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Application for Recognition of Exemption

Under Section 501(c)(3) of the Internal Revenue Code

For Paperwork Reduction Act Notice, see page 1 of the instructions.

To be filed in the tax district for the area in which the organization has its principal office or place of business.

This application, when properly completed, constitutes the notice required under section 508(a) of the Internal Revenue Code so that an applicant may be treated as described in section 501(c)(3) of the Code, and the notice required under section 508(b) for an organization claiming not to be a private foundation within the meaning of section 509(a). (Read the instructions for each part carefully before making any entries.) If required information, a conformed copy of the organizing and operational documents, or financial data are not furnished, the application will not be considered on its merits and the organization will be notified accordingly. Do not file this application if the applicant has no organizing instrument (see Part II).

Part I.—Identification

1 Full name of organization The Ronald Reagan Presidential Foundation		2 Employer identification number (If none, see instructions) 77-0054631	
3(a) Address (number and street) 801 Welch Road, Suite 101		Check here if applying under section: <input type="checkbox"/> 501(e) <input type="checkbox"/> 501(f)	
3(b) City or town, State, and Zip code Palo Alto, CA 94304		4 Name and phone number of person to be contacted Richard T. Burress (415) 497-2063	
5 Month the annual accounting period ends December	6 Date incorporated or formed February 27, 1985	7 Activity codes 915 124 061	
8 Has the organization filed Federal income tax returns or exempt organization information returns? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," state the form number(s), years filed, and Internal Revenue office where filed.			

Part II.—Type of Entity and Organizational Document (see instructions)

Check the applicable entity box below and attach a conformed copy of the organization's organizing document and bylaws as indicated for each entity.
 Corporation—Articles of incorporation and bylaws. Trust—Trust indenture. Other—Constitution or articles of association and bylaws.

Part III.—Activities and Operational Information

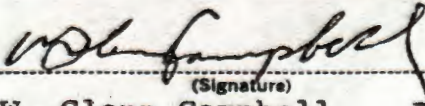
1 What are or will be the organization's sources of financial support? List in order of size.

Sources of financial support include anticipated contributions from individuals, foundations and business organizations interested in supporting the construction of a Presidential library and a museum, and the construction, maintenance, operation and supervision of a Center for Public Affairs and in supporting the study of the Presidency and public affairs.

2 Describe the organization's fund-raising program, both actual and planned, and explain to what extent it has been put into effect. (Include details of fund-raising activities such as selective mailings, formation of fund-raising committees, use of professional fund raisers, etc.) Attach representative copies of solicitations for financial support.

Fund raising for the Foundation will be carried on by the Trustees and by other individuals of public stature who will be associated with the Foundation. Activities will include solicitation of individual contributions, sponsoring fund raising dinners and similar events. [See Attachment A]

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and I have examined this application, including the accompanying statements, and to the best of my knowledge it is true, correct, and complete.


 (Signature)
W. Glenn Campbell

Chairman of Board of Foundation **March 4, 1985**
 (Title or authority of signer) (Date)

Part III.—Activities and Operational Information (Continued)

3 Give a detailed narrative description of the organization's past, present, and proposed future activities, and the purposes for which it was formed. The narrative should identify the specific benefits, services, or products the organization has provided or will provide. If the organization is not fully operational, explain what stage of development its activities have reached, what further steps remain for it to become fully operational, and when such further steps will take place. (Do not state the purposes and activities of the organization in general terms or repeat the language of the organizational documents.) If the organization is a school, hospital, or medical research organization, include enough information in your description to clearly show that the organization meets the definition of that particular activity that is contained in the instructions for Part VI-A.

The Ronald Reagan Presidential Foundation was incorporated on February 27, 1985, as a California nonprofit public benefit corporation. It has been formed to raise the money necessary to design and construct a Presidential library and museum that will house and maintain the papers, records and documents of the Reagan Presidency, and a Center for Public Affairs that will study the office of the Presidency and other public affairs.

No programs or activities are yet carried on, as the corporation has just now been formed. However, once it is fully operational, approximately April 1, 1985, it will engage in fund raising activities, supervise the design and construction of a Presidential library and museum and a Center for Public Affairs. Once the construction and fund raising have been completed, the Foundation will supervise and direct the operation and programs of the Center.

The Foundation will establish, raise and administer an endowment fund that will be used to support certain activities of the Presidential library and the activities and scholarly work of the Center for Public Affairs.

[See Attachment B]

4 The membership of the organization's governing body is:

(a) Names, addresses, and titles of officers, directors, trustees, etc. All listed are Trustees; offices held are shown:	(b) Annual compensation
W. Glenn Campbell, Chairman, 26915 Alejandro Dr., Los Altos Hills, CA 94022; Edwin Meese III, Vice Chairman, 1075 Spring Hill Rd., McLean, VA 22102; Martin C. Anderson, Secretary, 121 Degas Rd., Portola Valley, CA 94025; William P. Clark, Treasurer, P.O. Box 272 Paso Robles, CA 93466 . Additional Trustees are: Michael K. Deaver, 4521 Dexter Ave., N.W. Washington, D.C. 20007 ; John S. Herrington, 1104 Waverley Way, McLean, VA 22101; Ronald P. Reagan,	Mr. Campbell - None Mr. Meese - None Mr. Anderson - None Mr. Clark - None Mr. Deaver - None Mr. Herrington - None Mr. Reagan - None Mr. Smith - None
William French Smith, 1256 Oak Grove Avenue San Marino, CA 91108	

Part III.—Activities and Operational Information (Continued)

4 (c) Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials? Yes No
If "Yes," name those persons and explain the basis of their selection or appointment.

(d) Are any members of the organization's governing body "disqualified persons" with respect to the organization (other than by reason of being a member of the governing body) or do any of the members have either a business or family relationship with "disqualified persons?" (See specific instruction 4(d).) . . . Yes No
If "Yes," explain.

(e) Have any members of the organization's governing body assigned income or assets to the organization, or is it anticipated that any current or future member of the governing body will assign income or assets to the organization? Yes No
If "Yes," attach a complete explanation stating which applies and including copies of any assignments plus a list of items assigned.

5 Does the organization control or is it controlled by any other organization? Yes No
Is the organization the outgrowth of another organization, or does it have a special relationship to another organization by reason of interlocking directorates or other factors? Yes No
If either of these questions is answered "Yes," explain.

6 Is the organization financially accountable to any other organization? Yes No
If "Yes," explain and identify the other organization. Include details concerning accountability or attach copies of reports if any have been submitted.

7 (a) What assets does the organization have that are used in the performance of its exempt function? (Do not include property producing investment income.) If any assets are not fully operational, explain their status, what additional steps remain to be completed, and when such final steps will be taken. At the present, no assets are held by the Foundation. As soon as the Foundation becomes operational, contributions to cover the cost of construction, endowment fund and operations will be solicited.
(b) To what extent have you used, or do you plan to use contributions as an endowment fund, i.e., hold contributions to produce income for the support of your exempt activities? There will be an estimated 40 million dollar endowment fund that will be raised through solicitation of contributions and used to support activities of the Library and Center.

8 Will any of the organization's facilities be managed by another organization or individual under a contractual agreement? Yes No
If "Yes," attach a copy of each contract and explain the relationship between the applicant and each of the other parties.

Part III.—Activities and Operational Information (Continued)

9 (a) Have the recipients been required or will they be required to pay for the organization's benefits, services, or products? Yes No
If "Yes," explain and show how the charges are determined.

(b) Does or will the organization limit its benefits, services, or products to specific classes of individuals? . Yes No
If "Yes," explain how the recipients or beneficiaries are or will be selected.

10 Is the organization a membership organization? Yes No
If "Yes," complete the following:

(a) Describe the organization's membership requirements and attach a schedule of membership fees and dues.

(b) Describe your present and proposed efforts to attract members, and attach a copy of any descriptive literature or promotional material used for this purpose.

(c) Are benefits, services, or products limited to members? Yes No
If "No," explain.

11 Does or will the organization engage in activities tending to influence legislation or intervene in any way in political campaigns? Yes No

If "Yes," explain. (Note: You may wish to file Form 5768, Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation.)

12 Does the organization have a pension plan for employees? Yes No

13 (a) Are you filing Form 1023 within 15 months from the end of the month in which you were created or formed as required by section 508(a) and the related regulations? (See general instructions.) . . . Yes No

(b) If you answer "No," to 13(a) and you claim that you fit an exception to the notice requirements under section 508(a), attach an explanation of your basis for the claimed exception.

(c) If you answer "No," to 13(a) and section 508(a) does apply to you, you may be eligible for relief under regulations section 1.9100 from the application of section 508(a). Do you wish to request relief? . . . Yes No

(d) If you answer "Yes," to 13(c) attach a detailed statement that satisfies the requirements of Rev. Proc. 79-63.

(e) If you answer "No," to both 13(a) and 13(c) and section 508(a) does apply to you, your qualification as a section 501(c)(3) organization can be recognized only from the date this application is filed with your key District Director. Therefore, do you want us to consider your application as a request for recognition of exemption as a section 501(c)(3) organization from the date the application is received and not retroactively to the date you were formed (see instructions)? Yes No

Part IV.—Statement as to Private Foundation Status (see instructions)

1 Is the organization a private foundation? Yes No

2 If you answer "Yes," to question 1 and the organization claims to be a private operating foundation, check here and complete Part VII.

3 If you answer "No," to question 1 indicate the type of ruling you are requesting regarding the organization's status under section 509 by checking the box(es) below that apply:

(a) Definitive ruling under section 509(a)(1), (2), (3), or (4) . Complete Part VI.

(b) Advance ruling under sections 509(a)(1) and 170(b)(1)(A)(vi) or section 509(a)(2)—see instructions.

(c) Extended advance ruling under sections 509(a)(1) and 170(b)(1)(A)(vi) or section 509(a)(2)—see instructions.

(Note: If you want an extended advance ruling you must check the appropriate boxes for both 3(b) and 3(c). You must also complete and attach two Forms 872-C to the application.)

Statement of Support, Revenue, and Expenses for the period beginning 19....., and ending 19.....

Note: Complete the financial statements for the current year and for each of the three years immediately before it. If in existence less than four years, complete the statements for each year in existence. If in existence less than one year, also provide proposed budgets for the two years following the current year. [See Attachment C]

Support and Revenue	1	Gross contributions, gifts, grants, and similar amounts received	1	
	2	Gross dues and assessments of members	2	
	3	(a) Gross amounts derived from activities related to organization's exempt purpose (attach schedule)	3c	
		(b) Minus cost of sales		
	4	(a) Gross amounts from unrelated business activities (attach schedule)	4c	
		(b) Minus cost of sales		
	5	(a) Gross amount received from sale of assets, excluding inventory items (attach schedule)	5c	
		(b) Minus cost or other basis and sales expenses of assets sold		
	6	Investment income (see instructions)	6	
	7	Other revenue (attach schedule)	7	
	8	Total support and revenue	8	
Expenses	9	Fund raising expenses	9	
	10	Contributions, gifts, grants, and similar amounts paid (attach schedule)	10	
	11	Disbursements to or for benefit of members (attach schedule)	11	
	12	Compensation of officers, directors, and trustees (attach schedule)	12	
	13	Other salaries and wages	13	
	14	Interest	14	
	15	Rent	15	
	16	Depreciation and depletion	16	
	17	Other (attach schedule)	17	
	18	Total expenses	18	
		19	Excess of support and revenue over expenses (line 8 minus line 18)	19

Balance Sheet (at the end of the period shown above)		Enter date ►	Ending date
Assets			
20	Cash (a) Interest bearing accounts	20a	
	(b) Other	20b	
21	Accounts receivable, net	21	
22	Inventories	22	
23	Bonds and notes (attach schedule)	23	
24	Corporate stocks (attach schedule)	24	
25	Mortgage loans (attach schedule)	25	
26	Other investments (attach schedule)	26	
27	Depreciable and depletable assets (attach schedule)	27	
28	Land	28	
29	Other assets (attach schedule)	29	
30	Total assets	30	
Liabilities			
31	Accounts payable	31	
32	Contributions, gifts, grants, etc., payable	32	
33	Mortgages and notes payable (attach schedule)	33	
34	Other liabilities (attach schedules)	34	
35	Total liabilities	35	
Fund Balances or Net Worth			
36	Total fund balances or net worth	36	
37	Total liabilities and fund balances or net worth (line 35 plus line 36)	37	

If there has been any substantial change in any aspect of your financial activities since the period shown above ended, check the box and attach a detailed explanation

Part VI.—Non-Private Foundation Status (Definitive ruling only) Not applicable

A.—Basis for Non-Private Foundation Status (Check one of the boxes below.)

The organization is not a private foundation because it qualifies as:

✓	Kind of organization	Within the meaning of	Complete
1	a church or a convention or association of churches	Sections 509(a)(1) and 170(b)(1)(A)(i)	
2	a school	Sections 509(a)(1) and 170(b)(1)(A)(ii)	
3	a hospital or a medical research organization operated in conjunction with a hospital	Sections 509(a)(1) and 170(b)(1)(A)(iii)	
4	a governmental unit described in section 170(c)(1)	Sections 509(a)(1) and 170(b)(1)(A)(v)	
5	being organized and operated exclusively for testing for public safety	Section 509(a)(4)	
6	being operated for the benefit of a college or university which is owned or operated by a governmental unit	Sections 509(a)(1) and 170(b)(1)(A)(iv)	Part VI.-B
7	normally receiving a substantial part of its support from a governmental unit or from the general public	Sections 509(a)(1) and 170(b)(1)(A)(vi)	Part VI.-B
8	normally receiving not more than one-third of its support from gross investment income and more than one-third of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions)	Section 509(a)(2)	Part VI.-B
9	being operated solely for the benefit of or in connection with one or more of the organizations described in 1 through 4, or 6, 7, and 8 above	Section 509(a)(3)	Part VI.-C

B.—Analysis of Financial Support

	(a) Most recent tax year	(Years next preceding most recent tax year)			(a) Total
	19.....	(b) 19.....	(c) 19.....	(d) 19.....	
1 Gifts, grants, and contributions received					
2 Membership fees received					
3 Gross receipts from admissions, sales of merchandise or services, or furnishing of facilities in any activity which is not an unrelated business within the meaning of section 513					
4 Gross investment income (see instructions for definition)					
5 Net income from organization's unrelated business activities not included on line 4					
6 Tax revenues levied for and either paid to or spent on behalf of the organization					
7 Value of services or facilities furnished by a governmental unit to the organization without charge (not including the value of services or facilities generally furnished the public without charge)					
8 Other income (not including gain or loss from sale of capital assets)—attach schedule					
9 Total of lines 1 through 8					
10 Line 9 minus line 3					
11 Enter 2% of line 10, column (e) only					

12 If the organization has received any unusual grants during any of the above tax years, attach a list for each year showing the name of the contributor, the date and amount of grant, and a brief description of the nature of such grant. Do not include such grants on line 1 above—(See instructions).

Part VI.—Non-Private Foundation Status (Definitive ruling only) (Continued) Not applicable

B.—Analysis of Financial Support (Continued)

13 If the organization's non-private foundation status is based on:

(a) Sections 509(a)(1) and 170(b)(1)(A)(iv) or (vi).—Attach a list showing the name and amount contributed by each person (other than a governmental unit or "publicly supported" organization) whose total gifts for the entire period were more than the amount shown on line 11.

(b) Section 509(a)(2).—For each of the years included on lines 1, 2, and 3, attach a list showing the name of and amount received from each person who is a "disqualified person."

For each of the years on line 3, attach a list showing the name of and amount received from each payor (other than a "disqualified person") whose payments to the organization were more than \$5,000. For this purpose, "payor" includes but is not limited to, any organization described in sections 170(b)(1)(A)(i) through (vi) and any government agency or bureau.

C.—Supplemental Information Concerning Organizations Claiming Non-Private Foundation Status Under Section 509(a)(3)

1 Organizations supported by applicant organization:

Name and address of supported organization	Has the supported organization received a ruling or determination letter that it is not a private foundation by reason of section 509(a)(1) or (2)?
-----	<input type="checkbox"/> Yes <input type="checkbox"/> No
-----	<input type="checkbox"/> Yes <input type="checkbox"/> No
-----	<input type="checkbox"/> Yes <input type="checkbox"/> No
-----	<input type="checkbox"/> Yes <input type="checkbox"/> No
-----	<input type="checkbox"/> Yes <input type="checkbox"/> No

2 To what extent are the members of your governing board elected or appointed by the supported organization(s)?

3 What is the extent of common supervision or control that you and the supported organization(s) share?

4 To what extent do(es) the supported organization(s) have a significant voice in your investment policies, the making and timing of grants, and in otherwise directing the use of your income or assets?

5 Does the mentioning of the supported organization(s) in your governing instrument make you a trust that the supported organization(s) can enforce under State law and compel to make an accounting? Yes No If "Yes," explain.

6 What portion of your income do you pay to each supported organization and how significant is the support to each?

7 To what extent do you conduct activities which would otherwise be carried out by the supported organization(s)? Explain why these activities would otherwise be carried on by the supported organization(s).

8 Is the applicant organization controlled directly or indirectly by one or more "disqualified persons" (other than one who is a disqualified person solely because he or she is a manager) or by an organization which is not described in section 509(a)(1) or (2)? Yes No If "Yes," explain.

Part VII.—Basis for Status as a Private Operating Foundation

Not applicable

If the organization—

(a) bases its claim to private operating foundation status on normal and regular operations over a period of years; or (b) is newly created, set up as a private operating foundation, and has at least one year's experience; provide the information under the income test and under one of the three supplemental tests (assets, endowment, or support). If the organization does not have at least one year's experience, complete line 21. If the organization's private operating foundation status depends on its normal and regular operations as described in (a) above, attach a schedule similar to the one below showing the data in tabular form for the three years next preceding the most recent tax year. (See regulations section 53.4942(b)-1 for additional information before completing the "Income Test" section of Part VII.)

Income Test		Most recent tax year
1 (a)	Adjusted net income, as defined in regulations section 53.4942(a)-2(d). (Complete this line for each tax year covered by the application.)	
(b)	Minimum investment return, as defined in regulations section 53.4942(a)-2(c). (Complete this line only for tax years beginning after December 31, 1981.)	
2	Qualifying distributions:	
(a)	Amounts (including administrative expenses) paid directly for the active conduct of the activities for which organized and operated under section 501(c)(3) (attach schedule)	
(b)	Amounts paid to acquire assets to be used (or held for use) directly in carrying out purposes described in sections 170(c)(1) or 170(c)(2)(B) (attach schedule)	
(c)	Amounts set aside for specific projects which are for purposes described in section 170(c)(1) or 170(c)(2)(B) (attach schedule)	
(d)	Total qualifying distributions (add lines 2(a), (b), and (c))	
3	For tax years beginning before January 1, 1982, enter an amount on 3(a) only. For tax years beginning after December 31, 1981, enter an amount on 3(a) or 3(b) whichever is smaller.	
(a)	Percentage of qualifying distributions to adjusted net income (divide line 2(d) by line 1(a))	%
(b)	Percentage of qualifying distributions to minimum investment return (divide line 2(d) by line 1(b))	%
	(Percentage must be at least 85% for 3(a) or 3(b))	
Assets Test		
4	Value of organization's assets used in activities that directly carry out the exempt purposes. Do not include assets held merely for investment or production of income (attach schedule)	
5	Value of any stock of a corporation that is controlled by applicant organization and carries out its exempt purposes (attach statement describing corporation)	
6	Value of all qualifying assets (add lines 4 and 5)	
7	Value of applicant organization's total assets	
8	Percentage of qualifying assets to total assets (divide line 6 by line 7—percentage must exceed 65%)	%
Endowment Test		
9	Value of assets not used (or held for use) directly in carrying out exempt purposes:	
(a)	Monthly average of investment securities at fair market value	
(b)	Monthly average of cash balances	
(c)	Fair market value of all other investment property (attach schedule)	
(d)	Total (add lines 9(a), (b), and (c))	
10	Subtract acquisition indebtedness related to line 9 items (attach schedule)	
11	Balance (subtract line 10 from line 9(d))	
12	Multiply line 11 by 3 1/3% (3 1/3 of the percentage for the minimum investment return computation under section 4942(e)). Line 2(d) above must equal or exceed the result of this computation	
Support Test		
13	Applicant organization's support as defined in section 509(d)	
14	Subtract amount of gross investment income as defined in section 509(e)	
15	Support for purposes of section 4942(j)(3)(B)(iii) (subtract line 14 from line 13)	
16	Support received from the general public, five or more exempt organizations, or a combination of these sources (attach schedule)	
17	For persons (other than exempt organizations) contributing more than 1% of line 15, enter the total amounts that are more than 1% of line 15	
18	Subtract line 17 from line 16	
19	Percentage of total support (divide line 18 by line 15—must be at least 85%)	%
20	Does line 16 include support from an exempt organization that is more than 25% of the amount on line 15?	<input type="checkbox"/> Yes <input type="checkbox"/> No
21	Newly created organizations with less than one year's experience: Attach a statement explaining how the organization is planning to satisfy the requirements of section 4942(j)(3) for the income test and one of the supplemental tests during its first year's operation. Include a description of plans and arrangements, press clippings, public announcements, solicitations for funds, etc.	

Part VIII.—Required Schedules for Special Activities

	If "Yes," check here:	And, complete schedule—
1 Is the organization, or any part of it, a school?		A
2 Does the organization provide or administer any scholarship benefits, student aid, etc.?		B
3 Has the organization taken over, or will it take over, the facilities of a "for profit" institution?		C
4 Is the organization, or any part of it, a hospital or a medical research organization?		D
5 Is the organization, or any part of it, a home for the aged?		E
6 Is the organization, or any part of it, a litigating organization (public interest law firm or similar organization)?		F
7 Is the organization, or any part of it, formed to promote amateur sports competition?		G

SCHEDULE A.—Schools, Colleges, and Universities

1 Is the organization an instrumentality of a State or political subdivision of a State? Yes No
 If "Yes," document this in Part III and do not complete items 2 through 8 of this schedule. (See instructions for Schedule A.)

2 Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to:

(a) Admissions? Yes No

(b) Use of facilities or exercise of student privileges? Yes No

(c) Faculty or administrative staff? Yes No

(d) Scholarship or loan program? Yes No

If "Yes," for any of the above, explain.

3 Does the organization include a statement in its charter, bylaws, or other governing instrument, or in a resolution of its governing body, that it has a racially nondiscriminatory policy as to students? Yes No
 Attach whatever corporate resolutions or other official statements the organization has made on this subject.

4 (a) Has the organization made its racially nondiscriminatory policies known in a manner that brings the policies to the attention of all segments of the general community which it serves? Yes No
 If "Yes," describe how these policies have been publicized and state the frequency with which relevant notices or announcements have been made. If no newspaper or broadcast media notices have been used, explain.

(b) If applicable, attach clippings of any relevant newspaper notices or advertising, or copies of tapes or scripts used for media broadcasts. Also attach copies of brochures and catalogues dealing with student admissions, programs, and scholarships, as well as representative copies of all written advertising used as a means of informing prospective students of your programs.

5 Attach a numerical schedule showing the racial composition, as of the current academic year, and projected as far as may be feasible for the next academic year, of: (a) the student body, (b) the faculty and administrative staff.

6 Attach a list showing the amount of any scholarship and loan funds awarded to students enrolled and the racial composition of the students who have received the awards.

7 (a) Attach a list of the organization's incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.
 (b) State whether any of the organizations listed in (a) have as an objective the maintenance of segregated public or private school education, and, if so, whether any of the individuals listed in (a) are officers or active members of such organizations.

8 Indicate the public school district and county in which the organization is located.

SCHEDULE B.—Organizations Providing Scholarship Benefits, Student Aid, etc. to Individuals

1 (a) Describe the nature of the scholarship benefit, student aid, etc., including the terms and conditions governing its use, whether a gift or a loan, and the amount. If the organization has established or will establish several categories of scholarship benefits, identify each kind of benefit and explain how the organization determines the recipients for each category. Attach a sample copy of any application the organization requires or will require of individuals to be considered for scholarship grants, loans, or similar benefits. (Private foundations that make grants for travel, study or other similar purposes are required to obtain advance approval of scholarship procedures. See regulations sections 53.4945-4(c) and (d).)

(b) If you want this application considered as a request for approval of grant procedures in the event we determine that you are a private foundation, check here

2 What limitations or restrictions are there on the class of individuals who are eligible recipients? Specifically explain whether there are, or will be, any restrictions or limitations in the selection procedures based upon race and whether there are, or will be, restrictions or limitations in selection procedures based on the employment status of the prospective recipient or any relative of the prospective recipient. Also indicate the approximate number of eligible individuals.

3 Indicate the number of grants you anticipate making annually _____

4 List the names, addresses, duties, and relevant background of the members of your selection committee. If you base your selections in any way on the employment status of the applicant or any relative of the applicant, indicate whether there is or has been any direct or indirect relationship between the members of the selection committee and the employer. Also indicate whether relatives of the members of the selection committee are possible recipients or have been recipients.

5 Describe any procedures you have for supervising grants, such as obtaining reports or transcripts, which you award and any procedures you have for taking action if the terms of the grant are violated.

SCHEDULE C.—Successors to "For Profit" Institutions

1 What was the name of the predecessor organization and the nature of its activities?

2 Who were the owners or principal stockholders of the predecessor organization? (If more space is needed, attach schedule.)

Name and address	Share or interest

SCHEDULE C.—Successors to "For Profit" Institutions (Continued)

3 Describe the business or family relationship between the owners or principal stockholders and principal employees of the predecessor organization and the officers, directors, and principal employees of the applicant organization.

4 (a) Attach a copy of the agreement of sale or other contract that sets forth the terms and conditions of sale of the predecessor organization or of its assets to the applicant organization.

(b) Attach an appraisal by an independent qualified expert showing the fair market value of the facilities or property interest sold at the time of sale.

5 Has any property or equipment formerly used by the predecessor organization been rented to the applicant organization or will any such property be rented? Yes No

If "Yes," explain and attach copies of all leases and contracts.

6 Is the organization leasing or will it lease or otherwise make available any space or equipment to the owners, principal stockholders, or principal employees of the predecessor organization? Yes No

If "Yes," explain and attach a list of these tenants and a copy of the lease for each such tenant.

7 Were any new operating policies initiated as a result of the transfer of assets from a profit-making organization to a nonprofit organization? Yes No

If "Yes," explain.

SCHEDULE D.—Hospitals and Medical Research Organizations

Check here if you are claiming to be a hospital and complete the questions in Part I of this Schedule and write "N/A" in Part II.

Check here if you are claiming to be a medical research organization operated in conjunction with a hospital and complete the questions in Part II of this Schedule and write "N/A" in Part I.

Part I.—Hospitals

1 (a) How many doctors are on the hospital's courtesy staff? _____
(b) Do these doctors include all the doctors in the community? Yes No

If "No," give the reasons why and explain how the courtesy staff is selected.

2 Composition of board of directors or trustees. (If more space is needed, attach schedule.)

Name and address	Occupation

SCHEDULE D.—Hospitals and Medical Research Organizations (Continued)

Part I.—Hospitals (Continued)

3 (a) Does the hospital maintain a full-time emergency room? Yes No
(b) What is the hospital's policy on administering emergency services to persons without apparent means to pay?

(c) Does the hospital have any arrangements with police, fire, and voluntary ambulance services for the delivery or admission of emergency cases? Yes No
Explain.

4 (a) Does or will the hospital require a deposit from persons covered by Medicare or Medicaid in its admission practices? Yes No
If "Yes," explain.

(b) Does the same deposit requirement apply to all other patients? Yes No
If "No," explain.

5 Does or will the hospital provide for a portion of its services and facilities to be used for charity patients? . Yes No
Explain (include data on the hospital's past experience in admitting charity patients and arrangements it may have with municipal or governmental agencies for absorbing the cost of such care).

6 Does or will the hospital carry on a formal program of medical training and research? Yes No
If "Yes," describe.

7 Does the hospital provide office space to physicians carrying on a medical practice? Yes No
If "Yes," attach a list setting forth the name of each physician, the amount of space provided, the annual rent (if any), and the expiration date of the current lease.

Part II.—Medical Research Organizations

1 Name the hospital(s) with which you have a relationship and describe the relationship(s).

2 Describe your present and proposed (indicate which) medical research activities, show the nature of the activities, and the amount of money which has been or will be spent in carrying them out. (Making grants to other organizations is not direct conduct of medical research.)

3 Attach a statement of assets showing the fair market value of your assets and the portion of the assets directly devoted to medical research.

SCHEDULE E.—Homes for Aged

1 What are the requirements for admission to residency? Explain fully and attach promotional literature and application forms.

2 Does or will the home charge an entrance or founder's fee? Yes No
If "Yes," explain.

3 What periodic fees or maintenance charges are or will be required of its residents?

4 (a) What established policy does the home have concerning residents who become unable to pay their regular charges?

(b) What arrangements does the home have or will it make with local and Federal welfare units, sponsoring organizations, or others to absorb all or part of the cost of maintaining those residents?

5 What arrangements does or will the home have to provide for the health needs of its residents?

6 In what way are the home's residential facilities designed to meet some combination of the physical, emotional, recreational, social, religious, and similar needs of the aged?

7 Has the home established or will it establish any reserves for future expenditures? Yes No
If "Yes," state the source of such reserves and explain how they will be used.

8 Attach a sample copy of the contract or agreement the organization makes with or requires of its residents.

SCHEDULE F.—Litigating Organizations (Public Interest Law Firms and Similar Organizations)

1 Will the organization conform to the guidelines for organizations engaged in litigation activities issued by the Internal Revenue Service in Rev. Proc. 71-39, 1971-2 C.B. 575, and Rev. Proc. 75-13, 1975-1 C.B. 662? Yes No
If "No," explain.

2 What is the organization's area of public interest or concern?

3 Is the organization set up primarily to try the case of a particular person or prosecute a particular cause of action? Yes No
If "Yes," explain.

4 What are the organization's criteria for selection of cases?

5 In what cases has the organization started legal proceedings and in what other cases is it preparing to start proceedings? Describe the legal issues involved in each case and explain how they relate to the organization's area of concern.

6 (a) Composition of the organization's board of directors or trustees:

Name and address	Business or Occupation

(b) Will any of the attorneys hired by the organization be a trustee or member of the board of directors of the organization or be associated in the practice of law with any such trustee or member? Yes No
If "Yes," explain.

7 Does or will the organization share office space with a private law firm? Yes No
If "Yes," explain.

8 Does or will the organization receive fees for its professional services? Yes No
If "Yes," explain.

SCHEDULE G.—National or International Amateur Sports Competition

1 Does your organization directly or indirectly provide any facilities or equipment for the use of amateur athletes engaged in national or international sports competition? Yes No

2 How do you foster national or international sports competition?

3 Do you provide financial assistance to amateur athletes? Yes No

Attachment A

The Foundations Fund Raising Program

The Ronald Reagan Presidential Foundation, a California non-profit public benefit corporation, will be financed with the broadest possible base of support, with thousands of individual contributors. Special fund drives will be held for the public at large as well as select groups who have evidenced an interest in supporting the construction of the Presidential Library and Center for Public Affairs. Individual donors who furnish substantial gifts will be afforded an opportunity to have a room or portion of the building named in their honor. Business groups and organizations interested in supporting the construction and programs of the Presidential Library and Center will be given an opportunity to contribute. In addition, once the Library and Center are operational, fees will be collected for conferences and lectures and money realized from the sale of books and publications. Grants from private foundations and governmental departments and agencies, as well as contributions from individuals, will also be used to support the on-going programs of the Library and Center.

It is anticipated that total contributions during 1985 will range from 1 to 10 million dollars. Much will depend upon how quickly the foundation becomes organized and operational and how soon, thereafter, it is able to undertake the projected broad base fund raising activity. In 1986, contributions should total from 10 to 20 million dollars.

Attachment B

Activities and Operational Information of the Foundation

The Ronald Reagan Presidential Library

When President Ronald Reagan concludes his second term, his presidential papers will be shipped to Stanford University where university officials together with President Reagan's representatives have begun plans for a presidential library. President Reagan's association with Stanford University dates from 1975, when he placed his gubernatorial papers at the Hoover Institution, an independent center for advanced research within the frame of Stanford University. He has continued to deposit his papers there and is also an Honorary Fellow of the Institution. Together with the Hoover Institution's world-renowned library and archives, with which it will be affiliated, the Reagan Presidential Library will represent a preeminent resource for scholarly research.

At the current rate of accumulation, the Reagan White House will produce some 60 million documents. They include the President's own papers, the files of his advisers, speech writers, and cabinet members, as well as records of units of the Executive Office of the President. Future scholars will find documents on international affairs, national defense, disarmament negotiations, environmental protection, crime, education, welfare, health, and economic policy, among other topics.

The Library's exhibit program will complement the main functional uses of the archival material in the library. Original documents, working drafts, and photographs will show how government policy is formulated and provide a vivid educational experience for both students and the general public.

All presidential libraries have been built with private funds contributed by thousands of individuals and organizations from across the country and around the world. Once constructed, the buildings are turned over to the Federal Government, which assumes the continuing operating expenses. The U.S. National Archives and Records Administration, an agency of the Federal Government, will administer the Reagan Presidential Library, as it does other presidential libraries.

The Ronald Reagan Center for Public Affairs

The basic purpose of the Ronald Reagan Center for Public Affairs is to encourage and facilitate the advanced study of public affairs in the United States, focussing on the major national and international policy issues that this country will face in the years ahead.

A group of visiting Fellows, appointed for specific terms, will constitute the major portion of the research effort. The visiting Fellows, who are expected to come primarily from colleges and universities, other research institutions, the media, and government, will pursue independent inquiries on major public policy issues. Time spent at the Center should enable each Fellow to complete a major published work.

The Ronald Reagan Center for Public Affairs (Cont.)

To encourage the advanced study of public affairs, the Center will regularly sponsor conferences that will enable the world's leading experts to gather together in congenial surroundings to discuss and analyze the most important public affairs issues of the time. These conferences would include leading experts from the academic world, government, the media, business, and the professions. Residential study units will allow key conference participants to interact on an intensive basis.

The Center will be administered by the Ronald Reagan Presidential Foundation Trustees and its officers. A National Academic Advisory Board of distinguished scholars from across the country will assist in the selection of the Center's visiting Fellows, and give advice on conference programs. The Center's operating budget will be funded by a combination of endowment income, annual gifts and fees from conferences and lectures. The Foundation will seek financial support for both building costs and endowment and operating expenses.

Sites and Facilities

The Board of Trustees of Stanford University has given its approval for the use of 20 acres adjacent to the central campus as the site for the Reagan Presidential Library. The site is located on the south side of the Junipero Serra Boulevard just beyond the first foothill overlooking the campus and San Francisco Bay. Its close proximity to the central campus creates an ideal location for scholarly users. At the same time the natural surroundings and scenic views make it one of the most beautiful sites ever offered for a presidential library.

Consideration will be given to keeping the library modest enough in size to minimize maintenance costs for the government but flexible enough to allow space for a growing program. Space will be provided for research and reading rooms, exhibit area, conference and seminar rooms, archival processing and work areas, archival stacks, computer and other service areas, administrative offices, and a presidential office. Ground-breaking for the library is expected to occur in two years, and construction will be completed by the end of President Reagan's second term.

A specific site has not yet been selected for the Center for Public Affairs. The physical facilities of the Center will include conference and seminar rooms, offices for staff and visiting fellows, residential units, and banquet room. The Center will be equipped with state of the art audio-visual facilities, computers, simultaneous translation for international conferences, and television and audio recording capabilities.

The Reagan Presidential Foundation Fund

The Reagan Presidential Foundation Fund will finance the design, construction, and endowment for both the Reagan Center for Public Affairs and the Reagan Presidential Library. Estimated center and library building costs are \$53 million. The Fund will also create an endowment to support the Center's visiting fellows and conference programs and to fund special projects at the Library not covered by government appropriations (for example, oral history interviews, grants-in-aid, and publications).

Attachment to Form 1023

THE RONALD REAGAN PRESIDENTIAL FOUNDATION

Estimated Capital Expenditures, Endowment Fund and Annual Operating Budget

I. <u>Capital Expenditures 1985 - 1989</u>		
A. <u>Library/Museum</u>		
Building	\$18,560,000	
Furnishings	1,500,000	
Utilities	200,000	
Roadway	600,000	
Parking	140,000	
		\$21,000,000
B. <u>Center for Public Affairs</u>		
Land and Building	\$27,000,000	
Furnishings	4,000,000	
Landscaping	500,000	
Utilities	300,000	
Roadway	150,000	
Parking	150,000	
		\$32,100,000
II. <u>Endowment Fund</u>		\$40,000,000
III. <u>Annual Operating Budget</u>		
A. <u>Presidential Foundation 1985 - 1986</u>		
Office, administration and fund raising activities		\$750,000
B. <u>Library/Museum 1988 - 1989</u>		
Special Programs, such as oral history project, conferences, publications, grants-in-aid, (all operational expenses are paid by the U.S. Government.)		\$500,000
C. <u>Center for Public Affairs 1988 - 1989</u>		
Administration	\$500,000	
Overhead (building maintenance, security, utilities, etc.)	800,000	
Research (fellows and support staff)	2,500,000	
Conferences	1,500,000	
		\$5,300,000

EXEMPTION APPLICATION

DO NOT USE THESE SPACES
SERIAL NO.
AMOUNT REMITTED

Every organization that claims to be exempt must furnish the information and data specified and pay the **REQUIRED \$25.00 APPLICATION FEE**. If any organization fails to send the information and data required or to pay the required fee, this application will not be considered on its merits and the organization will be notified accordingly. This application shall be open to public inspection in accordance with Section 26451.3 of the Revenue and Taxation Code if exemption is granted.

See instructions for FTB 3500 for guidance on completion and submission.

1a. Full name of organization **The Ronald Reagan Presidential Foundation** b. Federal Employer Identification Number (see Specific Instruction 3, Item 1b) **Is now being applied for**

c. Mailing address of organization (number, street, city, state, and ZIP code) **801 Welch Road, Suite 101; Stanford Professional Center; Palo Alto, CA 94304** b. Telephone number **(415) 497-2063 (415) 326-4262**

2a. Name of representative to be contacted regarding additional requirements or information **Richard T. Burress and/or John M. Donegan** b. Telephone number **(415) 497-2063 (415) 326-4262**
c. Representative's address (number, street, city, state, and ZIP code) **801 Welch Rd., Suite 101, Palo Alto, CA 94304**

3a. Is the organization incorporated? Yes No b. If "Yes," in which state? **California** c. California Corporate Number **1269144**

4a. If not incorporated, what is form of organization? Now being incorporated Unincorporated association Trust

b. Date organized c. Month in which the annual accounting period ends

5a. Has this organization or its predecessor previously applied for exemption? Yes No

b. If "Yes," check appropriate box(es) and enter "Granted" or "Denied" and date of determination for each box checked.

California _____ Date _____ Federal _____ Date _____ Other state _____ Date _____

Furnish copies of any determination letters received.

6a. Has organization filed Federal Income tax returns? Yes No

b. If "Yes," state type of returns and years filed.

7a. Enter California Revenue and Taxation Code section under which exemption claimed (see instructions) **Section 23701**

b. Primary activity of organization: **Establishing and maintaining Presidential library, museum and Public Affairs Center.**

	Yes	No
8a. Are you a new organization? If "No," attach a statement indicating the name of your predecessor(s), the period during which it was in existence, and the reasons for its termination.	X	
b. Are you a membership organization? If "Yes," attach a statement which explains fully the qualifications for members, the different classes of membership, the number of members in each class, and the voting rights and privileges accorded each class.		X
c. Have you made or do you plan to make any distribution of your property or surplus to officers or members? If "Yes," attach a statement containing full details.		X
d. Will any of the incorporators share any facilities with the organization? If "Yes," attach a statement explaining in detail.		X
e. Will any property be rented, purchased, or transferred in any way from any of the incorporators? If "Yes," attach a statement explaining in detail.		X
f. Will any promoter, incorporator, founder, or member be employed by the organization? If "Yes," furnish complete details, including duties, responsibilities, qualifications, and compensation.		X
g. Will any director be compensated for services other than as a director, e.g. officer, employer? If "Yes," furnish the name(s) of the director(s), and the amount(s) of compensation for each. Also list the names of the other directors, indicating their blood or marriage relationship, if any, to the compensated director(s).		X

YOU MUST SUBMIT THE INFORMATION REQUESTED IN QUESTION 9, PAGE 2, OF THIS APPLICATION

NOTE: FOREIGN CORPORATIONS OR TRUSTS MUST SECURE A FEDERAL EXEMPTION AND FURNISH A COPY OF THE FEDERAL EXEMPT DETERMINATION LETTER.

Under penalties of perjury, I declare that I have examined this application, including accompanying schedules and statements and to the best of my knowledge and belief, it is true, correct and complete.

February 27, 1985 DATE
Sacramento, CA PLACE SIGNED

SIGNATURE OF OFFICER OR REPRESENTATIVE

INCORPORATOR

INCORPORATOR
TITLE

[Versions of this form prior to (10-83) are obsolete and should be destroyed.]

Section 23701 requires that each organization **MUST PAY A \$25.00 APPLICATION FEE**. Processing of the application cannot be completed until the application fee is received. **DO NOT SEND CASH. ALLOW 45 DAYS FOR PROCESSING.**

9. YOU MUST ATTACH THE APPLICABLE INFORMATION REQUESTED:

- a. If incorporated, a copy of your endorsed articles of incorporation and all subsequent amendments; if now being incorporated, proposed articles must be submitted to the Secretary of State with application; if not incorporated, a copy of your constitution, articles of association, declaration of trust, or other document setting forth your aims and purposes which is signed by the principal officers or trustees.
- b. A copy of your bylaws, proposed bylaws, or other similar code of regulations.
- c. For each accounting period that you were in existence and for which exemption is desired, furnish complete statements of receipts and expenditures, and assets and liabilities. Organizations that have not commenced operations or have been operating less than one year, see item "d" below.
- d. A proposed budget showing expected income by source and areas of expenditures for the first year of operation if a newly formed organization or just commencing operations. **THE BUDGET IS REQUIRED BEFORE THE APPLICATION WILL BE PROCESSED** and should be based upon your most reasonable expectations.
- e. A statement (in your own words) that states the specific purposes for which the organization was formed. (Do not quote the Articles of Incorporation or bylaws for this purpose.)
- f. A statement which describes in detail the programs and activities which are presently carried on or will be carried on by the organization and how they will accomplish the specific purposes of the organization.
- g. A statement explaining in detail each fund-raising activity and each business enterprise you have engaged in or plan to engage in (accompanied by copies of all agreements, if any) with other parties for the conduct of each fund-raising activity or business enterprise.
- h. A statement which explains fully any specific activities that the organization has engaged in or sponsored and which have been discontinued. Give dates of commencement and termination and the reasons for discontinuance.
- i. A copy of each lease, if any, in which you are the lessee or lessor of property (real, personal, gas, oil, or mineral) or in which you own an interest under such lease, together with copies of all agreements with other parties for development of the property.
- j. Samples of any literature which the organization sells or distributes and samples of any organizational advertising.
- k. In addition to the above, one item (of 10 through 21) must be completed by most organizations according to the section under which exemption is being claimed. If you are claiming an exemption under a section indicated below, check item and furnish information or answer questions for that type of organization.

Labor, Agricultural or Horticultural organization under Section 23701a	(Answer Question 10)	<input type="checkbox"/>
Fraternal Beneficiary Society, etc., as described in Section 23701b, or Fraternal Society described in Section 23701i	(Answer Question 11)	<input type="checkbox"/>
Cemetery company or corporation chartered solely for burial purposes, as described in Section 23701c	(Answer Question 12)	<input type="checkbox"/>
Religious, Charitable, Scientific, Literary, or Educational organization under Section 23701d	(Answer Question 13)	<input checked="" type="checkbox"/>
Business League, Chamber of Commerce, etc., under Section 23701e	(Answer Question 14)	<input type="checkbox"/>
Civic League, Social Welfare (Including a veteran post or council), or Local Employee organization under Section 23701f	(Answer Question 15)	<input type="checkbox"/>
Social and Recreational organization under Section 23701g	(Answer Question 16)	<input type="checkbox"/>
Title Holding Corporation under Section 23701h	(Answer Question 17)	<input type="checkbox"/>
Voluntary Employees' Beneficiary organization under Section 23701i	(Answer Question 18)	<input type="checkbox"/>
Diversified Management Company under Section 23701m	(Answer Question 19)	<input type="checkbox"/>
Supplemental Unemployment Compensation Trust under Section 23701n	(Answer Question 20)	<input type="checkbox"/>
Group Legal Services Plan under Section 23701q	(Answer Question 21)	<input type="checkbox"/>
Homeowners Association under Section 23701t	(Answer Question 22)	<input type="checkbox"/>

- 10. If you are claiming exemption as a **Labor, Agricultural, or Horticultural organization under Section 23701a**, submit an explanation of any services to be performed for your members. Cooperative organizations applying for exemption under Section 23701a must submit a copy of the Federal exemption letter showing exemption under IRC 501(c)(5).
- 11a. If you are claiming exemption as a **Fraternal Beneficiary Society, etc., as described in Section 23701b**, or a **Fraternal Society described in Section 23701i**, state whether the organization operates or plans to operate under the lodge system or for the exclusive benefit of the members of an organization so operating. Operating under the lodge system means carrying on activities under a form of organization that comprises local branches, chartered by a parent organization, largely self-governing, and called lodges, chapters, or the like.
 - b. In the case of a **Subordinate or Local Lodge, etc.**, attach a certificate signed by the secretary of the parent organization, under the seal of that organization, certifying that the Subordinate Lodge is a duly constituted body operating under the jurisdiction of the parent body.
 - c. In the case of a **Parent or Grand Lodge**, attach a statement showing (1) the number of subordinate lodges in active operations, and (2) whether periodic meetings are actually held.
 - d. For **23701b organizations only**, attach a statement describing the types of benefits (life, sick, accident, or other benefits) paid or to be paid to members.
- 12. If you are claiming exemption as a **cemetery company or corporation chartered solely for burial purposes, as described in Section 23701c**:
 - a. Attach the following statements and/or documents:
 - (1) Complete copy of sales contract or other document involved in acquisition of cemetery property by the organization.
 - (2) Complete copy of any contract you may have which designates an agent to sell your cemetery lots.
 - (3) Names of officers and directors of your organization from the date of incorporation to the present date and show the period for which each held office.
 - (4) Appraised value of cemetery property as of the date acquired. The appraisal should be obtained from sources other than the parties in interest.

12 b. Do you have or do you plan to have a perpetual care fund? Yes No

If "Yes," furnish copy of Federal exemption letter, copy of the fund agreement, and a statement giving nature of such fund (cash, securities, unsold land, etc.), manner in which and by whom the fund is or will be administered, and specific purposes for which it is used.

c. Do you operate a crematorium? Yes No

13. If you are claiming exemption as a Religious, Charitable, Scientific, Literary, or Educational organization under Section 23701d, answer questions "a" through "d". Attach statement explaining all "Yes" answers in "a" through "d".

- a. Did you receive or do you expect to receive 10 percent or more of your assets from any organization group of affiliated organizations (affiliated through stockholding, common ownership, or otherwise), any individual, or members of a family group (brother or sister whether whole or half blood, spouse, ancestor, or lineal descendant)?
- b. Are you now, have you ever been, or do you plan to be engaged in carrying on propaganda, or otherwise advocating or opposing pending or proposed legislation?
- c. Do you participate or plan to participate in or intervene in (including the publishing or distributing of statements) any political campaign on behalf or in opposition to any candidate for public office?
- d. Do you hold or plan to hold 10 percent or more of any class of stock or 10 percent or more of the total combined voting power of stock in any corporation?

Yes	No
	X
	X
	X
	X

- e. If claiming exemption as a CHURCH, attach statement including the following:
 - (1) Has a permanent place of worship been established? At what address? Who is the legal owner of this property? Describe the physical characteristics of your church buildings. Explain to what extent these buildings are used for purposes other than religious worship.
 - (2) Furnish information regarding the religious background and formal religious training of the religious leaders. Furnish a transcript or similarly formatted information that shows the training received and in what time frame. Was this training received on-site or off-site as part of a self-study program? Please explain.
 - (3) Furnish a copy of the religious leader's certificate of ordination.
 - (4) What percentage of your annual gross income will be received from incorporators, officers, directors or their families?
 - (5) What percentage of the organization's proposed expenditures will be used for the personal living expenses of the individuals mentioned in item 4 above.
 - (6) Does your organization have a regular congregation or regular religious services? How many members do you have? Where and how often are religious services held?

14. If you are claiming exemption as a Business League, Chamber of Commerce, etc., under Section 23701e, state whether you perform, or plan to perform, particular services for members, shareholders, or others, such as furnishing credit reports, collecting accounts, inspecting products, conducting advertising, purchasing merchandise, or other similar undertakings. Yes No If "Yes," attach a detailed statement, including income realized and expenses incurred, regarding such activities. If engaged in advertising, attach specimen copies of material.

15. If a Local Association of Employees, attach a statement giving names and addresses of employers whose employees are eligible for membership in the association. If employees of more than one plant or office of the same employer are eligible for membership, give the address of each such plant or office.

16. If you are claiming exemption as a Social and Recreational organization under Section 23701g, answer the following questions and furnish the information requested.

- a. Do you solicit or do you plan to solicit public patronage of your facilities by advertisement or otherwise? If "Yes," attach sample copies of such advertisements or other solicitations.
- b. Are nonmembers other than bona fide guests of members permitted, or will they be permitted to use the club facilities or participate in or attend any functions or activities conducted by the organization? If "Yes," attach a statement describing the functions or activities in which such nonmembers have participated or will participate, or to which they have been admitted or will be admitted. If such nonmembers have participated in or have been admitted to any functions or activities, state the amount received from such nonmembers, the expenses attributable to such functions, and the disposition made of net profits, if any, derived therefrom.
- c. Do you rent or lease or do you plan to rent or lease any part of the club's property to others? If "Yes," attach a statement indicating the reason for such action or proposed action and the amount received or to be received. Also attach copies of the rental agreements or leases.
- d. Have you or will you derive any income from nonmembers not explained above? If "Yes," furnish a statement separating the member and nonmember income for the past three years and a proposed budget separating member and nonmember income for the next period of operation.
- e. State total number of club members. If you have different classes of membership, explain dues and privileges of each class.

Yes	No

- 17. If you are claiming exemption as a Title Holding Corporation under Section 23701h, answer the following questions and furnish the information requested.
 - a. Attach a statement giving the complete names and addresses of organizations for which title to property is held, the number of shares of capital stock held, and whether shares of stock have ever been held by persons other than such organizations. If stock was so held, include the years held and the total number of shares of each class of stock.
 - b. State whether the annual income (less expenses) is or will be turned over to the organization for which title to property is held. If "No," explain what disposition will be made of the income.
 - c. Enclose a copy of an exemption letter (Federal or California) for each organization for which property will be held. If property will be held for organization(s) located in California, a California exemption letter must be furnished.
- 18. If you are claiming exemption as a Voluntary Employees' Beneficiary organization under Section 23701i, furnish a copy of the Federal determination letter showing exemption under IRC 501(c)(9).

19. If exemption is claimed as a Diversified Management Company under Section 23701m, state the date that the corporation was registered as a Diversified Management Company under Section 5 of the Federal Investment Act of 1940 (15 U.S.C.A.—§80a-8). Date _____

20. If you are claiming exemption as a Supplemental Unemployment Compensation Trust under Section 23701n, attach a copy of the supplemental unemployment benefit plan and appurtenant agreements.

- a. Are benefits provided for individual proprietors, partners, or self-employed persons under the plan? If "Yes," attach a statement explaining in detail
- b. Does the plan provide other benefits subordinate to the supplemental unemployment compensation benefits? If "Yes," attach a statement explaining in detail
- c. Do the benefits provided by the trust discriminate in favor of employees who are officers, shareholders, persons whose principal duties consist of supervising the work of other employees, or highly compensated employees? If "Yes," attach a statement explaining in detail
- d. Amount of income or receipts from members and employers of members for each year for which exemption is claimed.
- e. Amount of income or receipts from sources other than members and employers of members for each year for which exemption is claimed.
- f. Furnish a copy of the Federal determination letter.

Yes	No

21. If exemption is claimed as a group legal services plan, furnish a copy of the Federal determination letter showing exemption under IRC 501(c)(20).

22. If you are claiming exemption as a Homeowners Association under Section 23701l, answer the following questions and furnish the information requested. Attach a supplemental schedule if needed.

- a. Will any of the individual units/lots owned by the organization or its members be occupied for other than personal residential purposes? If "Yes," answer the following:
 - (1) What percentage of the units/lots will be used for nonresidential purposes?
 - (2) If the organization is claiming exemption as a condominium management association, indicate square footage of all units and square footage devoted to residential purposes.
 - (3) What percentage of the organization's total gross income will be derived from dues, fees, or assessments from nonresidential members?
- b. Will this organization own, maintain or operate a mutual water company, well, electrical generating facility or other utility? If "Yes," describe in detail and answer the following:
 - (1) Are your members/shareholders the actual users of the utility, or simply investors?
 - (2) Is this organization furnishing utilities to residential homes, commercial businesses or both? If both, indicate what percent of this organization's total income will be derived from sale of utilities for nonresidential usage.
 - (3) How are members/shareholders assessed for utilities usage? Are they assessed equally, according to square footage/acreage, metered, etc.?
- c. Furnish a copy of the Declaration of Covenants, Conditions and Restrictions, if applicable.

FOR FRANCHISE TAX BOARD OFFICES/TELEPHONE ASSISTANCE

Refer to your Telephone Directory



Attachment to Form FTB 3500

Exemption Application, re

The Ronald Reagan Presidential Foundation

FTB 3500

9: d. Proposed Budget for 1985

Expected Income:

It is expected that contributions will be received, from many citizens and from some foundations and business organizations, in varying amounts. It is expected that totals received will be approximately as follows during 1985: \$1,000,000.00 to \$10,000,000.00.

Expected Expenditures:

The primary expenditures expected to occur in 1985 are organizational and administrative expenses, and for preliminary planning for the construction and establishment of library facilities and of a center for public affairs; and possibly preparation of an invitation to make contributions. It is expected that expenditures will total approximately as follows in 1985:

Administrative, organizational, office and fund-raising activities,	\$1,000,000.00
Architectural and Engineering:	\$200,000.00

Please Note: Copy of a budgetary estimate covering the next several years is attached.

e. The Ronald Reagan Presidential Foundation has been formed to raise the money necessary to design and construct a Presidential library and museum that will house and maintain the papers, records and documents of the Reagan Presidency, and a Center for Public Affairs that will study the office of the Presidency and other public affairs. The Foundation will also establish, raise and administer an endowment fund that will be used to support certain activities of the Presidential library and the activities and scholarly work of the Center for Public Affairs.

f. No programs or activities are yet carried on, as the corporation has just now been formed. However, once it is fully operational, approximately April 1, 1985, it will engage in fund raising activities, supervise the design and construction of a Presidential library and museum and a Center for Public Affairs. Once the construction and fund raising have been completed, the Foundation will supervise and direct the operation and programs of the Center, and administer the endowment fund.

Attachment to Form FTB 3500

Exemption Application, re

The Ronald Reagan Presidential Foundation

- 9: g. It is not expected that there will be any "business enterprise". The "fund-raising" activities will presumably include contribution invitations by mail and by luncheon or dinner programs. All such activities will be the ultimate responsibility of The Trustees and Officers of the Foundation. A considerable period of time will be required for the development of such activities.
- h. The Foundation has not engaged in, sponsored or discontinued any activities.
- i. No leases have been entered into. No agreement has been made with any party for the development of any property.
- j. No literature has been sold or distributed, and there has been no advertising.

THE RONALD REAGAN PRESIDENTIAL FOUNDATION

Estimated Capital Expenditures, Endowment Fund and Annual Operating Budget

I. Capital Expenditures 1985 - 1989

A. Library/Museum

Building	\$18,560,000	
Furnishings	1,500,000	
Utilities	200,000	
Roadway	600,000	
Parking	140,000	
		\$21,000,000

B. Center for Public Affairs

Land and Building	\$27,000,000	
Furnishings	4,000,000	
Landscaping	500,000	
Utilities	300,000	
Roadway	150,000	
Parking	150,000	
		\$32,100,000

II. Endowment Fund \$40,000,000

III. Annual Operating Budget

A. Presidential Foundation 1985 - 1988

Office, administration and fund raising activities \$750,000

B. Library/Museum 1988 - 1989

Special Programs, such as oral history project, conferences, publications, grants-in-aid, (all operational expenses are paid by the U.S. Government.) \$500,000

C. Center for Public Affairs 1988 - 1989

Administration	\$500,000	
Overhead (building maintenance, security, utilities, etc.)	800,000	
Research (fellows and support staff)	2,500,000	
Conferences	1,500,000	
		\$5,300,000

DONEGAN, LOGAN AND DONEGAN

ATTORNEYS AT LAW

STANFORD PROFESSIONAL CENTER

SUITE 101-801 WELCH ROAD

PALO ALTO, CALIFORNIA 94304

JOHN M. DONEGAN
DONALD M. LOGAN
JOHN C. DONEGAN

TELEPHONE
(415) 326-4262

March 6, 1985

Franchise Tax Board
Sacramento, CA 95867

Attn: Mr. Peter Scheck
Exemption Audit Unit

Re: Exemption Application for
The Ronald Reagan Presidential Foundation
California Corporation No. 1269144

Dear Mr. Scheck:

This concerns Exemption Application, Form FTB 3500, filed on February 27, 1985, on behalf of the above-referenced Nonprofit Public Benefit Corporation.

Please convey my thanks to Mr. Donald Hareid for his assistance when I telephoned yesterday to notify that the IRS had approved exemption under IRC Section 501(c)(3).

As indicated by Mr. Hareid, I am enclosing the following:

1. True and correct copy of the exemption approval letter from IRS, dated March 5, 1985.
2. True and correct copy of the IRS Form 1023 which was executed by W. Glenn Campbell (Chairman of the Foundation, and Chairman of the Board of Trustees of the Foundation) on March 4, 1985. This provides some information additional to that contained in the FTB 3500 Form; please consider it as amending and/or supplementing that form. The enclosed copy of the IRS 1023 Form of course included copies of the Articles of Incorporation and the Bylaws; those Articles and Bylaws were identical with what was submitted to the Franchise Tax Board on February 27, 1985, but I am enclosing another copy of each in case this can be of any assistance.


On behalf of all concerned, it will be greatly appreciated if processing of this application can please be expedited as much as possible. We understand that it is probably faster

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March 6, 1985
Franchise Tax Board
Mr. Scheck

(and more reliable) to deliver by Federal Express than hand-delivery would be.

Thank you very much for your courtesy and cooperation.

Very truly yours,



John M. Donegan, Incorporator
and Attorney for The Ronald
Reagan Presidential Foundation

JMD:rp

Enclosures

Internal Revenue Service

Department of the Treasury

Washington, DC 20224

Mr. Richard T. Burress
46 Pearce Mitchell Place
Stanford, CA 94305

Person to Contact:

Telephone Number:

Refer Reply to:

OP:E:EO:R:1

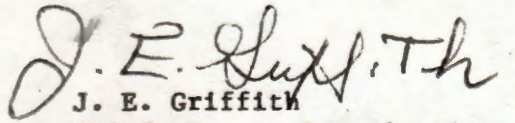
Date:

05 MAR 1985

Dear Mr. Burress:

The enclosed copy of a letter is sent to you under the provisions of a Power of Attorney, Authorization and Declaration, or other proper authorization currently on file with the Internal Revenue Service.

Sincerely yours,


J. E. Griffith
Chief, Exempt Organizations
Rulings Branch

Enclosure
Copy of letter

Internal Revenue Service

Department of the Treasury

Washington, DC 20224

The Ronald Reagan Presidential
Foundation
801 Welch Road, Suite 101
Palo Alto, CA 94304

Person to Contact:
B. Brockner
Telephone Number:
(202) 566-4757
Refer Reply to:
OP:E:EO:R:1
Date:

05 MAR 1985

Employer Identification Number: 77-0054631
Key District: San Francisco
Accounting Period Ending: December 31
Foundation Status Classification: 509(a)(1) and 170(b)(1)(A)(vi)
Advance Ruling Period Ends: December 31, 1986

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code.

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization described in the sections shown above.

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during the advance ruling period. This advance ruling period begins on the date of your inception and ends on the date shown above.

Within 90 days after your advance ruling period ends, furnish your key District Director information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as such from the date you were organized for purposes of sections 507(d) and 4940.

Grantors and donors may rely on the determination that you are not a private foundation until 90 days after your advance ruling period ends. If you submit the required information within the 90 days, grantors and donors may continue to rely on the advance determination until we make a final determination of your foundation status. However, if notice that you will no longer be treated as the type of organization shown above is

The Ronald Reagan Presidential
Foundation

published in the Internal Revenue Bulletin, grantors and donors may not rely on this advance determination after the date of such publication. Also, a grantor or donor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of the foundation classification shown above, or acquired knowledge that we had given notice that you would be removed from classification as the type of organization shown above.

If your sources of support, or your purposes, character, or method of operation change, please let your key district know so that office can consider the effect on your exempt status and foundation status. Also, you should inform your key District Director of all changes in your name or address.

Unless specifically excepted, beginning January 1, 1984, you must pay taxes under the Federal Insurance Contributions Act (social security taxes) for each employee who is paid \$100 or more in a calendar year. You are not required to pay tax under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other federal excise taxes. If you have questions about excise, employment, or other federal taxes, contact your key District Director.

Donors may deduct contributions to you as provided in Code section 170. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522.

You are required to file Form 990, Return of Organization Exempt from Income Tax, only if your gross receipts each year are normally more than \$25,000. (For tax years ending before December 31, 1982, organizations whose gross receipts are not normally more than \$10,000 are excused from filing Form 990.) For guidance in determining if your gross receipts are "normally" not more than the \$25,000 limit, see the instructions for the Form 990. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. There is a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513.

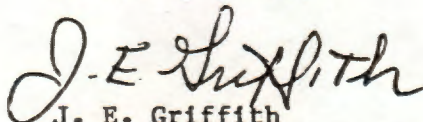
The Ronald Reagan Presidential
Foundation

Please show your employer identification number on all returns you file and in all correspondence with the Internal Revenue Service.

We are informing your key District Director of this ruling. Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions about this ruling, please contact the person whose name and telephone number are shown in the heading of this letter. For other matters, including questions concerning reporting requirements, please contact your key District Director.

Sincerely yours,

A handwritten signature in cursive script that reads "J. E. Griffith". The signature is written in dark ink and is positioned above the printed name.

J. E. Griffith
Chief, Exempt Organizations
Rulings Branch



STATE OF CALIFORNIA

FRANCHISE TAX BOARD

SACRAMENTO, CALIFORNIA 95867

Telephone: (800) 852-7050

In reply refer to
342: PTS:jw:g

March 12, 1985

The Ronald Reagan Presidential
Foundation
c/o Richard T. Burress/John M. Donegan
801 Welch Road, Suite 101
Palo Alto, CA 94304

Purpose	:	Charitable and Educational
Form of Organization	:	Corporation
Accounting Period Ending	:	December 31
Organization Number	:	1269144

On the basis of the information submitted and provided your present operations continue unchanged or conform to those proposed in your application, you are exempt from state franchise or income tax under Section 23701d, Revenue and Taxation Code. Any change in operation, character or purpose of the organization must be reported immediately to this office so that we may determine the effect on your exempt status. Any change of name or address also must be reported.

You are required to file Form 199 (Exempt Organization Annual Information Return) or Form 199B (Exempt Organization Annual Information Statement) on or before the 15th day of the 5th month (4-½ months) after the close of your accounting period. See annual instructions with forms for requirements.

You are not required to file state franchise or income tax returns unless you have income subject to the unrelated business income tax under Section 23731 of the Code. In this event, you are required to file Form 109 (Exempt Organization Business Income Tax Return) by the 15th day of the 5th month (4-½ months) after the close of your annual accounting period.

If the organization is incorporating, this approval will expire unless incorporation is completed with the Secretary of State within 60 days.

Exemption from federal income or other taxes and other state taxes requires separate applications.
*This exemption effective as of February 27, 1985.

M. Kokinos
Supervisor
Exempt Audit Unit

cc: Registrar of Charitable Trusts