

Form **990-EZ**

**Short Form  
Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

**2008**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

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

**A** For the 2008 calendar year, or tax year beginning **10/01/08**, and ending **9/30/09**

|  |   |  |  |
|--|---|--|--|
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Termination<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | Please use IRS label or print or type. See Specific Instructions. | <b>C</b> Name of organization<br><b>St. Thomas Historical Trust, Inc.</b>                                      | <b>D</b> Employer identification number<br><b>66-0423036</b> |
|  |   | Number and street (or P.O. box, if mail is not delivered to street address) Room/suite<br><b>P.O. Box 6707</b> | <b>E</b> Telephone number<br><b>340-774-5541</b>             |
|  |   | City or town, state or country, and ZIP + 4<br><b>St. Thomas VI 00804</b>                                      | <b>F</b> Group Exemption Number<br>..... ▶                   |

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

**G** Accounting method:  Cash  Accrual  
Other (specify) ▶

**I** Website: ▶ **www.stthomashistoricaltrust.org**

**J** Organization type (check only one)—  501(c) ( **3** ) ◀ (insert no.)  4947(a)(1) or  527

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

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

**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$1,000,000 or more, file Form 990 instead of Form 990-EZ ..... ▶ \$ **94,897**

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

|  |  |               |                |
|--|--|---------------|----------------|
| <b>Revenue</b>   | <b>1</b> Contributions, gifts, grants, and similar amounts received  | <b>1</b>      | <b>33,285</b>  |
|  | <b>2</b> Program service revenue including government fees and contracts   | <b>2</b>      |                |
|  | <b>3</b> Membership dues and assessments   | <b>3</b>      | <b>7,950</b>   |
|  | <b>4</b> Investment income   | <b>4</b>      | <b>1,138</b>   |
|  | <b>5a</b> Gross amount from sale of assets other than inventory  | <b>5a</b>     |                |
|  | <b>b</b> Less: cost or other basis and sales expenses  | <b>5b</b>     |                |
|  | <b>c</b> Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach sch.)   | <b>5c</b>     |                |
|  | <b>6</b> Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>        |               |                |
|  | <b>a</b> Gross revenue (not including \$ _____ of contributions reported on line 1)  | <b>6a</b>     | <b>44,585</b>  |
| <b>b</b> Less: direct expenses other than fundraising expenses                                   | <b>6b</b>  | <b>18,806</b> |                |
| <b>c</b> Net income or (loss) from special events and activities (Subtract line 6b from line 6a) | <b>6c</b>  | <b>25,779</b> |                |
| <b>7a</b> Gross sales of inventory, less returns and allowances                                  | <b>7a</b>  | <b>7,939</b>  |                |
| <b>b</b> Less: cost of goods sold  | <b>7b</b>  | <b>2,287</b>  |                |
| <b>c</b> Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)          | <b>7c</b>  | <b>5,652</b>  |                |
| <b>8</b> Other revenue (describe ▶ _____)  | <b>8</b>   |               |                |
| <b>9</b> Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8                                  | <b>9</b>   | <b>73,804</b> |                |
| <b>Expenses</b>  | <b>10</b> Grants and similar amounts paid (attach schedule)  | <b>10</b>     |                |
|  | <b>11</b> Benefits paid to or for members  | <b>11</b>     |                |
|  | <b>12</b> Salaries, other compensation, and employee benefits  | <b>12</b>     | <b>8,607</b>   |
|  | <b>13</b> Professional fees and other payments to independent contractors  | <b>13</b>     | <b>4,603</b>   |
|  | <b>14</b> Occupancy, rent, utilities, and maintenance  | <b>14</b>     | <b>7,142</b>   |
|  | <b>15</b> Printing, publications, postage, and shipping  | <b>15</b>     | <b>1,776</b>   |
|  | <b>16</b> Other expenses (describe ▶ <b>See Statement 2</b> )  | <b>16</b>     | <b>41,143</b>  |
| <b>17</b> Total expenses. Add lines 10 through 16  | <b>17</b>  | <b>63,271</b> |                |
| <b>Net Assets</b>  | <b>18</b> Excess or (deficit) for the year (Subtract line 17 from line 9)  | <b>18</b>     | <b>10,533</b>  |
|  | <b>19</b> Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) | <b>19</b>     | <b>95,414</b>  |
|  | <b>20</b> Other changes in net assets or fund balances (attach explanation)  | <b>20</b>     |                |
|  | <b>21</b> Net assets or fund balances at end of year. Combine lines 18 through 20  | <b>21</b>     | <b>105,947</b> |

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

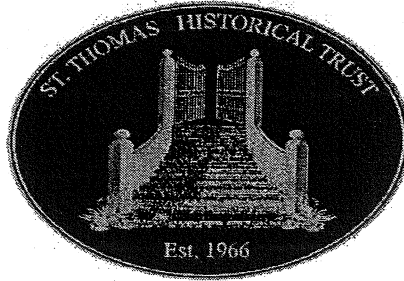
(See the instructions for Part II.)

|   | (A) Beginning of year | (B) End of year |
|---|-----------------------|-----------------|
| <b>22</b> Cash, savings, and investments  | <b>87,509</b>         | <b>101,982</b>  |
| <b>23</b> Land and buildings  | <b>6,131</b>          | <b>2,191</b>    |
| <b>24</b> Other assets (describe ▶ <b>See Statement 3</b> )                           | <b>1,774</b>          | <b>1,774</b>    |
| <b>25</b> Total assets  | <b>95,414</b>         | <b>105,947</b>  |
| <b>26</b> Total liabilities (describe ▶ _____)  | <b>0</b>              | <b>0</b>        |
| <b>27</b> Net assets or fund balances (line 27 of column (B) must agree with line 21) | <b>95,414</b>         | <b>105,947</b>  |

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

Form **990-EZ** (2008)





**Executive Committee**

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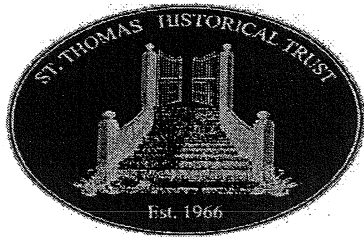
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St. Thomas, VI 00804-6218  
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St. Thomas, VI 00803-6777  
Email: [jaredian2@vipowernet.net](mailto:jaredian2@vipowernet.net)  
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(W) 340 777-1600  
(Fax) 340 777-1601  
(Cell) 340 514-3064

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

|     |   | Yes | No |
|-----|---|-----|----|
| 33  | Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity  |     | X  |
| 34  | Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes  |     | X  |
| 35  | If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.  |     |    |
| a   | Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?  |     | X  |
| b   | If "Yes," has it filed a tax return on Form 990-T for this year?  |     |    |
| 36  | Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N  |     | X  |
| 37a | Enter amount of political expenditures, direct or indirect, as described in the instr. <span style="float:right">▶ <b>37a</b></span>  |     |    |
| b   | Did the organization file Form 1120-POL for this year?  |     | X  |
| 38a | Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?   |     | X  |
| b   | If "Yes," complete Schedule L, Part II and enter the total amount involved <span style="float:right">▶ <b>38b</b></span>  |     |    |
| 39  | Section 501(c)(7) organizations. Enter:   |     |    |
| a   | Initiation fees and capital contributions included on line 9 <span style="float:right">▶ <b>39a</b></span>  |     |    |
| b   | Gross receipts, included on line 9, for public use of club facilities <span style="float:right">▶ <b>39b</b></span>   |     |    |
| 40a | Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ _____ ; section 4912 ▶ _____ ; section 4955 ▶ _____  |     |    |
| b   | Section 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I  |     | X  |
| c   | Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <span style="float:right">▶ _____</span>   |     |    |
| d   | Enter amount of tax on line 40c reimbursed by the organization <span style="float:right">▶ _____</span>   |     |    |
| e   | All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T  |     | X  |
| 41  | List the states with which a copy of this return is filed. ▶ <b>US Virgin Islands</b>   |     |    |
| 42a | The books are in care of ▶ <b>The Organization</b> Telephone no. ▶ <b>340-774-5541</b><br><b>P.O. Box 6707</b><br>Located at ▶ <b>St. Thomas, VI</b> ZIP + 4 ▶ <b>00804</b>   |     |    |
| b   | At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?<br>If "Yes," enter the name of the foreign country: ▶ _____<br>See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts. |     | X  |
| c   | At any time during the calendar year, did the organization maintain an office outside of the U.S.?<br>If "Yes," enter the name of the foreign country: ▶ _____  |     | X  |
| 43  | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here <span style="float:right">▶ <input type="checkbox"/></span><br>and enter the amount of tax-exempt interest received or accrued during the tax year <span style="float:right">▶ <b>43</b></span>   |     |    |
| 44  | Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ  |     | X  |
| 45  | Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ   |     | X  |

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

|   | Yes | No                                  |
|---|-----|-------------------------------------|
| 46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I |     | <input checked="" type="checkbox"/> |
| 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II   |     | <input checked="" type="checkbox"/> |
| 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E   |     | <input checked="" type="checkbox"/> |
| 49a Did the organization make any transfers to an exempt non-charitable related organization?   |     | <input checked="" type="checkbox"/> |
| b If "Yes," was the related organization(s) a section 527 organization?   |     |                                     |

| (a) Name and address of each employee paid more than \$100,000 | (b) Title and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
|--|--|------------------|---|--|
| None   |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
|  |  |                  |   |  |
| Total number of other employees paid over \$100,000            |  |                  |   |  |

| (a) Name and address of each independent contractor paid more than \$100,000 | (b) Type of service | (c) Compensation |
|--|---------------------|------------------|
| None   |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
|  |                     |                  |
| Total number of other independent contractors each receiving over \$100,000  |                     |                  |

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

**Sign Here**

Signature of officer: *Ronald Lockhart* Date: *2/16/10*

Type or print name and title: **RONALD LOCKHART, PRESIDENT**

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**Paid Preparer's Use Only**

Preparer's signature: *Katherine S. Gibson* Date: **1/29/10** Check if self-employed:  Preparer's Identifying Number (See instr.): **552-68-8414**

Firm's name (or yours if self-employed), address, and ZIP + 4: **Katherine S. Gibson, CPA, PC  
14 MAIN STREET - CAMILLE PISSARRO BLDG.  
ST. THOMAS, VI 00802** EIN: **66-0551458** Phone no.: **340-776-0640**

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

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No. 1545-0047

**2008**

Open to Public Inspection

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.

Department of the Treasury  
Internal Revenue Service

Name of the organization

**St. Thomas Historical Trust, Inc.**

Employer identification number

**66-0423036**

**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 a 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 to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box 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 it 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?
  - (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? .....
- h Provide the following information about the organizations the organization supports.

|          | Yes | No |
|----------|-----|----|
| 11g(i)   |     |    |
| 11g(ii)  |     |    |
| 11g(iii) |     |    |

| (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 |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
|                                    |          |   |   |    |  |    |   |    |                         |
| <b>Total</b>                       |          |   |   |    |  |    |   |    |                         |

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**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 any "unusual grants.")  |          |          |          |          |          |           |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf   |          |          |          |          |          |           |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge   |          |          |          |          |          |           |
| 4 <b>Total.</b> 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 <b>Public support.</b> 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 <b>Total support.</b> Add lines 7 through 10   |          |          |          |          |          |                          |
| 12 Gross receipts from related activities, etc. (see instructions)  |          |          |          |          | 12       |                          |
| 13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here |          |          |          |          |          | <input type="checkbox"/> |

**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 from 2007 Schedule A, Part IV-A, line 26f  | 15 | %                        |
| 16a <b>33 1/3 % support test—2008.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization   |    | <input type="checkbox"/> |
| b <b>33 1/3 % support test—2007.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization  |    | <input type="checkbox"/> |
| 17a <b>10%-facts-and-circumstances test—2008.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization    |    | <input type="checkbox"/> |
| b <b>10%-facts-and-circumstances test—2007.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization |    | <input type="checkbox"/> |
| 18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions  |    | <input type="checkbox"/> |



**Part III Support Schedule for Organizations Described in Section 509(a)(2)**  
(Complete only if you checked the box on line 9 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 |
|---|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")   | 32,854   | 20,191   | 81,150   | 92,218   | 41,235   | 267,648   |
| <b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose       | 31,772   | 29,309   | 34,850   | 20,882   | 52,524   | 169,337   |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513   |          |          |          |          |          |           |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf  |          |          |          |          |          |           |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge  |          |          |          |          |          |           |
| <b>6 Total.</b> Add lines 1-5   | 64,626   | 49,500   | 116,000  | 113,100  | 93,759   | 436,985   |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons  | 20,000   | 10,000   | 50,250   | 65,627   | 27,750   | 173,627   |
| <b>b</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 | 0        | 0        | 0        | 0        | 0        |           |
| <b>c</b> Add lines 7a and 7b  | 20,000   | 10,000   | 50,250   | 65,627   | 27,750   | 173,627   |
| <b>8 Public support</b> (Subtract line 7c from line 6.)   | 44,626   | 39,500   | 65,750   | 47,473   | 66,009   | 263,358   |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ►   | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
|---|----------|----------|----------|----------|----------|-----------|
| <b>9</b> Amounts from line 6  | 64,626   | 49,500   | 116,000  | 113,100  | 93,759   | 436,985   |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | 840      | 1,408    | 1,427    | 1,221    | 1,138    | 6,034     |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                          |          |          |          |          |          |           |
| <b>c</b> Add lines 10a and 10b  | 840      | 1,408    | 1,427    | 1,221    | 1,138    | 6,034     |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on     |          |          |          |          |          |           |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)                                 |          |          |          |          |          |           |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)  | 65,466   | 50,908   | 117,427  | 114,321  | 94,897   | 443,019   |

**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**

|  |    |           |
|--|----|-----------|
| <b>15</b> Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f)) | 15 | 59.4462 % |
| <b>16</b> Public support percentage from 2007 Schedule A, Part IV-A, line 27g                    | 16 | 66.6075 % |

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

|   |    |          |
|---|----|----------|
| <b>17</b> Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f)) | 17 | 1.3620 % |
| <b>18</b> Investment income percentage from 2007 Schedule A, Part IV-A, line 27h                      | 18 | 1.5797 % |

**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 line 19a, and line 16 is more than 33 1/3 %, and line 18 is not more than 33 1/3 %, check this box and stop here. The organization qualifies as a publicly supported organization  ►

**20 Private foundation.** If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions  ►



**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)  
Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No. 1545-0047

**2008**

Name of the organization

Employer identification number

**St. Thomas Historical Trust, Inc.**

**66-0423036**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( **3** ) (enter number) organization

4947(a)(1) nonexempt charitable trust not treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

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

**General Rule**

For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.

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

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ .....

**Caution.** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization **St. Thomas Historical Trust, Inc.** Employer identification number **66-0423036**

**Part I** Contributors (see instructions)

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c)<br>Aggregate contributions | (d)<br>Type of contribution   |
|------------|--|--------------------------------|---|
| 1          | Community Foundation of the VI<br>P.O. Box 11790<br>St. Thomas VI 00801-4790 | \$ 27,750                      | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| .....      | .....  | \$ .....                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| .....      | .....  | \$ .....                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| .....      | .....  | \$ .....                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| .....      | .....  | \$ .....                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| .....      | .....  | \$ .....                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |

Form **4562**  
 Department of the Treasury  
 Internal Revenue Service (99)

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

OMB No. 1545-0172

**2008**  
 Attachment Sequence No. **67**

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

Name(s) shown on return **St. Thomas Historical Trust, Inc.** Identifying number **66-0423036**

Business or activity to which this form relates

**Indirect Depreciation**

**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 instructions)                      | 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 | 391 |
| 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 | 1,168 |
| 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              |                                      |  |                     |                |            |                            |
| c 7-year property              |                                      | 332  | 7.0                 | HY             | 200DB      | 48                         |
| d 10-year property             |                                      |  |                     |                |            |                            |
| e 15-year property             |                                      | 60   | 15.0                | HY             | 150DB      | 3                          |
| f 20-year property             |                                      |  |                     |                |            |                            |
| 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 |       |
| 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 instr. | 22 | 1,610 |
| 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 |       |

For Paperwork Reduction Act Notice, see separate instructions.

Form **4562** (2008)

# Federal Statements

## Statement 1 - Form 990-EZ, Part I, Line 3 - Membership Dues and Assessments

| <u>Description</u> | <u>Amount</u> |
|--------------------|---------------|
| Membership Dues    | \$ 7,950      |
| Total              | \$ 7,950      |

66-0423036

**Federal Statements**

FYE: 9/30/2009

**Statement 2 - Form 990-EZ, Part I, Line 16 - Other Expenses**

| <u>Description</u>    | <u>Amount</u>    |
|-----------------------|------------------|
| Expenses              | \$               |
| Bank Service Charges  | 47               |
| Hassel Island Expense | 30,210           |
| Insurance             | 3,058            |
| Licenses & Permits    | 25               |
| Museum Expense        | 1,946            |
| Office Supplies       | 2,042            |
| Taxes - Payroll       | 593              |
| Workers Compensation  | 110              |
| Abandonment of LHI    | 3,112            |
| Total                 | <u>\$ 41,143</u> |

**Statement 3 - Form 990-EZ, Part II, Line 24 - Other Assets**

| <u>Description</u> | <u>Beginning of Year</u> | <u>End of Year</u> |
|--------------------|--------------------------|--------------------|
| Works of Art       | \$ 1,774                 | \$ 1,774           |
|                    | <u>1,774</u>             | <u>1,774</u>       |

**Statement 4 - Form 990-EZ, Part III - Organization's Primary Exempt Purpose****Description**

The mission of the Trust is to identify, protect and preserve the historical identity, structures and sites, and cultural heritage of St. Thomas through education, advocacy and promotion.

**Statement 5 - Form 990-EZ, Part III, Line 28 - Statement of Program Service Accomplishments****Description**

Hassel Island Initiative - Working with the US National Park Service the Trust has begun a project of preserving the historical sites and artifacts on Hassel Island for the Hassel Island National Park. Hassel Island is located in St. Thomas harbor and has a long military maritime history and had a pivotal role in servicing the earliest Europe to Americas trading vessels in the Caribbean. Many of the structures on Hassel Island are in deplorable condition and the St. Thomas Historical Trust's mission is to stabilize, preserve and restore them to make them accessible to residents and visitors to the US Virgin Islands.

**Statement 6 - Form 990-EZ, Part III, Line 29 - Statement of Program Service Accomplishments****Description**

Museum - The Trust operates a small museum in downtown Charlotte Amalie. The museum contains a collection of antique West Indian furniture, household utensils and maps. It is staffed by Trust Members who volunteer their time and it is open free to the public. It is well located to attract visitors who are curious to know more of the islands' history. During 2009 approximately 500 people visited the museum.

**Statement 7 - Form 990-EZ, Part III, Line 30 - Statement of Program Service Accomplishments****Description**

Lectures - The Trust sponsors lectures on the history of the Virgin Islands to school and church groups as well as to interested members of the community, residents and visitors alike.



**Statement 8 - Form 990-EZ, Part III, Line 31 - Statement of Program Service  
Accomplishments**

Description

License Plates - The Trust offers to St. Thomas drivers and license plate collectors a special license plate which has, as background, a reproduction of an old print of the town harbor. Not only has the project been an effective fundraiser, but it has also provided increased visibility within the community to the existence of the St. Thomas Historical Trust.