EZ or Form 990, Form 990-PF, Form 990-T, and Extended Due Date.

Letter Salutation Skip Atwater

Part IX – Return Preparer

Enter preparer code from Firm/Preparer Info (See Help) mk
QuickZoom to Firm/Preparer Info

- QuickZoom to Form 990-EZ, Pages 1 through 4
QuickZoom to Form 990, Page 1
QuickZoom to Form 990-PF, Page 1
QuickZoom to Form 990-T, Page 1
QuickZoom to Form 990-N, e-PostCard

QuickZoom to Client Status



teew0101.SCR 02/25/09

Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Depreciation and Amortization Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation |
|--------------------------------|------|-----------------|--------------------|----------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|
| DEPRECIATION | | | | | | | | | | | | |
| DFH-Office, Computer Monitors | | 01/30/08 | 1,088 | | 100.00 | | | 1,088 | 5.00 | SL/MQ | | 190 |
| DFH-Laserjet Printer | | 02/18/08 | 945 | | 100.00 | | | 945 | 5.00 | SL/MQ | | 165 |
| NPC-Property Improvement | | 03/11/08 | 16,893 | | 100.00 | | | 16,893 | 20.00 | SL/MQ | | 739 |
| Restaurant Range | | 03/24/08 | 5,261 | | 100.00 | | | 5,261 | 10.00 | SL/MQ | | 460 |
| LawnMower | | 04/23/08 | 5,144 | | 100.00 | | | 5,144 | 10.00 | SL/MQ | | 322 |
| Computer XPS | | 05/20/08 | 1,183 | | 100.00 | | | 1,183 | 5.00 | SL/MQ | | 148 |
| General Property Improvements | | 06/23/08 | 59,686 | | 100.00 | | | 59,686 | 20.00 | SL/MQ | | 1,865 |
| Lab-Office Computers/Equipment | | 07/09/08 | 2,660 | | 100.00 | | | 2,660 | 10.00 | SL/MQ | | 100 |
| DFH Conference Equipment | | 07/22/08 | 10,519 | | 100.00 | | | 10,519 | 10.00 | SL/MQ | | 394 |
| Lab Offices | | 09/22/08 | 5,434 | | 100.00 | | | 5,434 | 10.00 | SL/MQ | | 204 |
| Lab-Office, Property Improv | | 09/30/08 | 13,531 | | 100.00 | | | 13,531 | 20.00 | SL/MQ | | 254 |
| DFH-Property Improvement | | 10/21/08 | 33,016 | | 100.00 | | | 33,016 | 20.00 | SL/MQ | | 206 |
| NPC-Video Equipment | | 11/04/08 | 5,020 | | 100.00 | | | 5,020 | 10.00 | SL/MQ | | 63 |
| Lab-Office Equipment | | 11/25/08 | 4,467 | | 100.00 | | | 4,467 | 10.00 | SL/MQ | | 56 |
| Gate House-Property Improv | | 12/15/08 | 10,467 | | 100.00 | | | 10,467 | 20.00 | SL/MQ | | 65 |
| NPC-Kitchen | | 12/31/08 | 3,943 | | 100.00 | | | 3,943 | 10.00 | SL/MQ | | 49 |
| TMI Website | | 12/31/08 | 154,528 | | 100.00 | | | 154,528 | 5.00 | SL/MQ | | 3,863 |
| SUBTOTAL CURRENT YEAR | | | 333,785 | 0 | | 0 | 0 | 333,785 | | | 0 | 9,143 |
| Air Conditioning | | 07/01/87 | 9,485 | | 100.00 | | | 9,485 | 31.50 | SL/MM | 4,728 | 431 |
| Fire Symm | | 08/13/89 | 1,869 | | 100.00 | | | 1,869 | 31.50 | SL/MM | 836 | 79 |
| Air Conditioning | | 11/19/89 | 2,795 | | 100.00 | | | 2,795 | 31.50 | SL/MM | 1,232 | 117 |
| Bl Ridge Phones | | 06/15/90 | 1,195 | | 100.00 | | | 1,195 | 31.50 | SL/MM | 509 | 49 |
| Center Buildings | | 09/30/94 | 520,980 | | 100.00 | | | 520,980 | 25.00 | SL/HY | 276,119 | 21,292 |
| Center Buildings | | 02/01/95 | 378,006 | | 100.00 | | | 378,006 | 25.00 | SL/HY | 195,303 | 14,616 |
| Lab Bldg Roof | | 05/30/95 | 1,730 | | 100.00 | | | 1,730 | 15.00 | SL/HY | 1,451 | 112 |
| Lab Heating System | | 11/09/95 | 3,462 | | 100.00 | | | 3,462 | 15.00 | SL/HY | 2,808 | 262 |
| Heat AC | | 04/24/96 | 2,920 | | 100.00 | | | 2,920 | 15.00 | SL/HY | 2,271 | 185 |
| Water Heater | | 12/01/97 | 737 | | 100.00 | | | 737 | 10.00 | SL/HY | 737 | 0 |
| Baby Grand Piano | | 07/08/98 | 1,306 | | 100.00 | | | 1,306 | 10.00 | SL/HY | 1,241 | 65 |
| NPC Brick Walkway | | 08/25/98 | 900 | | 100.00 | | | 900 | 10.00 | SL/HY | 840 | 60 |
| RMRC Pool and Landscape | | 11/01/98 | 41,840 | | 100.00 | | | 41,840 | 10.00 | SL/HY | 38,354 | 3,486 |
| RMRC Buildings | | 11/01/98 | 850,492 | | 100.00 | | | 850,492 | 20.00 | SL/HY | 389,809 | 43,875 |
| NPC Deck Addition | | 11/02/98 | 3,705 | | 100.00 | | | 3,705 | 10.00 | SL/HY | 3,396 | 309 |
| Gatehouse Deck | | 12/30/98 | 4,725 | | 100.00 | | | 4,725 | 10.00 | SL/HY | 4,252 | 473 |
| NPC Landscaping | | 12/31/98 | 1,037 | | 100.00 | | | 1,037 | 10.00 | SL/HY | 934 | 103 |

Code: S = Sold, A = Auto, L = Listed, C = COGS

Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Depreciation and Amortization Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation |
|---------------------------|------|-----------------|--------------------|------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|
| DR Round Pedestal | | 02/26/99 | 1,367 | | 100.00 | | | 1,367 | 10.00 | SL/HY | 1,208 | 106 |
| Seed on Pool Pump | | 03/29/99 | 1,630 | | 100.00 | | | 1,630 | 10.00 | SL/HY | 1,426 | 136 |
| Beverage Air Refrigerator | | 03/29/99 | 2,482 | | 100.00 | | | 2,482 | 10.00 | SL/HY | 2,171 | 207 |
| DFH Roof | | 04/12/99 | 4,050 | | 100.00 | | | 4,050 | 15.00 | SL/HY | 2,363 | 260 |
| DFH Siding | | 05/15/99 | 2,933 | | 100.00 | | | 2,933 | 15.00 | SL/HY | 1,695 | 190 |
| Fox Den Sect Couch | | 06/07/99 | 6,156 | | 100.00 | | | 6,156 | 10.00 | SL/HY | 5,284 | 581 |
| Remodel GH | | 06/15/99 | 6,209 | | 100.00 | | | 6,209 | 10.00 | SL/HY | 5,329 | 587 |
| Orme Fence Gates | | 07/27/99 | 853 | | 100.00 | | | 853 | 10.00 | SL/HY | 718 | 90 |
| Lab Siding | | 09/03/99 | 4,000 | | 100.00 | | | 4,000 | 15.00 | SL/HY | 2,223 | 273 |
| Gatehouse Bldg | | 12/06/99 | 129,958 | | 100.00 | | | 129,958 | 20.00 | SL/HY | 52,525 | 6,733 |
| GH Roof | | 12/22/99 | 4,500 | | 100.00 | | | 4,500 | 15.00 | SL/HY | 2,400 | 323 |
| New GH Siding | | 12/22/99 | 9,517 | | 100.00 | | | 9,517 | 15.00 | SL/HY | 5,075 | 683 |
| NPC Siding | | 02/11/00 | 5,950 | | 100.00 | | | 5,950 | 15.00 | SL/HY | 3,141 | 375 |
| NPC Roof | | 03/07/00 | 5,811 | | 100.00 | | | 5,811 | 15.00 | SL/HY | 3,034 | 370 |
| NPC Skylight | | 03/08/00 | 940 | | 100.00 | | | 940 | 7.00 | SL/HY | 940 | 0 |
| NPC Capt Chairs | | 04/01/00 | 5,197 | | 100.00 | | | 5,197 | 7.00 | SL/HY | 5,197 | 0 |
| RMR Carpet | | 04/01/00 | 3,061 | | 100.00 | | | 3,061 | 7.00 | SL/HY | 3,061 | 0 |
| True Refrigerator | | 04/05/00 | 1,920 | | 100.00 | | | 1,920 | 7.00 | SL/HY | 1,920 | 0 |
| GE Freezer-RMR | | 04/07/00 | 532 | | 100.00 | | | 532 | 7.00 | SL/HY | 532 | 0 |
| True Freezer | | 04/12/00 | 2,386 | | 100.00 | | | 2,386 | 7.00 | SL/HY | 2,386 | 0 |
| NPC Dek Roof | | 05/03/00 | 7,232 | | 100.00 | | | 7,232 | 15.00 | SL/HY | 3,696 | 471 |
| RMR Cabin Heat Pump | | 08/15/00 | 2,923 | | 100.00 | | | 2,923 | 10.00 | SL/HY | 2,168 | 302 |
| Isolation Booth | | 09/10/00 | 2,588 | | 100.00 | | | 2,588 | 7.00 | SL/HY | 2,588 | 0 |
| Dishwasher | | 10/01/00 | 3,470 | | 100.00 | | | 3,470 | 7.00 | SL/HY | 3,470 | 0 |
| Waterbed & Trim | | 10/12/00 | 1,935 | | 100.00 | | | 1,935 | 7.00 | SL/HY | 1,935 | 0 |
| Millenium Booth | | 10/13/00 | 52,370 | | 100.00 | | | 52,370 | 20.00 | SL/HY | 18,985 | 2,671 |
| HVAC-Millenium | | 10/15/00 | 975 | | 100.00 | | | 975 | 10.00 | SL/HY | 707 | 107 |
| NPC Carpet | | 11/27/00 | 2,597 | | 100.00 | | | 2,597 | 7.00 | SL/HY | 2,597 | 0 |
| Telephone System | | 12/01/00 | 13,906 | | 100.00 | | | 13,906 | 7.00 | SL/HY | 13,906 | 0 |
| Mirror at RMTT | | 01/12/01 | 457 | | 100.00 | | | 457 | 10.00 | SL/HY | 320 | 39 |
| Weatherize Gatehouse | | 02/14/01 | 2,639 | | 100.00 | | | 2,639 | 10.00 | SL/HY | 1,825 | 233 |
| RMR Cabinet & Back | | 03/19/01 | 490 | | 100.00 | | | 490 | 7.00 | SL/HY | 473 | 17 |
| NPC Tower Glass | | 03/26/01 | 3,350 | | 100.00 | | | 3,350 | 15.00 | SL/HY | 1,507 | 217 |
| NPC Rewire | | 04/18/01 | 3,000 | | 100.00 | | | 3,000 | 10.00 | SL/HY | 2,000 | 286 |
| NPC Septic Repair | | 07/09/01 | 5,150 | | 100.00 | | | 5,150 | 10.00 | SL/HY | 3,348 | 515 |
| 14VAC-Gatehouse | | 07/17/01 | 1,511 | | 100.00 | | | 1,511 | 10.00 | SL/HY | 969 | 155 |
| NPC Deck renovation | | 10/02/01 | 1,696 | | 100.00 | | | 1,696 | 10.00 | SL/HY | 1,060 | 182 |

Code: S = Sold, A = Auto, L = Listed, C = COGS

Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Depreciation and Amortization Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation |
|---------------------------|------|-----------------|--------------------|------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|
| Lateral File - Lynn | | 11/20/01 | 400 | | 100.00 | | | 400 | 10.00 | SL/HY | 243 | 45 |
| John Deere 18S | | 05/01/02 | 941 | | 100.00 | | | 941 | 5.00 | SL/HY | 941 | 0 |
| Carpet 1664 Robets | | 05/07/02 | 4,700 | | 100.00 | | | 4,700 | 5.00 | SL/HY | 4,700 | 0 |
| HVAC NPC West Wing | | 07/22/02 | 3,896 | | 100.00 | | | 3,896 | 10.00 | SL/HY | 2,111 | 397 |
| Refrigerator-RMR | | 07/29/02 | 1,170 | | 100.00 | | | 1,170 | 10.00 | SL/HY | 634 | 119 |
| File Cabinet | | 12/23/02 | 209 | | 100.00 | | | 209 | 5.00 | SL/HY | 209 | 0 |
| Lab - J & J Engineering | | 12/31/02 | 2,865 | | 100.00 | | | 2,865 | 5.00 | SL/HY | 2,865 | 0 |
| HP 1200 Laser Printer | | 01/03/03 | 482 | | 100.00 | | | 482 | 7.00 | SL/HY | 344 | 55 |
| Carpet NPC Dining Room | | 02/06/03 | 3,928 | | 100.00 | | | 3,928 | 7.00 | SL/HY | 2,759 | 468 |
| CHEC Unit in Meditation | | 03/09/03 | 1,275 | | 100.00 | | | 1,275 | 15.00 | SL/HY | 411 | 82 |
| 250 sq ft beded ceiling | | 03/09/03 | 975 | | 100.00 | | | 975 | 15.00 | SL/HY | 314 | 63 |
| AC Compressor | | 06/19/03 | 1,650 | | 100.00 | | | 1,650 | 10.00 | SL/HY | 743 | 165 |
| AC Unit | | 08/07/03 | 1,970 | | 100.00 | | | 1,970 | 10.00 | SL/HY | 870 | 200 |
| 100 gallon LP Hot Water | | 08/18/03 | 4,198 | | 100.00 | | | 4,198 | 10.00 | SL/HY | 1,819 | 433 |
| FM-850 Stereo FM | | 10/07/03 | 1,731 | | 100.00 | | | 1,731 | 5.00 | SL/HY | 1,471 | 260 |
| Carpet | | 02/09/04 | 4,383 | | 100.00 | | | 4,383 | 5.00 | SL/HY | 3,434 | 633 |
| Telephone System | | 03/11/04 | 4,260 | | 100.00 | | | 4,260 | 5.00 | SL/HY | 3,266 | 663 |
| 2003 E350 Club Ford Wagon | A | 03/29/04 | 16,515 | | 100.00 | | | 16,515 | 5.00 | SL/HY | 12,386 | 1,875 |
| Yamaha FLX-7-21 | | 04/14/04 | 1,756 | | 100.00 | | | 1,756 | 5.00 | SL/HY | 1,317 | 293 |
| Tower Renovations | | 07/19/04 | 50,680 | | 100.00 | | | 50,680 | 20.00 | SL/HY | 8,658 | 2,547 |
| Yamaha CDR-HD | | 08/24/04 | 1,087 | | 100.00 | | | 1,087 | 5.00 | SL/HY | 724 | 242 |
| Refrigerator | | 08/31/04 | 479 | | 100.00 | | | 479 | 5.00 | SL/HY | 320 | 106 |
| Refrigerator | | 08/31/04 | 479 | | 100.00 | | | 479 | 5.00 | SL/HY | 320 | 106 |
| Dryer | | 08/31/04 | 448 | | 100.00 | | | 448 | 5.00 | SL/HY | 299 | 99 |
| Range | | 08/31/04 | 388 | | 100.00 | | | 388 | 5.00 | SL/HY | 259 | 86 |
| Washer | | 08/31/04 | 770 | | 100.00 | | | 770 | 5.00 | SL/HY | 513 | 171 |
| Dell Dimension 3000 | | 10/26/04 | 606 | | 100.00 | | | 606 | 5.00 | SL/HY | 384 | 148 |
| Desk (lab) | | 02/20/05 | 346 | | 100.00 | | | 346 | 5.00 | SL/HY | 196 | 60 |
| Washer-Gatehouse | | 02/22/05 | 295 | | 100.00 | | | 295 | 5.00 | SL/HY | 167 | 51 |
| Dryer-Gatehouse | | 02/22/05 | 295 | | 100.00 | | | 295 | 5.00 | SL/HY | 167 | 51 |
| Elec-Range-Gatehouse | | 02/22/05 | 295 | | 100.00 | | | 295 | 5.00 | SL/HY | 167 | 51 |
| Lab Carpet & Vinyl Floor | | 02/28/05 | 1,573 | | 100.00 | | | 1,573 | 7.00 | SL/HY | 637 | 208 |
| Dell 4100MP Projector | | 03/25/05 | 2,266 | | 100.00 | | | 2,266 | 5.00 | SL/HY | 1,246 | 408 |
| Lab Remodel | | 03/31/05 | 931 | | 100.00 | | | 931 | 10.00 | SL/HY | 256 | 90 |
| Dell Equipment | | 04/19/05 | 692 | | 100.00 | | | 692 | 5.00 | SL/HY | 369 | 129 |
| Lab Carpet | | 05/15/05 | 880 | | 100.00 | | | 880 | 7.00 | SL/HY | 336 | 121 |
| Paving | | 08/16/05 | 38,000 | | 100.00 | | | 38,000 | 15.00 | SL/HY | 5,911 | 2,567 |

Code: S = Sold, A = Auto, L = Listed, C = COGS

Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Depreciation and Amortization Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation |
|-------------------------------|------|-----------------|--------------------|------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|
| RMR Roofing | | 09/08/05 | 5,450 | | 100.00 | | | 5,450 | 15.00 | SL/HY | 847 | 368 |
| Dell Computer | | 09/13/05 | 785 | | 100.00 | | | 785 | 5.00 | SL/HY | 366 | 168 |
| Dell Computer | | 09/13/05 | 800 | | 100.00 | | | 800 | 5.00 | SL/HY | 273 | 211 |
| RMR Furniture | | 09/15/05 | 840 | | 100.00 | | | 840 | 7.00 | SL/HY | 280 | 124 |
| Ionic Breeze Machine | | 09/30/05 | 448 | | 100.00 | | | 448 | 5.00 | SL/HY | 202 | 98 |
| NPC Roofing | | 12/08/05 | 4,900 | | 100.00 | | | 4,900 | 15.00 | SL/HY | 681 | 338 |
| QuickBoosk Pro 2006 | | 12/10/05 | 630 | | 100.00 | | | 630 | 3.00 | SL/HY | 438 | 192 |
| Dell Dimension 3100 | | 01/22/06 | 892 | | 100.00 | | | 892 | 5.00 | SL/HY | 342 | 157 |
| 4 Inspirion | | 04/13/06 | 2,197 | | 100.00 | | | 2,197 | 5.00 | SL/HY | 768 | 408 |
| Dell Computer NPC | | 05/18/06 | 626 | | 100.00 | | | 626 | 5.00 | SL/HY | 198 | 122 |
| Gatehouse Fencing | | 06/27/06 | 602 | | 100.00 | | | 602 | 10.00 | SL/HY | 90 | 60 |
| RMR Improvements | | 06/30/06 | 12,115 | | 100.00 | | | 12,115 | 20.00 | SL/HY | 909 | 606 |
| Barn Improvements | | 06/30/06 | 10,282 | | 100.00 | | | 10,282 | 20.00 | SL/HY | 771 | 514 |
| Various Building Improvements | | 07/11/06 | 2,051 | | 100.00 | | | 2,051 | 20.00 | SL/HY | 154 | 103 |
| Various Building Improvements | | 07/19/06 | 3,313 | | 100.00 | | | 3,313 | 20.00 | SL/HY | 235 | 166 |
| Gas Heater | | 07/19/06 | 1,000 | | 100.00 | | | 1,000 | 5.00 | SL/HY | 283 | 205 |
| 2 Dell E6600 Computers | | 08/31/06 | 2,618 | | 100.00 | | | 2,618 | 5.00 | SL/HY | 699 | 548 |
| Meade ETX-125PE | | 10/02/06 | 1,298 | | 100.00 | | | 1,298 | 5.00 | SL/HY | 325 | 278 |
| Dell Option GX 520 | | 11/06/06 | 921 | | 100.00 | | | 921 | 5.00 | SL/HY | 215 | 202 |
| 60" Gas Range | | 05/29/07 | 5,525 | | 100.00 | | | 5,525 | 5.00 | SL/HY | 645 | 1,105 |
| Denon Casette | | 08/07/07 | 1,911 | | 100.00 | | | 1,911 | 5.00 | SL/HY | 159 | 382 |
| Generator | | 08/15/07 | 35,000 | | 100.00 | | | 35,000 | 10.00 | SL/HY | 1,458 | 3,500 |
| Generator | | 09/19/07 | 16,771 | | 100.00 | | | 16,771 | 10.00 | SL/HY | 559 | 1,677 |
| Upright Freezer | | 09/19/07 | 648 | | 100.00 | | | 648 | 5.00 | SL/HY | 43 | 130 |
| Dual Core 3050 | | 12/04/07 | 1,613 | | 100.00 | | | 1,613 | 3.00 | SL/HY | 45 | 538 |
| Office Equipment | | 12/04/07 | 2,168 | | 100.00 | | | 2,168 | 5.00 | SL/HY | 36 | 434 |
| Generator | | 12/04/07 | 2,589 | | 100.00 | | | 2,589 | 10.00 | SL/HY | 22 | 259 |
| Windows for Patio | | 12/20/07 | 3,962 | | 100.00 | | | 3,962 | 20.00 | SL/HY | 8 | 198 |
| Mattresses | | 12/21/07 | 10,000 | | 100.00 | | | 10,000 | 7.00 | SL/HY | 119 | 1,429 |
| Mattresses | | 12/21/07 | 6,884 | | 100.00 | | | 6,884 | 7.00 | SL/HY | 82 | 983 |
| SUBTOTAL PRIOR YEAR | | | 2,429,578 | 0 | | 0 | 0 | 2,429,578 | | | 1,162,020 | 130,118 |
| TOTALS | | | 2,763,363 | 0 | | 0 | 0 | 2,763,363 | | | 1,162,020 | 139,261 |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

Code: S = Sold, A = Auto, L = Listed, C = COGS

Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Alternative Minimum Tax Depreciation Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation | Adjustment/ Preference |
|------------------------------|------|-----------------|--------------------|----------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|------------------------|
| DEPRECIATION | | | | | | | | | | | | | |
| DFH-Office, Computer | | 01/30/08 | 1,088 | | 100.00 | | | 1,088 | 5.00 | SL/MQ | | 190 | 0. |
| DFH-Laserjet Printer | | 02/18/08 | 945 | | 100.00 | | | 945 | 5.00 | SL/MQ | | 165 | 0. |
| NPC-Property Improvem | | 03/11/08 | 16,893 | | 100.00 | | | 16,893 | 20.00 | SL/MQ | | 739 | 0. |
| Restaurant Range | | 03/24/08 | 5,261 | | 100.00 | | | 5,261 | 10.00 | SL/MQ | | 460 | 0. |
| LawnMower | | 04/23/08 | 5,144 | | 100.00 | | | 5,144 | 10.00 | SL/MQ | | 322 | 0. |
| Computer XPS | | 05/20/08 | 1,183 | | 100.00 | | | 1,183 | 5.00 | SL/MQ | | 148 | 0. |
| General Property Impr | | 06/23/08 | 59,686 | | 100.00 | | | 59,686 | 20.00 | SL/MQ | | 1,865 | 0. |
| Lab-Office Computers/ | | 07/09/08 | 2,660 | | 100.00 | | | 2,660 | 10.00 | SL/MQ | | 100 | 0. |
| DFH Conference Equip | | 07/22/08 | 10,519 | | 100.00 | | | 10,519 | 10.00 | SL/MQ | | 394 | 0. |
| Lab Offices | | 09/22/08 | 5,434 | | 100.00 | | | 5,434 | 10.00 | SL/MQ | | 204 | 0. |
| Lab-Office, Property | | 09/30/08 | 13,531 | | 100.00 | | | 13,531 | 20.00 | SL/MQ | | 254 | 0. |
| DFH-Property Improvem | | 10/21/08 | 33,016 | | 100.00 | | | 33,016 | 20.00 | SL/MQ | | 206 | 0. |
| NPC-Video Equipment | | 11/04/08 | 5,020 | | 100.00 | | | 5,020 | 10.00 | SL/MQ | | 63 | 0. |
| Lab-Office Equipment | | 11/25/08 | 4,467 | | 100.00 | | | 4,467 | 10.00 | SL/MQ | | 56 | 0. |
| Gate House-Property I | | 12/15/08 | 10,467 | | 100.00 | | | 10,467 | 20.00 | SL/MQ | | 65 | 0. |
| NPC-Kitchen | | 12/31/08 | 3,943 | | 100.00 | | | 3,943 | 10.00 | SL/MQ | | 49 | 0. |
| TMI Website | | 12/31/08 | 154,528 | | 100.00 | | | 154,528 | 5.00 | SL/MQ | | 3,863 | 0. |
| SUBTOTAL CURRENT YEAR | | | 333,785 | 0 | | 0 | 0 | 333,785 | | | 0 | 9,143 | 0. |
| | | | | | | | | | | | | | |
| Air Conditioning | | 07/01/87 | 9,485 | | 100.00 | | | 9,485 | 40.00 | SL/MM | | 237 | 194. |
| Fire Symm | | 08/13/89 | 1,869 | | 100.00 | | | 1,869 | 40.00 | SL/MM | | 47 | 32. |
| Air Conditioning | | 11/19/89 | 2,795 | | 100.00 | | | 2,795 | 40.00 | SL/MM | | 70 | 47. |
| Bl Ridge Phones | | 06/15/90 | 1,195 | | 100.00 | | | 1,195 | 40.00 | SL/MM | | 30 | 19. |
| Center Buildings | | 09/30/94 | 520,980 | | 100.00 | | | 520,980 | 50.00 | SL/HY | | 10,420 | 10,872. |
| Center Buildings | | 02/01/95 | 378,006 | | 100.00 | | | 378,006 | 50.00 | SL/HY | | 7,560 | 7,056. |
| Lab Bldg Roof | | 05/30/95 | 1,730 | | 100.00 | | | 1,730 | 15.00 | SL/HY | | 116 | -4. |
| Lab Heating System | | 11/09/95 | 3,462 | | 100.00 | | | 3,462 | 15.00 | SL/HY | | 230 | 32. |
| Heat AC | | 04/24/96 | 2,920 | | 100.00 | | | 2,920 | 15.00 | SL/HY | | 195 | -10. |
| Water Heater | | 12/01/97 | 737 | | 100.00 | | | 737 | 10.00 | SL/HY | | 0 | 0. |
| Baby Grand Piano | | 07/08/98 | 1,306 | | 100.00 | | | 1,306 | 10.00 | SL/HY | | 65 | 0. |
| NPC Brick Walkway | | 08/25/98 | 900 | | 100.00 | | | 900 | 10.00 | SL/HY | | 45 | 15. |
| RMRC Pool and Landscape | | 11/01/98 | 41,840 | | 100.00 | | | 41,840 | 10.00 | SL/HY | | 2,092 | 1,394. |
| RMRC Buildings | | 11/01/98 | 850,492 | | 100.00 | | | 850,492 | 20.00 | SL/HY | | 42,524 | 1,351. |
| NPC Deck Addition | | 11/02/98 | 3,705 | | 100.00 | | | 3,705 | 10.00 | SL/HY | | 185 | 124. |
| Gatehouse Deck | | 12/30/98 | 4,725 | | 100.00 | | | 4,725 | 10.00 | SL/HY | | 236 | 237. |
| NPC Landscaping | | 12/31/98 | 1,037 | | 100.00 | | | 1,037 | 10.00 | SL/HY | | 52 | 51. |

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Form 4562

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Alternative Minimum Tax Depreciation Report

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2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation | Adjustment/ Preference |
|-----------------------|------|-----------------|--------------------|------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|------------------------|
| DR Round Pedestal | | 02/26/99 | 1,367 | | 100.00 | | | 1,367 | 10.00 | SL/HY | | 137 | -31. |
| Seed on Pool Pump | | 03/29/99 | 1,630 | | 100.00 | | | 1,630 | 10.00 | SL/HY | | 163 | -27. |
| Beverage Air Refriger | | 03/29/99 | 2,482 | | 100.00 | | | 2,482 | 10.00 | SL/HY | | 249 | -42. |
| DFH Roof | | 04/12/99 | 4,050 | | 100.00 | | | 4,050 | 15.00 | SL/HY | | 270 | -10. |
| DFH Siding | | 05/15/99 | 2,933 | | 100.00 | | | 2,933 | 15.00 | SL/HY | | 196 | -6. |
| Fox Den Sect Couch | | 06/07/99 | 6,156 | | 100.00 | | | 6,156 | 10.00 | SL/HY | | 615 | -34. |
| Remodel GH | | 06/15/99 | 6,209 | | 100.00 | | | 6,209 | 10.00 | SL/HY | | 621 | -34. |
| Orme Fence Gates | | 07/27/99 | 853 | | 100.00 | | | 853 | 10.00 | SL/HY | | 85 | 5. |
| Lab Siding | | 09/03/99 | 4,000 | | 100.00 | | | 4,000 | 15.00 | SL/HY | | 266 | 7. |
| Gatehouse Bldg | | 12/06/99 | 129,958 | | 100.00 | | | 129,958 | 20.00 | SL/HY | | 6,498 | 235. |
| GH Roof | | 12/22/99 | 4,500 | | 100.00 | | | 4,500 | 15.00 | SL/HY | | 300 | 23. |
| New GH Siding | | 12/22/99 | 9,517 | | 100.00 | | | 9,517 | 15.00 | SL/HY | | 634 | 49. |
| NPC Siding | | 02/11/00 | 5,950 | | 100.00 | | | 5,950 | 15.00 | SL/HY | | 397 | -22. |
| NPC Roof | | 03/07/00 | 5,811 | | 100.00 | | | 5,811 | 15.00 | SL/HY | | 387 | -17. |
| NPC Skylight | | 03/08/00 | 940 | | 100.00 | | | 940 | 7.00 | SL/HY | | 0 | 0. |
| NPC Capt Chairs | | 04/01/00 | 5,197 | | 100.00 | | | 5,197 | 7.00 | SL/HY | | 0 | 0. |
| RMR Carpet | | 04/01/00 | 3,061 | | 100.00 | | | 3,061 | 7.00 | SL/HY | | 0 | 0. |
| True Refrigerator | | 04/05/00 | 1,920 | | 100.00 | | | 1,920 | 7.00 | SL/HY | | 0 | 0. |
| GE Freezer-RMR | | 04/07/00 | 532 | | 100.00 | | | 532 | 7.00 | SL/HY | | 0 | 0. |
| True Freezer | | 04/12/00 | 2,386 | | 100.00 | | | 2,386 | 7.00 | SL/HY | | 0 | 0. |
| NPC Dek Roof | | 05/03/00 | 7,232 | | 100.00 | | | 7,232 | 15.00 | SL/HY | | 482 | -11. |
| RMR Cabin Heat Pump | | 08/15/00 | 2,923 | | 100.00 | | | 2,923 | 10.00 | SL/HY | | 292 | 10. |
| Isolation Booth | | 09/10/00 | 2,588 | | 100.00 | | | 2,588 | 7.00 | SL/HY | | 0 | 0. |
| Dishwasher | | 10/01/00 | 3,470 | | 100.00 | | | 3,470 | 7.00 | SL/HY | | 0 | 0. |
| Waterbed & Trim | | 10/12/00 | 1,935 | | 100.00 | | | 1,935 | 7.00 | SL/HY | | 0 | 0. |
| Millenium Booth | | 10/13/00 | 52,370 | | 100.00 | | | 52,370 | 20.00 | SL/HY | | 2,618 | 53. |
| HVAC-Millenium | | 10/15/00 | 975 | | 100.00 | | | 975 | 10.00 | SL/HY | | 98 | 9. |
| NPC Carpet | | 11/27/00 | 2,597 | | 100.00 | | | 2,597 | 7.00 | SL/HY | | 0 | 0. |
| Telephone System | | 12/01/00 | 13,906 | | 100.00 | | | 13,906 | 7.00 | SL/HY | | 0 | 0. |
| Mirror at RMTT | | 01/12/01 | 457 | | 100.00 | | | 457 | 10.00 | SL/HY | | 45 | -6. |
| Weatherize Gatehouse | | 02/14/01 | 2,639 | | 100.00 | | | 2,639 | 10.00 | SL/HY | | 264 | -31. |
| RMR Cabinet & Back | | 03/19/01 | 490 | | 100.00 | | | 490 | 7.00 | SL/HY | | 35 | -18. |
| NPC Tower Glass | | 03/26/01 | 3,350 | | 100.00 | | | 3,350 | 15.00 | SL/HY | | 224 | -7. |
| NPC Rewire | | 04/18/01 | 3,000 | | 100.00 | | | 3,000 | 10.00 | SL/HY | | 300 | -14. |
| NPC Septic Repair | | 07/09/01 | 5,150 | | 100.00 | | | 5,150 | 10.00 | SL/HY | | 515 | 0. |
| 14VAC-Gatehouse | | 07/17/01 | 1,511 | | 100.00 | | | 1,511 | 10.00 | SL/HY | | 151 | 4. |
| NPC Deck renovation | | 10/02/01 | 1,696 | | 100.00 | | | 1,696 | 10.00 | SL/HY | | 169 | 13. |

Code: S = Sold, A = Auto, L = Listed, C = COGS, P = Passive

Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Alternative Minimum Tax Depreciation Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation | Adjustment/ Preference |
|-------------------------|------|-----------------|--------------------|------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|------------------------|
| Lateral File - Lynn | | 11/20/01 | 400 | | 100.00 | | | 400 | 10.00 | SL/HY | | 40 | 5. |
| John Deere 18S | | 05/01/02 | 941 | | 100.00 | | | 941 | 5.00 | SL/HY | | 0 | 0. |
| Carpet 1664 Robets | | 05/07/02 | 4,700 | | 100.00 | | | 4,700 | 5.00 | SL/HY | | 0 | 0. |
| HVAC NPC West Wing | | 07/22/02 | 3,896 | | 100.00 | | | 3,896 | 10.00 | SL/HY | | 390 | 7. |
| Refrigerator-RMR | | 07/29/02 | 1,170 | | 100.00 | | | 1,170 | 10.00 | SL/HY | | 117 | 2. |
| File Cabinet | | 12/23/02 | 209 | | 100.00 | | | 209 | 5.00 | SL/HY | | 0 | 0. |
| Lab - J & J Engineering | | 12/31/02 | 2,865 | | 100.00 | | | 2,865 | 5.00 | SL/HY | | 0 | 0. |
| HP 1200 Laser Printer | | 01/03/03 | 482 | | 100.00 | | | 482 | 7.00 | SL/HY | | 69 | -14. |
| Carpet NPC Dining Room | | 02/06/03 | 3,928 | | 100.00 | | | 3,928 | 7.00 | SL/HY | | 561 | -93. |
| CHEC Unit in Meditation | | 03/09/03 | 1,275 | | 100.00 | | | 1,275 | 15.00 | SL/HY | | 85 | -3. |
| 250 sq ft beded ceiling | | 03/09/03 | 975 | | 100.00 | | | 975 | 15.00 | SL/HY | | 65 | -2. |
| AC Compressor | | 06/19/03 | 1,650 | | 100.00 | | | 1,650 | 10.00 | SL/HY | | 165 | 0. |
| AC Unit | | 08/07/03 | 1,970 | | 100.00 | | | 1,970 | 10.00 | SL/HY | | 197 | 3. |
| 100 gallon LP Hot Water | | 08/18/03 | 4,198 | | 100.00 | | | 4,198 | 10.00 | SL/HY | | 420 | 13. |
| FM-850 Stereo FM | | 10/07/03 | 1,731 | | 100.00 | | | 1,731 | 5.00 | SL/HY | | 173 | 87. |
| Carpet | | 02/09/04 | 4,383 | | 100.00 | | | 4,383 | 5.00 | SL/HY | | 877 | -244. |
| Telephone System | | 03/11/04 | 4,260 | | 100.00 | | | 4,260 | 5.00 | SL/HY | | 852 | -189. |
| 2003 E350 Club Ford W | A | 03/29/04 | 16,515 | | 100.00 | | | 16,515 | 5.00 | SL/HY | | 1,875 | 0. |
| Yamaha FLX-7-21 | | 04/14/04 | 1,756 | | 100.00 | | | 1,756 | 5.00 | SL/HY | | 351 | -58. |
| Tower Renovations | | 07/19/04 | 50,680 | | 100.00 | | | 50,680 | 20.00 | SL/HY | | 2,534 | 13. |
| Yamaha CDR-HD | | 08/24/04 | 1,087 | | 100.00 | | | 1,087 | 5.00 | SL/HY | | 217 | 25. |
| Refrigerator | | 08/31/04 | 479 | | 100.00 | | | 479 | 5.00 | SL/HY | | 95 | 11. |
| Refrigerator | | 08/31/04 | 479 | | 100.00 | | | 479 | 5.00 | SL/HY | | 95 | 11. |
| Dryer | | 08/31/04 | 448 | | 100.00 | | | 448 | 5.00 | SL/HY | | 89 | 10. |
| Range | | 08/31/04 | 388 | | 100.00 | | | 388 | 5.00 | SL/HY | | 77 | 9. |
| Washer | | 08/31/04 | 770 | | 100.00 | | | 770 | 5.00 | SL/HY | | 154 | 17. |
| Dell Dimension 3000 | | 10/26/04 | 606 | | 100.00 | | | 606 | 5.00 | SL/HY | | 121 | 27. |
| Desk (lab) | | 02/20/05 | 346 | | 100.00 | | | 346 | 5.00 | SL/HY | | 69 | -9. |
| Washer-Gatehouse | | 02/22/05 | 295 | | 100.00 | | | 295 | 5.00 | SL/HY | | 59 | -8. |
| Dryer-Gatehouse | | 02/22/05 | 295 | | 100.00 | | | 295 | 5.00 | SL/HY | | 59 | -8. |
| Elec-Range-Gatehouse | | 02/22/05 | 295 | | 100.00 | | | 295 | 5.00 | SL/HY | | 59 | -8. |
| Lab Carpet & Vinyl Fl | | 02/28/05 | 1,573 | | 100.00 | | | 1,573 | 7.00 | SL/HY | | 225 | -17. |
| Dell 4100MP Projector | | 03/25/05 | 2,266 | | 100.00 | | | 2,266 | 5.00 | SL/HY | | 453 | -45. |
| Lab Remodel | | 03/31/05 | 931 | | 100.00 | | | 931 | 10.00 | SL/HY | | 93 | -3. |
| Dell Equipment | | 04/19/05 | 692 | | 100.00 | | | 692 | 5.00 | SL/HY | | 138 | -9. |
| Lab Carpet | | 05/15/05 | 880 | | 100.00 | | | 880 | 7.00 | SL/HY | | 126 | -5. |
| Paving | | 08/16/05 | 38,000 | | 100.00 | | | 38,000 | 15.00 | SL/HY | | 2,533 | 34. |

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Form 4562

The Monroe Institute
Form 990 - / Form 990EZ

Alternative Minimum Tax Depreciation Report

Tax Year 2008
► Keep for your records

2008

54-1824173

| Asset Description | Code | Date in Service | Cost (net of land) | Land | Business Use % | Section 179 | Special Depreciation Allowance | Depreciable Basis | Life | Method/ Convention | Prior Depreciation | Current Depreciation | Adjustment/ Preference |
|------------------------|------|-----------------|--------------------|------|----------------|-------------|--------------------------------|-------------------|-------|--------------------|--------------------|----------------------|------------------------|
| RMR Roofing | | 09/08/05 | 5,450 | | 100.00 | | | 5,450 | 15.00 | SL/HY | | 363 | 5. |
| Dell Computer | | 09/13/05 | 785 | | 100.00 | | | 785 | 5.00 | SL/HY | | 157 | 11. |
| Dell Computer | | 09/13/05 | 800 | | 100.00 | | | 800 | 5.00 | SL/HY | | 160 | 51. |
| RMR Furniture | | 09/15/05 | 840 | | 100.00 | | | 840 | 7.00 | SL/HY | | 120 | 4. |
| Ionic Breeze Machine | | 09/30/05 | 448 | | 100.00 | | | 448 | 5.00 | SL/HY | | 90 | 8. |
| NPC Roofing | | 12/08/05 | 4,900 | | 100.00 | | | 4,900 | 15.00 | SL/HY | | 327 | 11. |
| QuickBoosk Pro 2006 | | 12/10/05 | 630 | | 100.00 | | | 630 | 3.00 | SL/HY | | 105 | 87. |
| Dell Dimension 3100 | | 01/22/06 | 892 | | 100.00 | | | 892 | 5.00 | SL/HY | | 179 | -22. |
| 4 Inspirion | | 04/13/06 | 2,197 | | 100.00 | | | 2,197 | 5.00 | SL/HY | | 439 | -31. |
| Dell Computer NPC | | 05/18/06 | 626 | | 100.00 | | | 626 | 5.00 | SL/HY | | 125 | -3. |
| Gatehouse Fencing | | 06/27/06 | 602 | | 100.00 | | | 602 | 10.00 | SL/HY | | 60 | 0. |
| RMR Improvements | | 06/30/06 | 12,115 | | 100.00 | | | 12,115 | 20.00 | SL/HY | | 606 | 0. |
| Barn Improvements | | 06/30/06 | 10,282 | | 100.00 | | | 10,282 | 20.00 | SL/HY | | 514 | 0. |
| Various Building Impr | | 07/11/06 | 2,051 | | 100.00 | | | 2,051 | 20.00 | SL/HY | | 103 | 0. |
| Various Building Impr | | 07/19/06 | 3,313 | | 100.00 | | | 3,313 | 20.00 | SL/HY | | 166 | 0. |
| Gas Heater | | 07/19/06 | 1,000 | | 100.00 | | | 1,000 | 5.00 | SL/HY | | 200 | 5. |
| 2 Dell E6600 Computers | | 08/31/06 | 2,618 | | 100.00 | | | 2,618 | 5.00 | SL/HY | | 523 | 25. |
| Meade ETX-125PE | | 10/02/06 | 1,298 | | 100.00 | | | 1,298 | 5.00 | SL/HY | | 259 | 19. |
| Dell Option GX 520 | | 11/06/06 | 921 | | 100.00 | | | 921 | 5.00 | SL/HY | | 184 | 18. |
| 60" Gas Range | | 05/29/07 | 5,525 | | 100.00 | | | 5,525 | 5.00 | SL/HY | 553 | 1,105 | 0. |
| Denon Casette | | 08/07/07 | 1,911 | | 100.00 | | | 1,911 | 5.00 | SL/HY | 191 | 382 | 0. |
| Generator | | 08/15/07 | 35,000 | | 100.00 | | | 35,000 | 10.00 | SL/HY | 1,750 | 3,500 | 0. |
| Generator | | 09/19/07 | 16,771 | | 100.00 | | | 16,771 | 10.00 | SL/HY | 839 | 1,677 | 0. |
| Upright Freezer | | 09/19/07 | 648 | | 100.00 | | | 648 | 5.00 | SL/HY | 65 | 130 | 0. |
| Dual Core 3050 | | 12/04/07 | 1,613 | | 100.00 | | | 1,613 | 3.00 | SL/HY | 269 | 538 | 0. |
| Office Equipment | | 12/04/07 | 2,168 | | 100.00 | | | 2,168 | 5.00 | SL/HY | 217 | 434 | 0. |
| Generator | | 12/04/07 | 2,589 | | 100.00 | | | 2,589 | 10.00 | SL/HY | 129 | 259 | 0. |
| Windows for Patio | | 12/20/07 | 3,962 | | 100.00 | | | 3,962 | 20.00 | SL/HY | 99 | 198 | 0. |
| Mattresses | | 12/21/07 | 10,000 | | 100.00 | | | 10,000 | 7.00 | SL/HY | 714 | 1,429 | 0. |
| Mattresses | | 12/21/07 | 6,884 | | 100.00 | | | 6,884 | 7.00 | SL/HY | 492 | 983 | 0. |
| SUBTOTAL PRIOR YEAR | | | 2,429,578 | 0 | | 0 | 0 | 2,429,578 | | | 5,318 | 108,863 | 21,255. |
| TOTALS | | | 2,763,363 | 0 | | 0 | 0 | 2,763,363 | | | 5,318 | 118,006 | 21,255. |

Code: S = Sold, A = Auto, L = Listed, C = COGS, P = Passive

**IRS e-file Signature Authorization
for an Exempt Organization**

For calendar year 2008, or fiscal year beginning _____, 2008, and ending _____.

▶ **Do not send to the IRS. Keep for your records.**
▶ **See instructions.**

2008

Department of the Treasury
Internal Revenue Service

Name of exempt organization

The Monroe Institute

Employer identification number

54-1824173

Name and title of officer

Frederick H. Atwater

Frederick H. Atwater

Part I Tax Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount from the return if any. If you check the box on line **1a, 2a, 3a, 4a, or 5a**, below, and the amount on that line for the return for which you are filing this form was blank, then leave line **1b, 2b, 3b, 4b, or 5b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than 1 line in Part I.

| | | | |
|--|---------------------------------------|--|-----------------------------|
| 1a Form 990 check here | ▶ <input checked="" type="checkbox"/> | b Total revenue , if any (Form 990, line 12) | 1b <u>2,727,244.</u> |
| 2a Form 990-EZ check here | ▶ <input type="checkbox"/> | b Total revenue , if any (Form 990-EZ, line 9) | 2b _____ |
| 3a Form 1120-POL check here | ▶ <input type="checkbox"/> | b Total tax (Form 1120-POL, line 22) | 3b _____ |
| 4a Form 990-PF check here | ▶ <input type="checkbox"/> | b Tax based on investment income (Form 990-PF, Part VI, line 5) | 4b _____ |
| 5a Form 8868 check here | ▶ <input type="checkbox"/> | b Balance Due (Form 8868, line 3c) | 5b _____ |

Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2008 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS **(a)** an acknowledgement of receipt or reason for rejection of the transmission, **(b)** an indication of any refund offset, **(c)** the reason for any delay in processing the return or refund, and **(d)** the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

I authorize _____ to enter my PIN as my signature
ERO firm name Enter five numbers, but do not enter all zeros

on the organization's tax year 2008 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2008 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ _____ Date ▶ 08/12/2009

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2008 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ _____ Date ▶ 08/12/2009

**ERO Must Retain This Form – See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So**

IRS e-file Authentication Statement

2008

Keep for your records

Table with 2 columns: Name(s) Shown on Return (The Monroe Institute) and Employer ID Number (54-1824173)

A - Practitioner PIN Authorization

Please indicate how the taxpayer(s) PIN(s) are entered into the program.

Form with fields for Officer(s) entered PIN(s) and ERO entered Officer's PIN, with checkboxes for 'X' and '0'.

B - Signature of Electronic Return Originator

ERO Declaration:

I declare that the information contained in this electronic tax return is the information furnished to me by the Corporation. If the Exempt Organization furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the Exempt Organization.

I am signing this Tax Return by entering my PIN below.

ERO's PIN (EFIN followed by any 5 numbers) EFIN 546462 Self-Select PIN 02427

C - Signature of Officer

Perjury Statement:

Under penalties of perjury, I declare that I am an officer of the above Exempt Organization and that I have examined a copy of the Exempt Organization's 2008 electronic income tax return and accompanying schedules and statements and to the best of my knowledge and belief, it is true, correct, and complete.

Consent to Disclosure:

I consent to allow my electronic return originator (ERO), transmitter, or intermediate service provider to send the Exempt Organization's return to the IRS and to receive from the IRS (a) and acknowledgement of receipt or reason for rejection of the transmission, (b) an indication of any refund offset, (c) the reason for any delay in processing the return or refund, and (d) the date of any refund.

Electronic Funds Withdrawal Consent (if applicable):

I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the Exempt Organization's Federal taxes owed on this return, and the financial institution to debit the entry to this account.

I am signing this Tax Return and Electronic Funds Withdrawal Consent, if applicable, by entering my self-selected PIN below.

Officer's PIN 12345 Date 08/12/2009

Electronic Filing Information Worksheet

► Keep for your records

2008

Name(s) shown on return

The Monroe Institute

Identifying number

54-1824173

Part I – Electronic Return Originator Information

The ERO Information below will automatically calculate based on the preparer code entered on the return. If the ERO is not the same as the preparer designated on the return, enter a Preparer Code from the Firm/Preparer Info to assign an ERO to this return.

Check to use ERO name instead of firm name in electronic file and on Forms 8453, 8878A, & 8879 ►

| | | |
|---|--|-----------------------|
| Firm Name | Social Security Number or PTIN | |
| ACCOUNTING CONSULTANTS, INC. | _____ | |
| Name | Employer Identification Number | |
| Mike Kunkel | 54-2040671 | |
| Address | Phone Number | Fax Number |
| 2771 ROCKFISH VALLEY HWY P O BOX 436 | (434) 361-9080 | (434) 361-0121 |
| City | State | ZIP Code |
| NELLYSFORD | VA | 22958-2309 |
| Country | Electronic Filers Identification Number (EFIN) | |
| _____ | 546462 | |
| _____ | E-mail Address | |
| _____ | acimike@embarqmai.com | |

Enter a Preparer Code from the Firm/Preparer Info to assign a different ERO to this return. (See Help) _____

Part II – Paid Preparer Information

| | | |
|---|--------------------------------|-----------------------|
| Firm Name | Social Security Number or PTIN | |
| ACCOUNTING CONSULTANTS, INC. | _____ | |
| Name | Employer Identification Number | |
| Mike Kunkel | 54-2040671 | |
| Address | Phone Number | Fax Number |
| 2771 ROCKFISH VALLEY HWY P O BOX 436 | (434) 361-9080 | (434) 361-0121 |
| City | State | ZIP Code |
| NELLYSFORD | VA | 22958-2309 |
| Country | E-mail Address | |
| _____ | acimike@embarqmai.com | |

If your firm is **ONLY** the ERO and the return being transmitted was not prepared by your firm, enter a preparer code from the Alternative EF Preparer Information to assign a paid preparer. (See Help) ... ► _____

Part IV – Amended Returns

Enter the payment date to withdraw tax payment ► _____
Amount you are paying with the amended return ► _____

Check this box to file another **amended return** electronically

Schedule D, Supplemental Financial Statements

Part X Other Liabilities

| (a) Description of Liability | Beg of Year Amount (990-EZ ONLY) | (b) End of Year Amount |
|--|--|-------------------------------------|
| Bond Deduction | | 250. |
| Xmas Club | | 880. |

Supporting Statement of:

Form 990 p 11/Line 24, column (A)

| Description | Amount |
|-----------------------------|-----------------|
| Interstate Industries, Inc. | 198,662. |
| Total | <u>198,662.</u> |