

**THE MUSEUM OF DANISH AMERICA**

**Financial Statements  
Year Ended August 31, 2017**

**OLSEN, MUHLBAUER & CO., L.L.P.**  
**Certified Public Accountants**  
**CARROLL, IOWA**

# THE MUSEUM OF DANISH AMERICA

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**OLSEN, MUHLBAUER & CO., L.L.P.**

*Certified Public Accountants*

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**INDEPENDENT AUDITORS' REPORT**

To the Board of Directors  
The Danish Immigrant Museum  
dba The Museum of Danish America  
Elk Horn, Iowa

We have audited the accompanying financial statements of The Museum of Danish America (a nonprofit organization), which comprise the statement of assets, liabilities, and net assets – modified cash basis as of August 31, 2017, and the related statements of revenue, expenses and changes in net assets – modified cash basis, and functional expenses – modified cash basis for the year then ended, and the related notes to the financial statements.

**Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with the modified cash basis of accounting as described in Note 1; this includes determining that the modified cash basis of accounting is an acceptable basis for the preparation of the financial statements in the circumstances. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

**Auditors' Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statement in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## Opinion

In our opinion the financial statements referred to above present fairly, in all material respects, the assets, liabilities, and net assets of The Museum of Danish America as of August 31, 2017, and its support, revenue, and expenses for the year then ended in accordance with the modified cash basis of accounting as described in Note 1.

## Emphasis of a Matter - Basis of Accounting

We draw attention to Note 1 of the financial statements, which describes the basis of accounting. The financial statements are prepared on the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to that matter.

## Report on Summarized Comparative Information

We have previously audited The Museum of Danish America's August 31, 2016, financial statements, and our report dated September 28, 2016, expressed an unmodified opinion on those audited financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended August 31, 2016, is consistent, in all material respects, with the audited financial statements from which it has been derived.

*Olsen, Muhlbauer & Co., LLP*

OLSEN, MUHLBAUER & CO., L.L.P.  
Certified Public Accountants

Carroll, Iowa  
October 13, 2017

THE MUSEUM OF DANISH AMERICA

Statement of Assets, Liabilities, and Net Assets -  
Modified Cash Basis

August 31, 2017 with Comparative Totals as of August 31, 2016

|  | <u>2017</u>       | <u>2016</u>      |
|--|-------------------|------------------|
| <b>Assets</b>  |                   |                  |
| Cash and Cash Equivalents                              | 156,636           | 3,648            |
| Design Shop Inventory                                  | 54,691            | 64,289           |
| Exhibit Catalogue and Promotional Inventory            | 33,139            | 35,246           |
| Property and Equipment (Net)                           | 4,600,425         | 4,715,828        |
| Cash and Investments Restricted for Long-term Purposes | 5,367,122         | 4,430,318        |
| Investments - Other                                    | 32,945            | 32,922           |
| Collections (Note 1)                                   | 0                 | 0                |
|  | <hr/>             | <hr/>            |
| <u>Total Assets</u>                                    | <u>10,244,958</u> | <u>9,282,251</u> |
| <br>   |                   |                  |
| <b>Liabilities</b>                                     |                   |                  |
| Accrued Payroll Taxes                                  | 0                 | 424              |
| Line of Credit   | 200,000           | 263,000          |
|  | <hr/>             | <hr/>            |
| <u>Total Liabilities</u>                               | <u>200,000</u>    | <u>263,424</u>   |
| <br>   |                   |                  |
| <b>Net Assets</b>                                      |                   |                  |
| Unrestricted   |                   |                  |
| Board Designated                                       | 1,134,314         | 1,124,314        |
| Undesignated   | 4,721,670         | 4,640,305        |
| Temporarily Restricted                                 | 204,736           | 182,564          |
| Permanently Restricted                                 | 3,984,238         | 3,071,644        |
|  | <hr/>             | <hr/>            |
| <u>Total Net Assets</u>                                | <u>10,044,958</u> | <u>9,018,827</u> |
| <br>   |                   |                  |
| <u>Total Liabilities and Net Assets</u>                | <u>10,244,958</u> | <u>9,282,251</u> |

The accompanying notes are an integral part of these financial statements.

THE MUSEUM OF DANISH AMERICA

Statement of Revenues, Expenses and Changes in Net Assets -  
Modified Cash Basis  
For Year Ended August 31, 2017 with Comparative Totals for 2016

|  | Unrestricted     | Temporarily<br>Restricted | Permanently<br>Restricted | Total             | 2016             |
|--|------------------|---------------------------|---------------------------|-------------------|------------------|
| Revenues, Gains and Net Assets   |                  |                           |                           |                   |                  |
| Released from Restrictions:  |                  |                           |                           |                   |                  |
| Contributions and Support  | 751,833          | 62,108                    | 912,594                   | 1,726,535         | 1,159,005        |
| Admissions   | 16,015           | 0                         | 0                         | 16,015            | 18,169           |
| Design Store Net Sales (Note 7)  | 52,921           | 0                         | 0                         | 52,921            | 51,211           |
| Interest and Dividends   | 76,288           | 0                         | 0                         | 76,288            | 70,552           |
| Realized Gain on Investments   | 74,898           | 0                         | 0                         | 74,898            | 78,237           |
| Unrealized Gain on Investments   | 296,485          | 0                         | 0                         | 296,485           | 94,395           |
| Loss on Disposal of Property<br>& Equipment                                | (40,769)         | 0                         | 0                         | (40,769)          | (18,920)         |
| Grants   | 144,428          | 26,813                    | 0                         | 171,241           | 37,000           |
| Miscellaneous Income   | 45,526           | 0                         | 0                         | 45,526            | 28,844           |
| Net Assets Released from<br>Restrictions:                                  | 66,749           | (66,749)                  | 0                         | 0                 | 0                |
| <u>Total Revenues, Gains and Net<br/>Assets Released from Restrictions</u> | <u>1,484,374</u> | <u>22,172</u>             | <u>912,594</u>            | <u>2,419,140</u>  | <u>1,518,493</u> |
| Expenses   |                  |                           |                           |                   |                  |
| Program Services   |                  |                           |                           |                   |                  |
| Collection Care  | 427,617          | 0                         | 0                         | 427,617           | 442,590          |
| Genealogy  | 122,846          | 0                         | 0                         | 122,846           | 138,636          |
| Public Outreach  | 144,251          | 0                         | 0                         | 144,251           | 152,910          |
| Design Store   | 140,449          | 0                         | 0                         | 140,449           | 150,305          |
| Bedstemor's House  | 7,636            | 0                         | 0                         | 7,636             | 7,888            |
|  | 842,799          | 0                         | 0                         | 842,799           | 892,329          |
| Supporting Activities  |                  |                           |                           |                   |                  |
| Management and General   | 422,078          | 0                         | 0                         | 422,078           | 381,642          |
| Fund Raising   | 128,132          | 0                         | 0                         | 128,132           | 125,519          |
|  | 550,210          | 0                         | 0                         | 550,210           | 507,161          |
| <u>Total Expenses</u>  | <u>1,393,009</u> | <u>0</u>                  | <u>0</u>                  | <u>1,393,009</u>  | <u>1,399,490</u> |
| <u>Change in Net Assets</u>  | <u>91,365</u>    | <u>22,172</u>             | <u>912,594</u>            | <u>1,026,131</u>  | <u>119,003</u>   |
| Net Assets, Beginning of Year  | 5,764,619        | 182,564                   | 3,071,644                 | 9,018,827         | 8,899,824        |
| <u>Net Assets, End of Year</u>   | <u>5,855,984</u> | <u>204,736</u>            | <u>3,984,238</u>          | <u>10,044,958</u> | <u>9,018,827</u> |

The accompanying notes are an integral part of these financial statements.

THE MUSEUM OF DANISH AMERICA

Statement of Functional Expenses -  
Modified Cash Basis  
For Year Ended August 31, 2017 with Comparative Totals for 2016

|                                 | Program Services   |                |                    |                 |                      | Supporting                |
|---------------------------------|--------------------|----------------|--------------------|-----------------|----------------------|---------------------------|
|                                 | Collection<br>Care | Genealogy      | Public<br>Outreach | Design<br>Store | Bedstemor's<br>House | Management and<br>General |
| Salaries                        | 111,755            | 58,300         | 88,453             | 47,485          | 3,723                | 149,879                   |
| Benefits and Taxes              | 31,990             | 16,181         | 18,292             | 16,330          | 285                  | 24,749                    |
| <b>Total Compensation</b>       | 143,745            | 74,481         | 106,745            | 63,815          | 4,008                | 174,628                   |
| <b>2016 - Memo Only</b>         | <b>160,216</b>     | <b>88,749</b>  | <b>107,293</b>     | <b>77,186</b>   | <b>2,556</b>         | <b>159,046</b>            |
| Advertising                     | 570                | 135            | 0                  | 0               | 135                  | 17,760                    |
| Bank Charges                    | 48                 | 0              | 0                  | 54              | 0                    | 44,615                    |
| Contract Labor/Outside Services | 1,030              | 0              | 0                  | 0               | 0                    | 600                       |
| Depreciation                    | 116,581            | 9,330          | 9,376              | 28,348          | 1,076                | 39,179                    |
| Donations                       | 0                  | 0              | 0                  | 0               | 0                    | 1,850                     |
| Equipment Expenses              | 0                  | 6,701          | 0                  | 0               | 0                    | 8,123                     |
| Grounds Care                    | 24,309             | 0              | 0                  | 0               | 0                    | 8,146                     |
| Insurance                       | 6,890              | 3,445          | 5,167              | 4,306           | 861                  | 10,335                    |
| Interest                        | 0                  | 0              | 0                  | 0               | 0                    | 1,256                     |
| Interns                         | 12,000             | 0              | 0                  | 0               | 0                    | 0                         |
| Maintenance                     | 33,369             | 300            | 3,034              | 9,101           | 681                  | 12,134                    |
| Meetings                        | 2,681              | 215            | 0                  | 0               | 0                    | 18,167                    |
| Memberships                     | 800                | 79             | 0                  | 0               | 0                    | 1,100                     |
| Office & Computer               | 4,399              | 8,868          | 670                | 1,960           | 0                    | 3,507                     |
| Other                           | 11,249             | 1,391          | 35                 | 1,965           | 0                    | 15,239                    |
| Postage and Freight             | 11,446             | 270            | 0                  | 7,081           | 0                    | 3,712                     |
| Printing                        | 2,554              | 20             | 0                  | 14,897          | 0                    | 23,155                    |
| Professional Fees               | 1,540              | 0              | 0                  | 0               | 0                    | 15,939                    |
| Reception and Events            | 0                  | 0              | 5,000              | 0               | 0                    | 2,708                     |
| Rent                            | 7,200              | 12,000         | 0                  | 0               | 0                    | 0                         |
| Supplies                        | 10,260             | 1,447          | 0                  | 0               | 0                    | 4,610                     |
| Travel                          | 10,724             | 160            | 12,238             | 553             | 0                    | 4,740                     |
| Telephone                       | 1,911              | 1,808          | 0                  | 2,410           | 0                    | 2,629                     |
| Utilities                       | 24,311             | 2,196          | 1,986              | 5,959           | 875                  | 7,946                     |
| <b>Total</b>                    | <b>427,617</b>     | <b>122,846</b> | <b>144,251</b>     | <b>140,449</b>  | <b>7,636</b>         | <b>422,078</b>            |
| <b>2016 - Memo Only</b>         | <b>442,590</b>     | <b>138,636</b> | <b>152,910</b>     | <b>150,305</b>  | <b>7,888</b>         | <b>381,642</b>            |

The accompanying notes are an integral part of these financial statements.

## NOTES TO FINANCIAL STATEMENTS



# THE MUSEUM OF DANISH AMERICA

## Notes to Financial Statements

August 31, 2017

### Note 1 – Nature of Activities and Significant Accounting Policies

#### Nature of Activities

The Danish Immigrant Museum (the Museum) was formed in 1983 to exhibit materials and to provide information to the public regarding the impact and contributions of immigrants from Denmark to the United States and is located in Elk Horn, Iowa. Artifacts and traditions are collected, preserved, studied and interpreted in order to preserve this rich heritage. During the fiscal year ended August 31, 2014, the Danish Immigrant Museum formally adopted a fictitious name, The Museum of Danish America, in order to embrace all aspects of Danish American culture and influence rather than focusing only on immigrants.

The Museum of Danish America's five program services are:

*Collection Care* - The Museum of Danish America celebrates Danish roots and American dreams through its curatorial activities. The department maintains a collection of approximately 40,000 artifacts, many of which are available on the museum's website through the "View Our Collection" extension.

*Genealogy* - The Genealogy Center collects print, microform and digital materials on Danish immigrants, Danish Americans, their communities and organizations, and provides information on relevant genealogical resources as well as research and translation services to the public in-house and long distance. In addition, a digital library provides the ability to browse collections and titles online.

*Public Outreach* - Public outreach activities bring the Museum's mission to its national audience and membership by engaging constituents at public festivals, lectures and presentations, workshops, and receptions across the country.

*Design Store* - The Design Store displays items reflecting the best in Danish design and books about Denmark and Danish-American relations.

*Bedstemor's House* - Maintenance, tours and promotion of a 19th century historical house.

#### Significant Accounting Policies

The financial statements of the Museum have been prepared on the modified cash basis of accounting, a comprehensive basis of accounting other than accounting principles generally accepted in the United States of America. The modified cash basis of accounting reports transactions on a cash basis modified to reflect certain accrual basis accounting adjustments such as capitalizing fixed assets and recording annual depreciation along with recording debt owed to banks. Revenue is recognized when received and does not account for promises to give. In addition, expenses incurred but unpaid at August 31, 2017, are not reflected in the accompanying modified cash basis of accounting financial statements.

# THE MUSEUM OF DANISH AMERICA

## Notes to Financial Statements August 31, 2017

### Note 1 – Nature of Activities and Significant Accounting Policies

#### Significant Accounting Policies (Continued)

*Use of Estimates.* The preparation of financial statements in conformity with the modified cash basis of accounting requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, revenues, and expenses during the period and as of the date of the financial statements. Actual results could differ from those estimates.

*Net Assets.* The financial statements report net assets and changes in net assets in three classes that are based upon the existence or absence of restrictions on use that are placed by its donors, as follows:

Unrestricted net assets are resources available to support operations. The only limits on the use of unrestricted net assets are the broad limits resulting from the nature of the organization, the environment in which it operates, the purposes specified in its corporate documents and its application for tax-exempt status, and any limits resulting from contractual agreements with creditors and others that are entered into in the course of its operations.

Temporarily restricted net assets are resources that are restricted by a donor for a particular purpose or future period. Unspent contributions are classified in this class if the donor limited their use, as are the unspent appreciation of its donor-restricted endowment funds. When a donor's restriction is satisfied, either by usage of the resources or by the passage of time, the expiration of the restriction is reported by reclassifying the net assets from temporarily restricted to unrestricted net assets. If a restriction is fulfilled in the same time period in which the contribution is received, the Museum reports the contribution as unrestricted.

Permanently restricted net assets are resources whose use is limited by donor-imposed restrictions that neither expire by being used in accordance with a donor's restriction nor by the passage of time.

All revenues and gains are reported as increases in unrestricted net assets in the Statement of Revenues, Expenses, and Changes in Net Assets - Modified Cash Basis unless the use of the related resources is subject to temporary or permanent donor restrictions. All expenses and net losses other than losses on endowment investments are reported as decreases in unrestricted net assets. Net losses on endowment investments reduce temporarily restricted net assets to the extent that net gains of the fund from prior years are unspent and classified there; remaining losses are classified as decreases in unrestricted net assets. If an endowment fund has no net gains from prior years, such as when a fund is newly established, net losses are classified as decreases in unrestricted net assets.

*Cash Equivalents.* The Museum considers all unrestricted short-term investments with an original maturity of three months or less to be cash equivalents unless the investments are held for meeting restrictions of a capital or endowment nature.

*Inventory.* Inventory, consisting of design store merchandise and exhibit catalogues, is stated at the lower of cost or market determined on a first-in, first-out basis by the Museum's personnel.

# THE MUSEUM OF DANISH AMERICA

## Notes to Financial Statements

August 31, 2017

### Note 1 – Nature of Activities and Significant Accounting Policies (Continued)

#### Significant Accounting Policies (Continued)

*Property and Equipment.* Property and equipment are recorded at cost unless donated. Donated property and equipment are recorded at their fair value on the date of receipt. Gifts of property and equipment are recorded as unrestricted support unless the donor explicitly specifies how the donated assets must be used. Currently, the Museum has no policy implying time restrictions on donated property. Property and equipment is capitalized if it has a cost of \$2,000 or more and a useful life when acquired of more than one year. Repairs and maintenance that do not significantly increase the useful life of the asset are expensed as incurred. Depreciation is provided on the straight-line method over a five to fifteen year period for furniture and equipment, fifteen to fifty years for buildings and permanent exhibits, and fifteen years for improvements.

Property and equipment are reviewed for impairment when a significant change in the asset's use or another indicator of possible impairment is present. An impairment loss of \$40,769 was recognized in the financial statements in the current period for a permanent exhibit that was replaced this year.

*Collections.* The Museum's collections, which were acquired through purchases and contributions since the Museum's inception, are not recognized as assets on the Statement of Assets, Liabilities, and Net Assets - Modified Cash Basis. Purchases of collection items are recorded as decreases in unrestricted net assets in the year acquired. Proceeds from deaccessions or insurance claims are reflected as increases in the appropriate net asset classes.

The Museum's collections consist of historically significant artifacts and art held for educational, research, and curatorial purposes. The items are cataloged, preserved, and cared for, and activities verifying their existence and assessing their condition are performed continuously. The collections are subject to a policy that requires proceeds from their sales to be used to acquire other collection items, conserve existing collection items, or to benefit the Museum's operations and programs.

*Contributions.* Contributions are recognized when received. All contributions are reported as increases in unrestricted net assets unless use of the contributed assets is specifically restricted by the donor. Amounts received that are restricted by the donor to use in future periods or for specific purposes are reported as increases in either temporarily restricted or permanently restricted net assets, consistent with the nature of the restriction.

*In-kind Donations.* The museum receives a significant amount of support in the form of goods and services from donors and volunteers in the museum's operations, fund raising, admissions desk, design store, and museum tours. Services that do not require specialized knowledge are not required to be reported on financial statements prepared on the modified cash basis of accounting. Accordingly, these financial statements do not reflect these contributions. If these contributions were recorded, revenues would increase by the fair value of the contributions. During the fiscal year ended August 31, 2017, in-kind contributions of \$17,266 were required to be recorded.

# THE MUSEUM OF DANISH AMERICA

## Notes to Financial Statements August 31, 2017

### Note 1 – Nature of Activities and Significant Accounting Policies (Continued)

#### Significant Accounting Policies (Continued)

*Expense recognition and allocation.* The cost of providing the museum's programs and other activities is summarized on a functional basis in the Statement of Revenues, Expenses and Changes in Net Assets - Modified Cash Basis and Functional Expenses - Modified Cash Basis. Expenses that can be identified with a specific program are charged directly to that program. Costs common to multiple functions have been allocated among the various functions benefited.

Management and general expenses include those costs that are not directly identifiable with any specific program, but which provide for the overall support and direction of the museum.

Fundraising costs are expensed as incurred, even though they may result in future contributions.

Additionally, advertising costs are expensed as incurred.

The Museum has elected to use the direct expensing method in accounting for planned major maintenance activities.

*Tax status.* The Museum is a not-for-profit organization that is exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code. The Museum is also a public charity under the IRC Sections 509(a) and 170(b)(1)(A)(vi). This allows for donations to the Museum to be deductible as charitable contributions. Tax years ending prior to August 31, 2014, are considered closed years.

The Museum accounts for uncertainties in accounting for income taxes using the guidance included in Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) Topic 740, Income Taxes. The Museum recognizes the effect of income tax positions only if those positions are more likely than not of being sustained. At August 31, 2017, the Museum had no uncertain tax positions.

### Note 2 – Investments and Fair Value of Financial Instruments

The Museum accounts for its assets measured at estimated fair value on a recurring and non-recurring basis in accordance with FASB ASC Topic 820, *Fair Value Measurements and Disclosures* (ASC 820). ASC 820 defines fair value, establishes a framework for measuring fair value, and enhances disclosures about fair value measurements.

ASC 820 defines the fair value as the price that would be received from selling an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. When determining the fair value measurements for assets and liabilities required or permitted to be recorded at fair value, the Museum considers the principal or most advantageous market in which it would transact and it considers the assumptions that market participants would use when pricing the asset or liability.

# THE MUSEUM OF DANISH AMERICA

## Notes to Financial Statements August 31, 2017

### Note 2 – Investments and Fair Value of Financial Instruments (Continued)

ASC 820 requires an entity to maximize the use of observable inputs and minimize the use of unobservable inputs when measuring fair value. ASC 820 establishes a fair value hierarchy based on the level of independent, objective evidence surrounding the inputs used to measure fair value.

A financial instrument's categorization within the fair value hierarchy is based upon the lowest level of input that is significant to the fair value measurement. ASC 820 prioritizes the inputs into three levels that may be used to measure fair value.

- Level 1: Fair value determined based on quoted prices in active markets for identical assets or liabilities.
- Level 2: Fair value determined using significant observable inputs, generally either quoted prices in active markets for similar assets or liabilities or quoted prices in markets that are not active.
- Level 3: Fair value determined using significant unobservable inputs, such as pricing models, discounted cash flows, or similar techniques.

The Museum's investments are classified as Level 1 as the instruments are actively traded and have quoted prices. The primary uses of fair value measures in the museum's financial statements are:

- Initial measurement of noncash gifts (e.g. investment assets).
- Recurring measurement of investments.

All investments held at August 31, 2017, have been classified as Level 1 investments. No Level 2 or Level 3 investments were held at August 31, 2017.

Investments shown on the next page consist of the following as of August 31, 2017:

THE MUSEUM OF DANISH AMERICA

Notes to Financial Statements  
August 31, 2017

Note 2 – Investments and Fair Value of Financial Instruments (Continued)

| <u>ASSETS</u>  | <u>Cost</u>      | <u>Fair Value<br/>(Level 1)</u> | <u>Unrealized<br/>Appreciation<br/>(Depreciation)</u> |
|--|------------------|---------------------------------|---|
| <b>Unrestricted:</b>   |                  |                                 |   |
| Cash & Money Market Accounts   | 3,437            | 3,437                           | 0   |
| Certificate of Deposit   | 29,508           | 29,508                          | 0   |
|  | <u>32,945</u>    | <u>32,945</u>                   | <u>0</u>  |
| <b>Temporarily Restricted:</b>                                       |                  |                                 |   |
| Cash & Money Market Accounts   | 393,368          | 393,368                         | 0   |
| Fixed Income Funds   | 16,445           | 16,719                          | 274   |
| Equity Mutual Funds  | 55,764           | 69,753                          | 13,989  |
|  | 465,577          | 479,840                         | 14,263  |
| Less: Endowment Monies Invested in<br>Temporarily Restricted Account | <u>(28,000)</u>  | <u>(28,000)</u>                 | <u>0</u>  |
|  | 437,577          | 451,840                         | 14,263  |
| <b>Permanently Restricted:</b>                                       |                  |                                 |   |
| DBIA Endowment Fund  | 28,000           | 28,000                          | 0   |
| Holger Danske Endowment Fund   |                  |                                 |   |
| Cash & Money Market Funds  | 23,368           | 23,368                          | 0   |
| Fixed Income Funds   | 215,518          | 220,323                         | 4,805   |
| Equity Mutual Funds  | 703,909          | 919,182                         | 215,273   |
| DIM Endowment Fund   |                  |                                 |   |
| Cash & Money Market Funds  | 56,406           | 56,406                          | 0   |
| Fixed Income Funds   | 1,260,351        | 1,263,282                       | 2,931   |
| Equity Mutual Funds  | 2,106,935        | 2,404,721                       | 297,786   |
|  | <u>4,394,487</u> | <u>4,915,282</u>                | <u>520,795</u>  |
|  | <u>4,865,009</u> | <u>5,400,067</u>                | <u>535,058</u>  |

# THE MUSEUM OF DANISH AMERICA

## Notes to Financial Statements

August 31, 2017

### Note 5 – Net Assets (Continued)

|  |                   |
|--|-------------------|
| Permanently Restricted Net Assets              |                   |
| Restricted to maintenance of artifacts         | 28,000            |
| Restricted to Holger Danske endowment          | 1,296,996         |
| Restricted to DIM endowment                    | <u>2,659,242</u>  |
| <u>Total Permanently Restricted Net Assets</u> | <u>3,984,238</u>  |
| <u>Total Net Assets</u>                        | <u>10,044,958</u> |

### Note 6 – Endowments

The museum's endowments consist of three funds consisting of resources provided by donors (referred to as donor-restricted endowment funds) and or by resources set aside by the Board of Directors to function as endowments (referred to as board-designated endowment funds). All donor restricted endowments are permanent endowments or funds that provide a perpetual source of support for the museum's activities. Net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

The state of Iowa enacted the Uniform Prudent Management of Institutional Funds Act (UPMIFA) effective April 11, 2008. UPMIFA establishes law for the management and investment of donor-restricted endowment funds. The Board of Directors of the museum has interpreted UPMIFA as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted permanent endowment funds unless there are explicit donor stipulations to the contrary. As a result of this interpretation, the museum classifies the original value of gifts to donor-restricted permanent endowments as permanently restricted net assets. The remaining portion of a donor-restricted permanent endowment fund is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the museum.

In accordance with UPMIFA, the Museum considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- The duration and preservation of the fund
- The purposes of the Museum and the donor-restricted endowment fund
- General economic conditions
- The possible effect of inflation and deflation
- The expected total return from income and the appreciation of investments
- Other resources of the Museum
- The investment policies of the Museum

THE MUSEUM OF DANISH AMERICA

Notes to Financial Statements  
August 31, 2017

Note 6 – Endowments (Continued)

The net asset composition of endowment funds as of August 31, 2017, is as follows:

|  | <u>Unrestricted</u>   | <u>Temporarily<br/>Restricted</u> | <u>Permanently<br/>Restricted</u> | <u>Total</u>            |
|--|-----------------------|-----------------------------------|-----------------------------------|-------------------------|
| <b>Donor-restricted</b>                |                       |                                   |                                   |                         |
| <b>permanent endowment funds</b>       |                       |                                   |                                   |                         |
| - DBIA Artifact Endowment              | 0                     | 0                                 | 28,000                            | 28,000                  |
| - Holger Danske Endowment *            | (144,232)             | 0                                 | 1,296,996                         | 1,152,764               |
| - DIM Endowment *                      | (40,620)              | 0                                 | 2,659,242                         | 2,618,622               |
| Total Donor-restricted funds           | <u>(184,852)</u>      | <u>0</u>                          | <u>3,984,238</u>                  | <u>3,799,386</u>        |
| <b>Board-designated endowment fund</b> |                       |                                   |                                   |                         |
| - Holger Danske Endowment *            | 10,109                | 0                                 | 0                                 | 10,109                  |
| - DIM Endowment *                      | 1,105,787             | 0                                 | 0                                 | 1,105,787               |
| Total Board-designated funds           | <u>1,115,896</u>      | <u>0</u>                          | <u>0</u>                          | <u>1,115,896</u>        |
| Total Endowment Funds                  | <u><u>931,044</u></u> | <u><u>0</u></u>                   | <u><u>3,984,238</u></u>           | <u><u>4,915,282</u></u> |

\* The total balance in the Holger Danske Endowment of \$1,162,873 and in the DIM Endowment of \$3,724,409 consists of both donor-restricted funds and board-designated funds.

Both the Holger Danske and DIM donor-restricted permanent endowment funds currently have less value than the amount of the original gifts (the permanently restricted portion of the funds). The deficiency results from cumulative withdrawals in excess of cumulative income, of \$191,896 at August 31, 2017, and is reported in unrestricted net assets of both the donor-restricted permanent endowment and Board-designated endowment funds shown above.

The Holger Danske Endowment spending and investment policies adopted by the Board of Directors of the Museum attempt to provide a predictable stream of funding to the Museum while seeking to maintain the purchasing power of the endowment assets. The investment policy establishes an achievable return through diversification of asset classes. The spending policy is to distribute an amount equal to 50% of the net income of the fund with additional withdrawals allowable if deemed necessary. Essentially, the Museum's objective is to maintain the purchasing power of the endowment assets as well as to provide additional real growth through new gifts and investment return.

The DIM Endowment spending and investment policies adopted by the Board of Directors of the Museum attempt to achieve a reasonable and adequate rate of growth while not incurring significant risk, produce reasonable income, and achieve growth. The investment policy establishes an achievable return through use of a moderate portfolio approach. The spending policy allows distribution of the fund's entire investment income and provides for invasion of principal with Board or Executive Committee approval. The Museum's objective is to provide growth exceeding inflation.



THE MUSEUM OF DANISH AMERICA

Notes to Financial Statements  
August 31, 2017

Note 6 – Endowments (Continued)

The changes in endowment net assets for the year ended August 31, 2017, are as follows:

|   | <u>Unrestricted</u>   | <u>Temporarily<br/>Restricted</u> | <u>Permanently<br/>Restricted</u> | <u>Total</u>            |
|---|-----------------------|-----------------------------------|-----------------------------------|-------------------------|
| Endowment Net Assets -<br>August 31, 2016 | <u>933,326</u>        | <u>0</u>                          | <u>3,071,644</u>                  | <u>4,004,970</u>        |
| Investment Return -                       |                       |                                   |                                   |                         |
| Investment Income                         | 109,620               | 0                                 | 0                                 | 109,620                 |
| Realized Gains                            | 35,693                | 0                                 | 0                                 | 35,693                  |
| Unrealized Losses                         | 292,244               | 0                                 | 0                                 | 292,244                 |
| Fees                                      | <u>(37,228)</u>       | <u>0</u>                          | <u>0</u>                          | <u>(37,228)</u>         |
| Total Investment Return                   | <u>400,329</u>        | <u>0</u>                          | <u>0</u>                          | <u>400,329</u>          |
| Contributions                             | <u>10,000</u>         | <u>0</u>                          | <u>912,594</u>                    | <u>922,594</u>          |
| Board Releases                            | <u>(412,611)</u>      | <u>0</u>                          | <u>0</u>                          | <u>(412,611)</u>        |
| Endowment Net Assets -<br>August 31, 2017 | <u><u>931,044</u></u> | <u><u>0</u></u>                   | <u><u>3,984,238</u></u>           | <u><u>4,915,282</u></u> |

Note 7 – Design Store

Design Store revenues are reported net of discounts and returns in the Statement of Revenues, Expenses and Changes in Net Assets - Modified Cash Basis. Gross profit information is as follows:

|                     |                      |
|---------------------|----------------------|
| Gross Sales         | 113,075              |
| Discounts           | <u>( 9,740)</u>      |
| Net Sales           | 103,335              |
| Cost of Goods Sold  | <u>( 50,414)</u>     |
| <u>Gross Profit</u> | <u><u>52,921</u></u> |

Shipping and handling costs on both incoming and outgoing orders are included on the Statement of Functional Expenses in the Design Store's postage and freight expense.

THE MUSEUM OF DANISH AMERICA

Notes to Financial Statements  
August 31, 2017

Note 8 – Leases

The Museum leases intern living quarters and storage units under automatically renewable month-to-month leases. The Museum also has certain office equipment under non-cancelable leases expiring in the fiscal year ending August 31, 2022. In addition, the Museum leases office space under a twenty-four month non-cancelable operating lease which will expire in May, 2019. Rental expense amounted to approximately \$25,711 for the year ended August 31, 2017 and is reported on the Statement of Functional Expenses as Rent, Equipment Expenses and Other Expenses. The approximate minimum rental commitment under non-cancelable operating leases in effect is as follows as of August 31,:

|      |        |
|------|--------|
| 2018 | 13,068 |
| 2019 | 4,068  |
| 2020 | 4,068  |
| 2021 | 4,068  |
| 2022 | 3,338  |

Note 9 – Concentrations of Credit Risk

Amounts held in financial institutions are in excess of the Federal Deposit Insurance Corporation limits. At August 31, 2017, funds amounting \$520,087 were uninsured. The Museum's investments are subject to various risks, such as interest rate, credit and overall market volatility risks. Further, because of the significance of the investments to the museum's financial position and the level of risk inherent in most investments, it is reasonably possible that changes in the values of these investments could occur in the near term and such changes could materially affect the amounts reported in the financial statements. Management believes that its credit risk is not significant.

Note 10 – Related Party Transactions

During the year ended August 31, 2017, the Museum received \$63,277 from board members and staff.

Note 11 – Prior Year Information

Prior year information has been summarized and is not a complete presentation in conformity with the modified cash basis of accounting.

THE MUSEUM OF DANISH AMERICA

Notes to Financial Statements  
August 31, 2017

Note 12 – Subsequent Events

The Museum has considered subsequent events through October 13, 2017, which is the date the financial statements were available to be issued.

In September, 2017, the Museum swept earnings from the Holger Danske endowment account. The earnings sweep amounted to \$114,091.

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

# Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)  
Do not enter social security numbers on this form as it may be made public  
Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990)

OMB No 1545-0047  
**2016**  
Open to Public Inspection

**A For the 2016 calendar year, or tax year beginning 09-01-2016, and ending 08-31-2017**

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

**C** Name of organization  
THE DANISH IMMIGRANT MUSEUM

Doing business as  
THE MUSEUM OF DANISH AMERICA

Number and street (or P O box if mail is not delivered to street address) Room/suite  
2212 WASHINGTON ST

City or town, state or province, country, and ZIP or foreign postal code  
ELK HORN, IA 51531

**D** Employer identification number  
42-1204613

**E** Telephone number  
(712) 764-7001

**G** Gross receipts \$ 4,259,205

**F** Name and address of principal officer  
RASMUS THOEGERSEN  
100 SOUTH 19TH STREET 607  
OMAHA, NE 68102

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

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

**J** Website: ▶ WWW.DANISHMUSEUM.ORG

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

**L** Year of formation 1983 **M** State of legal domicile IA

**Part I Summary**

**1** Briefly describe the organization's mission or most significant activities  
CELEBRATING DANISH ROOTS AND AMERICAN DREAMS A STRIKING MODERN HALF-TIMBERED BUILDING SITUATED ON 30-ACRES IN WESTERN IOWA'S ROLLING HILLS HOUSES EXTENSIVE ARTIFACT COLLECTIONS, PERMANENT, AND TRAVELING EXHIBITS

**2** Check this box  if the organization discontinued its operations or disposed of more than 25% of its net assets

|  |    |
|--|----|
| <b>3</b> Number of voting members of the governing body (Part VI, line 1a)             | 25 |
| <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) | 25 |
| <b>5</b> Total number of individuals employed in calendar year 2016 (Part V, line 2a)  | 24 |
| <b>6</b> Total number of volunteers (estimate if necessary)                            | 85 |
| <b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12         | 0  |
| <b>7b</b> Net unrelated business taxable income from Form 990-T, line 34               |    |

|  | Prior Year   | Current Year |
|--|--|--------------|
|  | <b>8</b> Contributions and grants (Part VIII, line 1h) | 1,196,005    |
| <b>9</b> Program service revenue (Part VIII, line 2g)                                      | 47,013   | 46,167       |
| <b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d )                   | 129,869  | 110,417      |
| <b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)         | 51,211   | 52,921       |
| <b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 1,424,098  | 2,109,289    |

|   |           |           |
|---|-----------|-----------|
| <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3 )                 | 17,884    | 0         |
| <b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)                     |           | 0         |
| <b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | 659,692   | 633,352   |
| <b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)                    |           | 0         |
| <b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶128,132                 |           |           |
| <b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)                      | 721,913   | 746,297   |
| <b>18</b> Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)          | 1,399,489 | 1,379,649 |
| <b>19</b> Revenue less expenses Subtract line 18 from line 12                               | 24,609    | 729,640   |

|   | Beginning of Current Year                | End of Year |
|---|--|-------------|
|   | <b>20</b> Total assets (Part X, line 16) | 9,282,252   |
| <b>21</b> Total liabilities (Part X, line 26)                       | 263,424                                  | 200,000     |
| <b>22</b> Net assets or fund balances Subtract line 21 from line 20 | 9,018,828                                | 10,044,958  |

**Part II Signature Block**

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

**Sign Here**  
Signature of officer: \*\*\*\*\*  
Date: 2017-11-02  
RASMUS THOEGERSEN EXEC DIR  
Type or print name and title

**Paid Preparer Use Only**  
Print/Type preparer's name: TAMMY M BRUCH  
Preparer's signature: TAMMY M BRUCH  
Date: 2017-11-02  
Check  if self-employed  
PTIN: P00185181  
Firm's name: OLSEN MUHLBAUER & CO LLP  
Firm's EIN: 42-0950074  
Firm's address: PO BOX 545  
Phone no: (712) 792-4314  
CARROLL, IA 51401

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

**Part III Statement of Program Service Accomplishments**

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

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

CELEBRATING DANISH ROOTS AND AMERICAN DREAMS A STRIKING MODERN HALF-TIMBERED BUILDING SITUATED ON 30-ACRES IN WESTERN IOWA'S ROLLING HILLS HOUSES EXTENSIVE ARTIFACT COLLECTIONS, PERMANENT, AND TRAVELING EXHIBITS

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No

If "Yes," describe these new services on Schedule O

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No

If "Yes," describe these changes on Schedule O

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

**4a** (Code ) (Expenses \$ 415,639 including grants of \$ ) (Revenue \$ 31,091 )

See Additional Data

**4b** (Code ) (Expenses \$ 122,846 including grants of \$ ) (Revenue \$ 15,076 )

See Additional Data

**4c** (Code ) (Expenses \$ 144,251 including grants of \$ ) (Revenue \$ )

See Additional Data

(Code ) (Expenses \$ 148,085 including grants of \$ ) (Revenue \$ )

THE DESIGN STORE DISPLAYS ITEMS AND SELLS ITEMS REFLECTING THE BEST IN DANISH DESIGN AND BOOKS ABOUT DENMARK AND DANISH-AMERICAN RELATIONS INVENTORY IS SELECTED THAT REFLECTS THE MUSEUM'S MISSION OF EDUCATING AND INFORMING ITS PUBLIC AND INCLUDES ITEMS FROM FURNITURE TO LIGHTING TO JEWELRY AND HOME INTERIOR DECORATION AND BOOKS RANGING FROM ACADEMIC STUDIES TO ENTERTAINING FOLKLORE TOURS & PROMOTION OF A 19TH CENTURY HISTORICAL DANISH HOUSE

**4d** Other program services (Describe in Schedule O )  
(Expenses \$ 148,085 including grants of \$ ) (Revenue \$ )

**4e Total program service expenses** ▶ 830,821

**Part IV Checklist of Required Schedules**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> . . . . .   | Yes |    |
| <b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)? . . . . .   | Yes |    |
| <b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> . . . . .  |     | No |
| <b>4 Section 501(c)(3) organizations.</b><br>Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> . . . . .   |     | No |
| <b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i> . . . . .   |     | No |
| <b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i> . . . . .  |     | No |
| <b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> . . . . .  |     | No |
| <b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> . . . . .   | Yes |    |
| <b>9</b> Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i> . . . . .             |     | No |
| <b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> . . . . .   | Yes |    |
| <b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable  |     |    |
| <b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> . . . . .   | Yes |    |
| <b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i> . . . . .   |     | No |
| <b>c</b> Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i> . . . . .   |     | No |
| <b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i> . . . . .  |     | No |
| <b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> . . . . .   |     | No |
| <b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i> . . . . .  |     | No |
| <b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> . . . . .  |     | No |
| <b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> . . . . .   |     | No |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> . . . . .  |     | No |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .  |     | No |
| <b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i> . . . . . |     | No |
| <b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i> . . . . .   |     | No |
| <b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i> . . . . .   |     | No |
| <b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i> (see instructions) . . . . .  |     | No |
| <b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> . . . . .   |     | No |
| <b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> . . . . .   |     | No |

**Part IV Checklist of Required Schedules** (continued)

|  | Yes | No |
|--|-----|----|
| <b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H . . . . .</i>  |     | No |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?  |     |    |
| <b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II . . . . .</i>   |     | No |
| <b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III . . . . .</i>   |     | No |
| <b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J . . . . .</i>  | Yes |    |
| <b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . . . .</i>                           |     | No |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .   |     |    |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .  |     |    |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .   |     |    |
| <b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I . . . . .</i>   |     | No |
| <b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I . . . . .</i>  |     | No |
| <b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II . . . . .</i>                                 |     | No |
| <b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III . . . . .</i> |     | No |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)   |     |    |
| <b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV . . . . .</i>  |     | No |
| <b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV . . . . .</i>   |     | No |
| <b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV . . . . .</i>   |     | No |
| <b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M . . . . .</i>  |     | No |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M . . . . .</i>  | Yes |    |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I . . . . .</i>  |     | No |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II . . . . .</i>  |     | No |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I . . . . .</i>  |     | No |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . . . .</i>  |     | No |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?   |     | No |
| <b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2 . . . . .</i>  |     |    |
| <b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2 . . . . .</i>  |     | No |
| <b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI . . . . .</i>   |     | No |
| <b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .  | Yes |    |

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

Table with columns for question number, question text, and Yes/No response boxes. Includes sections for backup withholding, employee reporting, foreign accounts, prohibited transactions, charitable contributions, and organizational compliance.



Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O See instructions

Check if Schedule O contains a response or note to any line in this Part VI [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a (25), 1b (25), 2, 3, 4, 5, 6, 7a, 7b, 8a, 8b, 9.

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

Table with 3 columns: Question, Yes, No. Rows include: 10a, 10b, 11a, 11b, 12a, 12b, 12c, 13, 14, 15a, 15b, 16a, 16b.

Section C. Disclosure

Table with 3 columns: Question, Yes, No. Rows include: 17, 18, 19, 20.





**Part VIII Statement of Revenue**

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

|  |   | (A)<br>Total revenue | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from<br>tax under sections<br>512-514 |
|--|---|----------------------|--|---|--|
| <b>Contributions, Gifts, Grants and Other Similar Amounts</b>                | <b>1a</b> Federated campaigns . . . . .   | <b>1a</b>            |  |   |  |
|  | <b>b</b> Membership dues . . . . .  | <b>1b</b>            |  |   |  |
|  | <b>c</b> Fundraising events . . . . .   | <b>1c</b>            |  |   |  |
|  | <b>d</b> Related organizations . . . . .  | <b>1d</b>            |  |   |  |
|  | <b>e</b> Government grants (contributions)  | <b>1e</b>            | 92,500   |   |  |
|  | <b>f</b> All other contributions, gifts, grants, and similar amounts not included above   | <b>1f</b>            | 1,807,284  |   |  |
|  | <b>g</b> Noncash contributions included in lines 1a-1f \$ _____   |                      | 2,017  |   |  |
|  | <b>h Total.</b> Add lines 1a-1f . . . . .   |                      | 1,899,784  |   |  |
| <b>Program Service Revenue</b>   |   | Business Code        |  |   |  |
|  | <b>2a</b> RESEARCH, EXHIBIT & MTG FEES  |                      | 45,526   | 45,526                                  |  |
|  | <b>b</b> ADMISSIONS   |                      | 16,015   | 16,015                                  |  |
|  | <b>c</b> LESS MTG FEES - DONATIONS  |                      | -15,374  | -15,374                                 |  |
|  | <b>d</b> _____  |                      |  |   |  |
|  | <b>e</b> _____  |                      |  |   |  |
|  | <b>f</b> All other program service revenue  |                      | 46,167   |   |  |
| <b>g Total.</b> Add lines 2a-2f . . . . .                                    |   | 46,167               |  |   |  |
| <b>Other Revenue</b>   | <b>3</b> Investment income (including dividends, interest, and other similar amounts) . . . . .   |                      | 76,288   |   | 76,288   |
|  | <b>4</b> Income from investment of tax-exempt bond proceeds . . . . .   |                      |  |   |  |
|  | <b>5</b> Royalties . . . . .  |                      |  |   |  |
|  | <b>6a</b> Gross rents   | (i) Real             | (ii) Personal                                      |   |  |
|  | <b>b</b> Less rental expenses   |                      |  |   |  |
|  | <b>c</b> Rental income or (loss)  |                      |  |   |  |
|  | <b>d</b> Net rental income or (loss) . . . . .  |                      |  |   |  |
|  | <b>7a</b> Gross amount from sales of assets other than inventory  | (i) Securities       | (ii) Other   |   |  |
|  |   | 2,097,715            | 35,916   |   |  |
|  | <b>b</b> Less cost or other basis and sales expenses  | 2,058,733            | 40,769   |   |  |
|  | <b>c</b> Gain or (loss)   | 38,982               | -4,853   |   |  |
|  | <b>d</b> Net gain or (loss) . . . . .   |                      | 34,129   | -1,787                                  | 35,916   |
|  | <b>8a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18 . . . . . | <b>a</b>             |  |   |  |
|  | <b>b</b> Less direct expenses . . . . .   | <b>b</b>             |  |   |  |
|  | <b>c</b> Net income or (loss) from fundraising events . . . . .   |                      |  |   |  |
| <b>9a</b> Gross income from gaming activities See Part IV, line 19 . . . . . | <b>a</b>  |                      |  |   |  |
| <b>b</b> Less direct expenses . . . . .                                      | <b>b</b>  |                      |  |   |  |
| <b>c</b> Net income or (loss) from gaming activities . . . . .               |   |                      |  |   |  |
| <b>10a</b> Gross sales of inventory, less returns and allowances . . . . .   | <b>a</b>  | 103,335              |  |   |  |
| <b>b</b> Less cost of goods sold . . . . .                                   | <b>b</b>  | 50,414               |  |   |  |
| <b>c</b> Net income or (loss) from sales of inventory . . . . .              |   | 52,921               | 52,921   |   |  |
| Miscellaneous Revenue  | Business Code   |                      |  |   |  |
| <b>11a</b> _____   |   |                      |  |   |  |
| <b>b</b> _____   |   |                      |  |   |  |
| <b>c</b> _____   |   |                      |  |   |  |
| <b>d</b> All other revenue . . . . .   |   |                      |  |   |  |
| <b>e Total.</b> Add lines 11a-11d . . . . .                                  |   |                      |  |   |  |
| <b>12 Total revenue.</b> See Instructions . . . . .                          |   | 2,109,289            | 97,301   | 112,204                                 |  |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

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

| <b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>   | <b>(A)</b><br>Total expenses | <b>(B)</b><br>Program service expenses | <b>(C)</b><br>Management and general expenses | <b>(D)</b><br>Fundraising expenses |
|---|------------------------------|--|---|------------------------------------|
| <b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.  |                              |  |   |                                    |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22.   |                              |  |   |                                    |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, line 15 and 16.   |                              |  |   |                                    |
| <b>4</b> Benefits paid to or for members.   |                              |  |   |                                    |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees.  |                              |  |   |                                    |
| <b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).   |                              |  |   |                                    |
| <b>7</b> Other salaries and wages.  | 512,130                      | 309,716                                | 149,879                                       | 52,535                             |
| <b>8</b> Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions).   |                              |  |   |                                    |
| <b>9</b> Other employee benefits.   | 82,044                       | 59,385                                 | 13,283  | 9,376                              |
| <b>10</b> Payroll taxes.  | 39,178                       | 23,693                                 | 11,466  | 4,019                              |
| <b>11</b> Fees for services (non-employees)   |                              |  |   |                                    |
| <b>a</b> Management.  |                              |  |   |                                    |
| <b>b</b> Legal.   | 3,483                        | 1,540                                  | 1,943   |                                    |
| <b>c</b> Accounting.  | 13,996                       |  | 13,996  |                                    |
| <b>d</b> Lobbying.  |                              |  |   |                                    |
| <b>e</b> Professional fundraising services. See Part IV, line 17.   |                              |  |   |                                    |
| <b>f</b> Investment management fees.  | 44,615                       |  | 44,615  |                                    |
| <b>g</b> Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).  | 16,530                       | 13,030                                 |   | 3,500                              |
| <b>12</b> Advertising and promotion.  | 17,212                       | 840                                    | 16,372  |                                    |
| <b>13</b> Office expenses.  | 134,468                      | 69,181                                 | 37,613  | 27,674                             |
| <b>14</b> Information technology.   | 14,824                       | 6,701                                  | 8,123   |                                    |
| <b>15</b> Royalties.  |                              |  |   |                                    |
| <b>16</b> Occupancy.  | 147,409                      | 114,163                                | 28,226  | 5,020                              |
| <b>17</b> Travel.   | 33,045                       | 23,675                                 | 4,740   | 4,630                              |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials.   |                              |  |   |                                    |
| <b>19</b> Conferences, conventions, and meetings.   | 30,903                       | 7,896                                  | 20,875  | 2,132                              |
| <b>20</b> Interest.   | 1,256                        |  | 1,256   |                                    |
| <b>21</b> Payments to affiliates.   |                              |  |   |                                    |
| <b>22</b> Depreciation, depletion, and amortization.  | 213,271                      | 164,711                                | 39,184  | 9,376                              |
| <b>23</b> Insurance.  | 34,449                       | 20,669                                 | 10,335  | 3,445                              |
| <b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)   |                              |  |   |                                    |
| <b>a</b> MISCELLANEOUS  | 36,417                       | 14,742                                 | 15,840  | 5,835                              |
| <b>b</b> MEMBERSHIPS  | 2,569                        | 879                                    | 1,100   | 590                                |
| <b>c</b> CONTRIBUTIONS  | 1,850                        |  | 1,850   |                                    |
| <b>d</b>  |                              |  |   |                                    |
| <b>e</b> All other expenses   |                              |  |   |                                    |
| <b>25</b> Total functional expenses. Add lines 1 through 24e.   | 1,379,649                    | 830,821                                | 420,696                                       | 128,132                            |
| <b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.<br>Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) |                              |  |   |                                    |

**Part X Balance Sheet**

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

|   |   | (A)<br>Beginning of year |            | (B)<br>End of year |
|---|---|--------------------------|------------|--------------------|
| <b>Assets</b>   | <b>1</b> Cash—non-interest-bearing . . . . .  | 3,648                    | <b>1</b>   | 156,636            |
|   | <b>2</b> Savings and temporary cash investments . . . . .   | 386,196                  | <b>2</b>   | 424,540            |
|   | <b>3</b> Pledges and grants receivable, net . . . . .   |                          | <b>3</b>   |                    |
|   | <b>4</b> Accounts receivable, net . . . . .   |                          | <b>4</b>   |                    |
|   | <b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L   |                          | <b>5</b>   |                    |
|   | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L |                          | <b>6</b>   |                    |
|   | <b>7</b> Notes and loans receivable, net . . . . .  |                          | <b>7</b>   |                    |
|   | <b>8</b> Inventories for sale or use . . . . .  | 99,535                   | <b>8</b>   | 87,830             |
|   | <b>9</b> Prepaid expenses and deferred charges . . . . .  |                          | <b>9</b>   |                    |
|   | <b>10a</b> Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D  | 6,936,570                |            |                    |
|   | <b>b</b> Less accumulated depreciation  | 2,344,089                |            |                    |
|   |   | 4,707,184                | <b>10c</b> | 4,592,481          |
|   | <b>11</b> Investments—publicly traded securities . . . . .  | 4,077,044                | <b>11</b>  | 4,975,527          |
|   | <b>12</b> Investments—other securities See Part IV, line 11 . . . . .   |                          | <b>12</b>  |                    |
|   | <b>13</b> Investments—program-related See Part IV, line 11 . . . . .  |                          | <b>13</b>  |                    |
|   | <b>14</b> Intangible assets . . . . .   | 8,645                    | <b>14</b>  | 7,944              |
| <b>15</b> Other assets See Part IV, line 11 . . . . .                         |   | <b>15</b>                |            |                    |
| <b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . . | 9,282,252   | <b>16</b>                | 10,244,958 |                    |
| <b>Liabilities</b>  | <b>17</b> Accounts payable and accrued expenses . . . . .   | 424                      | <b>17</b>  |                    |
|   | <b>18</b> Grants payable . . . . .  |                          | <b>18</b>  |                    |
|   | <b>19</b> Deferred revenue . . . . .  |                          | <b>19</b>  |                    |
|   | <b>20</b> Tax-exempt bond liabilities . . . . .   |                          | <b>20</b>  |                    |
|   | <b>21</b> Escrow or custodial account liability Complete Part IV of Schedule D  |                          | <b>21</b>  |                    |
|   | <b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L . . . . .   |                          | <b>22</b>  |                    |
|   | <b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .  | 263,000                  | <b>23</b>  | 200,000            |
|   | <b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .  |                          | <b>24</b>  |                    |
|   | <b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D  |                          | <b>25</b>  |                    |
|   | <b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .  | 263,424                  | <b>26</b>  | 200,000            |
| <b>Net Assets or Fund Balances</b>  | <b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>  |                          |            |                    |
|   | <b>27</b> Unrestricted net assets   | 5,764,620                | <b>27</b>  | 5,855,984          |
|   | <b>28</b> Temporarily restricted net assets . . . . .   | 182,564                  | <b>28</b>  | 204,736            |
|   | <b>29</b> Permanently restricted net assets   | 3,071,644                | <b>29</b>  | 3,984,238          |
|   | <b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>   |                          |            |                    |
|   | <b>30</b> Capital stock or trust principal, or current funds . . . . .  |                          | <b>30</b>  |                    |
|   | <b>31</b> Paid-in or capital surplus, or land, building or equipment fund . . . . .   |                          | <b>31</b>  |                    |
|   | <b>32</b> Retained earnings, endowment, accumulated income, or other funds  |                          | <b>32</b>  |                    |
| <b>33</b> Total net assets or fund balances . . . . .                         | 9,018,828   | <b>33</b>                | 10,044,958 |                    |
| <b>34</b> Total liabilities and net assets/fund balances . . . . .            | 9,282,252   | <b>34</b>                | 10,244,958 |                    |

**Part XI Reconciliation of Net Assets**

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

|           |   |           |            |
|-----------|---|-----------|------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12) . . . . .   | <b>1</b>  | 2,109,289  |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25) . . . . .  | <b>2</b>  | 1,379,649  |
| <b>3</b>  | Revenue less expenses Subtract line 2 from line 1 . . . . .   | <b>3</b>  | 729,640    |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . . . . .           | <b>4</b>  | 9,018,828  |
| <b>5</b>  | Net unrealized gains (losses) on investments . . . . .  | <b>5</b>  | 296,485    |
| <b>6</b>  | Donated services and use of facilities . . . . .  | <b>6</b>  |            |
| <b>7</b>  | Investment expenses . . . . .   | <b>7</b>  |            |
| <b>8</b>  | Prior period adjustments . . . . .  | <b>8</b>  |            |
| <b>9</b>  | Other changes in net assets or fund balances (explain in Schedule O) . . . . .                                | <b>9</b>  | 5          |
| <b>10</b> | Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | <b>10</b> | 10,044,958 |

**Part XII Financial Statements and Reporting**

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

|   |           | Yes | No |
|---|-----------|-----|----|
| <p><b>1</b> Accounting method used to prepare the Form 990 <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br/>                     If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O</p>   |           |     |    |
| <p><b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant?<br/>                     If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both<br/> <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis</p> | <b>2a</b> |     | No |
| <p><b>b</b> Were the organization's financial statements audited by an independent accountant?<br/>                     If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both<br/> <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis</p>                            | <b>2b</b> |     | No |
| <p><b>c</b> If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?<br/>                     If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O</p>   | <b>2c</b> |     |    |
| <p><b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?</p>   | <b>3a</b> |     |    |
| <p><b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits</p>  | <b>3b</b> |     |    |

## Additional Data

**Software ID:**

**Software Version:**

**EIN:** 42-1204613

**Name:** THE DANISH IMMIGRANT MUSEUM

Form 990 (2016)

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

THE MUSEUM OF DANISH AMERICA CELEBRATES DANISH ROOTS AND AMERICAN DREAMS THROUGH ITS CURATORIAL ACTIVITIES. THE CURATORIAL DEPARTMENT MAINTAINS A COLLECTION OF APPROXIMATELY 30,000 ARTIFACTS AND ACCEPTED 1,100 ADDITIONAL PIECES DURING THIS PAST YEAR. OVER 42,000 ARTIFACT RECORDS ARE MADE AVAILABLE THROUGH "VIEW OUR COLLECTION" ON THE MUSEUM'S WEBSITE. THE MUSEUM (1) WELCOMED OVER 8,000 VISITORS THIS YEAR, (2) OPENED THREE NEW TEMPORARY EXHIBITIONS AND RE-DESIGNED TWO CORE EXHIBITION GALLERIES, AND (3) PROVIDED EIGHT DIFFERENT TRAVELING EXHIBITIONS TO 13 VENUES IN 9 STATES REACHING AN ADDITIONAL AUDIENCE OF 20,000 PEOPLE. A ROBUST CALENDAR OF SPECIAL EVENTS PROVIDED LUNCHTIME SPEAKERS, HOLIDAY TRADITIONS, OUTDOOR ACTIVITIES, AND DANISH FILMS TO VISITORS OF ALL AGES.

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

THE GENEALOGY CENTER OF THE MUSEUM OF DANISH AMERICA, LOCATED ON MAIN STREET IN ELK HORN, COLLECTS PRINT, VISUAL, MICROFORM AND DIGITAL MATERIALS ON DANISH IMMIGRANTS AND DANISH AMERICANS, THEIR COMMUNITIES AND ORGANIZATIONS, AND PROVIDES INFORMATION ON RELEVANT GENEALOGICAL RESOURCES AS WELL AS RESEARCH AND TRANSLATION SERVICES TO NORTH AMERICAN AND DANISH PATRONS BOTH IN-HOUSE AND LONG DISTANCE. THE DEPARTMENT ALSO PROVIDES SUPPORT SERVICES FOR THE CURATORIAL AND EXHIBITIONS DEPARTMENTS. IN FY 2016/2017, MORE THAN 580 PEOPLE VISITED THE GENEALOGY CENTER, WHILE MANY OTHERS CONTACTED THE CENTER VIA PHONE, EMAIL, OR MAIL. OUTREACH ACTIVITIES INCLUDED NEWSPAPER VIGNETTES, ARTICLES WRITTEN FOR THE AMERICA LETTER, PRESENTATIONS, SOCIAL MEDIA, AND MEETINGS WITH OTHER DANISH- AMERICAN ARCHIVES AND ORGANIZATIONS. STAFF CONSISTS OF 1 FULL-TIME LIBRARIAN/MANAGER, A 6 FTE LIBRARY ASSISTANT, OCCASIONAL INTERNS AND OVER A DOZEN LOCAL AND LONG-DISTANCE VOLUNTEERS. IN FY 2016/2017, GENEALOGY STAFF AND VOLUNTEERS COMPLETED 35 TRANSLATION REQUESTS AND 57 IN-DEPTH RESEARCH PROJECTS, CREATED SEVERAL NEW IN-HOUSE INDEXES AND DATABASES, AND ADDED 120 IMMIGRANT FILES TO THE VERTICAL FILE COLLECTION AND UPDATED MANY MORE. WITH THE ASSISTANCE OF A DANISH ARCHIVING INTERN, OVER 500 ITEMS WERE CATALOGUED INTO THE GENEALOGY CENTER'S LIBRARY AND SPECIAL COLLECTIONS, FROM BOOKS AND REFERENCE MATERIALS TO UNIQUE FAMILY DOCUMENTS AND PHOTOGRAPHS.

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

PUBLIC OUTREACH ACTIVITIES BRING THE MUSEUM'S MISSION TO ITS NATIONAL AUDIENCE AND MEMBERSHIP. MUSEUM STAFF ENGAGE CONSTITUENTS AT PUBLIC FESTIVALS, LECTURES AND PRESENTATIONS, WORKSHOPS, AND RECEPTIONS ACROSS THE COUNTRY. DURING THE PAST FISCAL YEAR, OVER 20,000 PEOPLE PARTICIPATED IN 44 OFF-SITE MUSEUM EVENTS IN 13 STATES AND THE U.S. VIRGIN ISLANDS. THE MUSEUM ALSO ENGAGED AUDIENCE MEMBERS THROUGH INTERNET-BASED AND ELECTRONIC MEDIA. OVER 325,000 UNIQUE VISITORS CAME TO THE MUSEUM'S WEBSITE, 6,000 PEOPLE SUBSCRIBE TO THE MONTHLY E-NEWSLETTER, AND 8,400 PEOPLE FOLLOW THE MUSEUM'S FACEBOOK PAGE.

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**Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

| (A)<br>Name and Title                             | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---|--|---|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
|   |  | Individual trustee or director  | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| CINDY LARSEN ADAMS<br>.....<br>BOARD MEMBER       | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| RONALD BRO<br>.....<br>BOARD MEMBER               | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| BETH BRO-ROOF<br>.....<br>BOARD MEMBER            | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| TIMOTHY BURCHILL<br>.....<br>VICE PRESIDE         | 5 00<br>.....  | X   |                       | X       |              |                              |        | 0   | 0  | 0   |
| BENTE ELLIS<br>.....<br>BOARD MEMBER              | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| DAVID ESBECK<br>.....<br>BOARD MEMBER             | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| DOROTHY STADSVOLD FEISEL<br>.....<br>BOARD MEMBER | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| DAVID HENDEE<br>.....<br>BOARD MEMBER             | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| GLENN HENRIKSEN<br>.....<br>BOARD MEMBER          | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| ANNA THOMSEN HOLLIDAY<br>.....<br>BOARD MEMBER    | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |

| Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors |  |   |                       |         |              |                              |        |   |  |   |
|---|--|---|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
| (A)<br>Name and Title   | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|   |  | Individual trustee or director  | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| MARNIE JENSEN<br>.....<br>BOARD MEMBER  | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| GAREY KNUDSEN<br>.....<br>PRESIDENT   | 5 00<br>.....  | X   |                       | X       |              |                              |        | 0   | 0  | 0   |
| MERLYN KNUDSEN<br>.....<br>BOARD MEMBER   | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| CAROLYN LARSON<br>.....<br>SECRETARY  | 5 00<br>.....  | X   |                       | X       |              |                              |        | 0   | 0  | 0   |
| CRAIG MOLGAARD<br>.....<br>BOARD MEMBER   | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| DAGMAR MUTHAMIA<br>.....<br>BOARD MEMBER  | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| KAREN NIELSEN<br>.....<br>BOARD MEMBER  | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| RANDY RUGGAARD<br>.....<br>BOARD MEMBER   | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| ANDERS SAND<br>.....<br>BOARD MEMBER  | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| JERRY SCHRADER<br>.....<br>BOARD MEMBER   | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |

**Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

| (A)<br>Name and Title                      | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|--|--|---|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
|  |  | Individual trustee or director  | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| OLE SONNICHSEN<br>.....<br>BOARD MEMBER    | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| CARL STEFFENSEN<br>.....<br>BOARD MEMBER   | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| LINDA STEFFENSEN<br>.....<br>BOARD MEMBER  | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| KAREN SUCHOMEL<br>.....<br>TREASURER       | 5 00<br>.....  | X   |                       | X       |              |                              |        | 0   | 0  | 0   |
| CARL SVENDSEN<br>.....<br>BOARD MEMBER     | 1 00<br>.....  | X   |                       |         |              |                              |        | 0   | 0  | 0   |
| RASMUS THOEGERSEN<br>.....<br>EXEC DIR     | 40 00<br>.....   |   |                       | X       |              |                              |        | 51,000  | 0  | 0   |
| JOHN MARK NIELSEN<br>.....<br>FMR EXEC DIR | 40 00<br>.....   |   |                       |         |              |                              | X      | 38,958  | 0  | 0   |

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

**Public Charity Status and Public Support**

OMB No 1545-0047

**2016**

**Open to Public Inspection**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Department of the Treasury  
Internal Revenue Service

Name of the organization  
THE DANISH IMMIGRANT MUSEUM

Employer identification number

42-1204613

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ))
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II)
- 8  A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture See instructions Enter the name, city, and state of the college or university \_\_\_\_\_
- 10  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2)**. (Complete Part III)
- 11  An organization organized and operated exclusively to test for public safety See **section 509(a)(4)**.
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization
  - f Enter the number of supported organizations \_\_\_\_\_
  - g Provide the following information about the supported organization(s) \_\_\_\_\_

| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1- 10 above (see instructions)) | (iv) Is the organization listed in your governing document? |    | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|------------------------------------|----------|--|---|----|---|---|
|                                    |          |  | Yes   | No |   |   |
|                                    |          |  |   |    |   |   |
| <b>Total</b>                       |          |  |   |    |   |   |

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

(Complete only if you checked the box on line 5, 7, 8, or 9 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

| Calendar year<br>(or fiscal year beginning in) ▶ |   | (a)2012 | (b)2013 | (c)2014 | (d)2015 | (e)2016 | (f)Total |
|--|---|---------|---------|---------|---------|---------|----------|
| <b>1</b>   | Gifts, grants, contributions, and membership fees received (Do not include any "unusual grant.")  |         |         |         |         |         |          |
| <b>2</b>   | Tax revenues levied for the organization's benefit and either paid to or expended on its behalf   |         |         |         |         |         |          |
| <b>3</b>   | The value of services or facilities furnished by a governmental unit to the organization without charge   |         |         |         |         |         |          |
| <b>4</b>   | <b>Total.</b> Add lines 1 through 3   |         |         |         |         |         |          |
| <b>5</b>   | The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) |         |         |         |         |         |          |
| <b>6</b>   | <b>Public support.</b> Subtract line 5 from line 4  |         |         |         |         |         |          |

**Section B. Total Support**

| Calendar year<br>(or fiscal year beginning in) ▶ |  | (a)2012 | (b)2013 | (c)2014 | (d)2015 | (e)2016   | (f)Total |
|--|--|---------|---------|---------|---------|-----------|----------|
| <b>7</b>   | Amounts from line 4  |         |         |         |         |           |          |
| <b>8</b>   | Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources   |         |         |         |         |           |          |
| <b>9</b>   | Net income from unrelated business activities, whether or not the business is regularly carried on   |         |         |         |         |           |          |
| <b>10</b>  | Other income (Do not include gain or loss from the sale of capital assets (Explain in Part VI))  |         |         |         |         |           |          |
| <b>11</b>  | <b>Total support.</b> Add lines 7 through 10   |         |         |         |         |           |          |
| <b>12</b>  | Gross receipts from related activities, etc. (see instructions)  |         |         |         |         | <b>12</b> |          |
| <b>13</b>  | <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 <b>stop here</b> . . . . . ▶ <input type="checkbox"/> |         |         |         |         |           |          |

**Section C. Computation of Public Support Percentage**

|            |   |           |  |
|------------|---|-----------|--|
| <b>14</b>  | Public support percentage for 2016 (line 6, column (f) divided by line 11, column (f))  | <b>14</b> |  |
| <b>15</b>  | Public support percentage for 2015 Schedule A, Part II, line 14   | <b>15</b> |  |
| <b>16a</b> | <b>33 1/3% support test—2016.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>   |           |  |
| <b>b</b>   | <b>33 1/3% support test—2015.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>  |           |  |
| <b>17a</b> | <b>10%-facts-and-circumstances test—2016.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>      |           |  |
| <b>b</b>   | <b>10%-facts-and-circumstances test—2015.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/> |           |  |
| <b>18</b>  | <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 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year<br>(or fiscal year beginning in) ▶  | (a)2012   | (b)2013   | (c)2014   | (d)2015   | (e)2016   | (f)Total   |
|---|-----------|-----------|-----------|-----------|-----------|------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")  | 2,494,490 | 1,693,380 | 2,161,861 | 1,196,005 | 1,899,784 | 9,445,520  |
| <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 | 170,802   | 167,785   | 164,242   | 152,336   | 149,502   | 804,667    |
| <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 through 5   | 2,665,292 | 1,861,165 | 2,326,103 | 1,348,341 | 2,049,286 | 10,250,187 |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons  |           |           |           |           |           |            |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year           | 745,374   | 955,103   | 1,355,104 | 609,857   | 1,290,367 | 4,955,805  |
| <b>c</b> Add lines 7a and 7b  | 745,374   | 955,103   | 1,355,104 | 609,857   | 1,290,367 | 4,955,805  |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)  |           |           |           |           |           | 5,294,382  |

**Section B. Total Support**

| Calendar year<br>(or fiscal year beginning in) ▶  | (a)2012   | (b)2013   | (c)2014   | (d)2015   | (e)2016   | (f)Total   |
|---|-----------|-----------|-----------|-----------|-----------|------------|
| <b>9</b> Amounts from line 6  | 2,665,292 | 1,861,165 | 2,326,103 | 1,348,341 | 2,049,286 | 10,250,187 |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources   | 66,595    | 55,528    | 61,905    | 70,552    | 76,288    | 330,868    |
| <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  | 66,595    | 55,528    | 61,905    | 70,552    | 76,288    | 330,868    |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on   |           |           | 1,362     |           |           | 1,362      |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)   |           |           |           |           |           |            |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)  | 2,731,887 | 1,916,693 | 2,389,370 | 1,418,893 | 2,125,574 | 10,582,417 |
| <b>14 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 <b>stop here</b> ▶ <input type="checkbox"/> |           |           |           |           |           |            |

**Section C. Computation of Public Support Percentage**

|  |           |          |
|--|-----------|----------|
| <b>15</b> Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f)) | <b>15</b> | 50.030 % |
| <b>16</b> Public support percentage from 2015 Schedule A, Part III, line 15                      | <b>16</b> | 53.150 % |

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

|  |           |         |
|--|-----------|---------|
| <b>17</b> Investment income percentage for <b>2016</b> (line 10c, column (f) divided by line 13, column (f)) | <b>17</b> | 3.000 % |
| <b>18</b> Investment income percentage from <b>2015</b> Schedule A, Part III, line 17                        | <b>18</b> | 3.000 % |

**19a 33 1/3% support tests—2016.** 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—2015.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶

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



**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

|            |   | Yes | No |
|------------|---|-----|----|
| <b>1</b>   | Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.  |     |    |
|            | <b>1</b>  |     |    |
| <b>2</b>   | Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).   |     |    |
|            | <b>2</b>  |     |    |
| <b>3a</b>  | Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.   |     |    |
|            | <b>3a</b>   |     |    |
| <b>b</b>   | Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.   |     |    |
|            | <b>3b</b>   |     |    |
| <b>c</b>   | Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.  |     |    |
|            | <b>3c</b>   |     |    |
| <b>4a</b>  | Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 12a or 12b in Part I, answer (b) and (c) below.   |     |    |
|            | <b>4a</b>   |     |    |
| <b>b</b>   | Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.  |     |    |
|            | <b>4b</b>   |     |    |
| <b>c</b>   | Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.   |     |    |
|            | <b>4c</b>   |     |    |
| <b>5a</b>  | Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document). |     |    |
|            | <b>5a</b>   |     |    |
| <b>b</b>   | <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?  |     |    |
|            | <b>5b</b>   |     |    |
| <b>c</b>   | <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?   |     |    |
|            | <b>5c</b>   |     |    |
| <b>6</b>   | Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .   |     |    |
|            | <b>6</b>  |     |    |
| <b>7</b>   | Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).  |     |    |
|            | <b>7</b>  |     |    |
| <b>8</b>   | Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).   |     |    |
|            | <b>8</b>  |     |    |
| <b>9a</b>  | Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .  |     |    |
|            | <b>9a</b>   |     |    |
| <b>b</b>   | Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .   |     |    |
|            | <b>9b</b>   |     |    |
| <b>c</b>   | Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .  |     |    |
|            | <b>9c</b>   |     |    |
| <b>10a</b> | Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.   |     |    |
|            | <b>10a</b>  |     |    |
| <b>b</b>   | Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)  |     |    |
|            | <b>10b</b>  |     |    |

**Part IV Supporting Organizations** (continued)

|           |   | Yes | No |
|-----------|---|-----|----|
| <b>11</b> | Has the organization accepted a gift or contribution from any of the following persons?   |     |    |
| <b>a</b>  | A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization? |     |    |
| <b>b</b>  | A family member of a person described in (a) above?   |     |    |
| <b>c</b>  | A 35% controlled entity of a person described in (a) or (b) above? <i>If "Yes" to a, b, or c, provide detail in Part VI</i>   |     |    |

**Section B. Type I Supporting Organizations**

|          |  | Yes | No |
|----------|--|-----|----|
| <b>1</b> | Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i> |     |    |
| <b>2</b> | Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.</i>  |     |    |

**Section C. Type II Supporting Organizations**

|          |   | Yes | No |
|----------|---|-----|----|
| <b>1</b> | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i> |     |    |

**Section D. All Type III Supporting Organizations**

|          |  | Yes | No |
|----------|--|-----|----|
| <b>1</b> | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? |     |    |
| <b>2</b> | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization (s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>  |     |    |
| <b>3</b> | By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>  |     |    |

**Section E. Type III Functionally-Integrated Supporting Organizations**

|          |  |  |  |
|----------|--|--|--|
| <b>1</b> | Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)   |  |  |
| <b>a</b> | <input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.   |  |  |
| <b>b</b> | <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.  |  |  |
| <b>c</b> | <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a government entity (see instructions).  |  |  |
| <b>2</b> | Activities Test <b>Answer (a) and (b) below.</b>   |  |  |
| <b>a</b> | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i> |  |  |
| <b>b</b> | Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>  |  |  |
| <b>3</b> | Parent of Supported Organizations <b>Answer (a) and (b) below.</b>   |  |  |
| <b>a</b> | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>Provide details in Part VI.</i>  |  |  |
| <b>b</b> | Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>  |  |  |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970. **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

**Section A - Adjusted Net Income**

|   | (A) Prior Year | (B) Current Year<br>(optional) |
|---|----------------|--------------------------------|
| <b>1</b> Net short-term capital gain  | <b>1</b>       |                                |
| <b>2</b> Recoveries of prior-year distributions   | <b>2</b>       |                                |
| <b>3</b> Other gross income (see instructions)  | <b>3</b>       |                                |
| <b>4</b> Add lines 1 through 3  | <b>4</b>       |                                |
| <b>5</b> Depreciation and depletion   | <b>5</b>       |                                |
| <b>6</b> Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | <b>6</b>       |                                |
| <b>7</b> Other expenses (see instructions)  | <b>7</b>       |                                |
| <b>8 Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)  | <b>8</b>       |                                |

**Section B - Minimum Asset Amount**

|   | (A) Prior Year | (B) Current Year<br>(optional) |
|---|----------------|--------------------------------|
| <b>1</b> Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year) | <b>1</b>       |                                |
| <b>a</b> Average monthly value of securities  | <b>1a</b>      |                                |
| <b>b</b> Average monthly cash balances  | <b>1b</b>      |                                |
| <b>c</b> Fair market value of other non-exempt-use assets   | <b>1c</b>      |                                |
| <b>d Total</b> (add lines 1a, 1b, and 1c)   | <b>1d</b>      |                                |
| <b>e Discount</b> claimed for blockage or other factors (explain in detail in Part VI)  |                |                                |
| <b>2</b> Acquisition indebtedness applicable to non-exempt use assets   | <b>2</b>       |                                |
| <b>3</b> Subtract line 2 from line 1d   | <b>3</b>       |                                |
| <b>4</b> Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)                                 | <b>4</b>       |                                |
| <b>5</b> Net value of non-exempt-use assets (subtract line 4 from line 3)   | <b>5</b>       |                                |
| <b>6</b> Multiply line 5 by .035  | <b>6</b>       |                                |
| <b>7</b> Recoveries of prior-year distributions   | <b>7</b>       |                                |
| <b>8 Minimum Asset Amount</b> (add line 7 to line 6)  | <b>8</b>       |                                |

**Section C - Distributable Amount**

|  |          | Current Year |
|--|----------|--------------|
| <b>1</b> Adjusted net income for prior year (from Section A, line 8, Column A)   | <b>1</b> |              |
| <b>2</b> Enter 85% of line 1   | <b>2</b> |              |
| <b>3</b> Minimum asset amount for prior year (from Section B, line 8, Column A)  | <b>3</b> |              |
| <b>4</b> Enter greater of line 2 or line 3   | <b>4</b> |              |
| <b>5</b> Income tax imposed in prior year  | <b>5</b> |              |
| <b>6 Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)   | <b>6</b> |              |
| <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions) |          |              |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**

| <b>Section D - Distributions</b>  | <b>Current Year</b> |
|---|---------------------|
| <b>1</b> Amounts paid to supported organizations to accomplish exempt purposes  |                     |
| <b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity    |                     |
| <b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations  |                     |
| <b>4</b> Amounts paid to acquire exempt-use assets  |                     |
| <b>5</b> Qualified set-aside amounts (prior IRS approval required)  |                     |
| <b>6</b> Other distributions (describe in Part VI) See instructions   |                     |
| <b>7 Total annual distributions.</b> Add lines 1 through 6  |                     |
| <b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions |                     |
| <b>9</b> Distributable amount for 2016 from Section C, line 6   |                     |
| <b>10</b> Line 8 amount divided by Line 9 amount  |                     |

| <b>Section E - Distribution Allocations (see instructions)</b>   | <b>(i)<br/>Excess Distributions</b> | <b>(ii)<br/>Underdistributions<br/>Pre-2016</b> | <b>(iii)<br/>Distributable<br/>Amount for 2016</b> |
|--|-------------------------------------|---|--|
| <b>1</b> Distributable amount for 2016 from Section C, line 6  |                                     |   |  |
| <b>2</b> Underdistributions, if any, for years prior to 2016 (reasonable cause required--see instructions)   |                                     |   |  |
| <b>3</b> Excess distributions carryover, if any, to 2016   |                                     |   |  |
| <b>a</b>   |                                     |   |  |
| <b>b</b>   |                                     |   |  |
| <b>c</b> From 2013. . . . .  |                                     |   |  |
| <b>d</b> From 2014. . . . .  |                                     |   |  |
| <b>e</b> From 2015. . . . .  |                                     |   |  |
| <b>f Total</b> of lines 3a through e   |                                     |   |  |
| <b>g</b> Applied to underdistributions of prior years  |                                     |   |  |
| <b>h</b> Applied to 2016 distributable amount  |                                     |   |  |
| <b>i</b> Carryover from 2011 not applied (see instructions)  |                                     |   |  |
| <b>j</b> Remainder Subtract lines 3g, 3h, and 3i from 3f   |                                     |   |  |
| <b>4</b> Distributions for 2016 from Section D, line 7   |                                     |   |  |
| <b>a</b> Applied to underdistributions of prior years  |                                     |   |  |
| <b>b</b> Applied to 2016 distributable amount  |                                     |   |  |
| <b>c</b> Remainder Subtract lines 4a and 4b from 4   |                                     |   |  |
| <b>5</b> Remaining underdistributions for years prior to 2016, if any Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions) |                                     |   |  |
| <b>6</b> Remaining underdistributions for 2016 Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)                        |                                     |   |  |
| <b>7 Excess distributions carryover to 2017.</b> Add lines 3j and 4c   |                                     |   |  |
| <b>8</b> Breakdown of line 7   |                                     |   |  |
| <b>a</b>   |                                     |   |  |
| <b>b</b> Excess from 2013. . . . .   |                                     |   |  |
| <b>c</b> Excess from 2014. . . . .   |                                     |   |  |
| <b>d</b> Excess from 2015. . . . .   |                                     |   |  |
| <b>e</b> Excess from 2016. . . . .   |                                     |   |  |

**Part VI Supplemental Information.**

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

**Facts And Circumstances Test**

**SCHEDULE D**  
(Form 990)

**Supplemental Financial Statements**

OMB No 1545-0047

**2016**

**Open to Public Inspection**

▶ Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
▶ Attach to Form 990.

Information about Schedule D (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Department of the Treasury  
Internal Revenue Service

**Name of the organization**  
THE DANISH IMMIGRANT MUSEUM

**Employer identification number**  
42-1204613

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

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

|  | (a) Donor advised funds | (b) Funds and other accounts |
|--|-------------------------|------------------------------|
| <b>1</b> Total number at end of year                       |                         |                              |
| <b>2</b> Aggregate value of contributions to (during year) |                         |                              |
| <b>3</b> Aggregate value of grants from (during year)      |                         |                              |
| <b>4</b> Aggregate value at end of year                    |                         |                              |

**5** Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?  Yes  No

**6** Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?  Yes  No

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

**1** Purpose(s) of conservation easements held by the organization (check all that apply)

Preservation of land for public use (e.g., recreation or education)  Preservation of an historically important land area

Protection of natural habitat  Preservation of a certified historic structure

Preservation of open space

**2** Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

|   | Held at the End of the Year |
|---|-----------------------------|
| <b>a</b> Total number of conservation easements   | <b>2a</b>                   |
| <b>b</b> Total acreage restricted by conservation easements   | <b>2b</b>                   |
| <b>c</b> Number of conservation easements on a certified historic structure included in (a)   | <b>2c</b>                   |
| <b>d</b> Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register | <b>2d</b>                   |

**3** Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

**4** Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

**5** Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?  Yes  No

**6** Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \_\_\_\_\_

**7** Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

**8** Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?  Yes  No

**9** In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

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

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

**1a** If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

**b** If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenue included on Form 990, Part VIII, line 1 ▶ \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X ▶ \$ \_\_\_\_\_

**2** If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

**a** Revenue included on Form 990, Part VIII, line 1 ▶ \$ \_\_\_\_\_

**b** Assets included in Form 990, Part X ▶ \$ \_\_\_\_\_

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

- 3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)
- a**  Public exhibition
  - b**  Scholarly research
  - c**  Preservation for future generations
  - d**  Loan or exchange programs
  - e**  Other
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII
- 5** During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b** If "Yes," explain the arrangement in Part XIII and complete the following table
- |  | Amount |
|--|--------|
| <b>c</b> Beginning balance             |        |
| <b>d</b> Additions during the year     |        |
| <b>e</b> Distributions during the year |        |
| <b>f</b> Ending balance                |        |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b** If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

|   | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|---|------------------|----------------|--------------------|----------------------|---------------------|
| <b>1a</b> Beginning of year balance . . . . .                     | 4,004,970        | 3,687,329      | 3,146,431          | 2,645,830            | 2,350,003           |
| <b>b</b> Contributions . . . . .                                  | 922,594          | 188,705        | 802,709            | 424,269              | 302,048             |
| <b>c</b> Net investment earnings, gains, and losses               | 437,557          | 227,844        | -32,521            | 411,506              | 196,583             |
| <b>d</b> Grants or scholarships . . . . .                         |                  |                |                    |                      |                     |
| <b>e</b> Other expenditures for facilities and programs . . . . . | -412,611         | -66,127        | -198,907           | -308,827             | -180,383            |
| <b>f</b> Administrative expenses . . . . .                        | -37,228          | -32,781        | -30,383            | -26,347              | -22,421             |
| <b>g</b> End of year balance . . . . .                            | 4,915,282        | 4,004,970      | 3,687,329          | 3,146,431            | 2,645,830           |

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as
- a** Board designated or quasi-endowment ▶ 22 160 %
  - b** Permanent endowment ▶ 77 840 %
  - c** Temporarily restricted endowment ▶
- The percentages on lines 2a, 2b, and 2c should equal 100%
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by
- |  | Yes           | No |
|--|---------------|----|
| <b>(i)</b> unrelated organizations . . . . .   | <b>3a(i)</b>  | No |
| <b>(ii)</b> related organizations . . . . .  | <b>3a(ii)</b> | No |
| <b>b</b> If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . . | <b>3b</b>     |    |
- 4** Describe in Part XIII the intended uses of the organization's endowment funds

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property   | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---|--------------------------------------|---------------------------------|------------------------------|----------------|
| <b>1a</b> Land . . . . .  |                                      | 272,850                         |                              | 272,850        |
| <b>b</b> Buildings  |                                      | 5,299,757                       | 1,688,804                    | 3,610,953      |
| <b>c</b> Leasehold improvements   |                                      | 26,901                          | 25,556                       | 1,345          |
| <b>d</b> Equipment . . . . .  |                                      | 522,393                         | 329,699                      | 192,694        |
| <b>e</b> Other . . . . .  |                                      | 814,669                         | 300,030                      | 514,639        |
| <b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c) ) . . . ▶ |                                      |                                 |                              | 4,592,481      |

**Part VII Investments—Other Securities.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

| (a) Description of security or category<br>(including name of security)  | (b) Book value | (c) Method of valuation<br>Cost or end-of-year market value |
|--|----------------|---|
| (1) Financial derivatives . . . . .                                      |                |   |
| (2) Closely-held equity interests . . . . .                              |                |   |
| (3) Other _____  |                |   |
| (A)  |                |   |
| (B)  |                |   |
| (C)  |                |   |
| (D)  |                |   |
| (E)  |                |   |
| (F)  |                |   |
| (G)  |                |   |
| (H)  |                |   |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 12 ) |                |   |

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

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

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

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

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

| (a) Description of liability   | (b) Book value |
|--|----------------|
| 1. (1) Federal income taxes  |                |
| (2)  |                |
| (3)  |                |
| (4)  |                |
| (5)  |                |
| (6)  |                |
| (7)  |                |
| (8)  |                |
| (9)  |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 25 ) |                |

**2.** Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII



**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

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

|          |  |           |           |           |
|----------|--|-----------|-----------|-----------|
| <b>1</b> | Total revenue, gains, and other support per audited financial statements . . . . .                     |           | <b>1</b>  | 2,419,140 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part VIII, line 12                                     |           |           |           |
| <b>a</b> | Net unrealized gains (losses) on investments . . . . .   | <b>2a</b> | 296,485   |           |
| <b>b</b> | Donated services and use of facilities . . . . .   | <b>2b</b> | 13,366    |           |
| <b>c</b> | Recoveries of prior year grants . . . . .  | <b>2c</b> |           |           |
| <b>d</b> | Other (Describe in Part XIII) . . . . .  | <b>2d</b> |           |           |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .  |           | <b>2e</b> | 309,851   |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .   |           | <b>3</b>  | 2,109,289 |
| <b>4</b> | Amounts included on Form 990, Part VIII, line 12, but not on line <b>1</b>                             |           |           |           |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                             | <b>4a</b> |           |           |
| <b>b</b> | Other (Describe in Part XIII) . . . . .  | <b>4b</b> |           |           |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .  |           | <b>4c</b> |           |
| <b>5</b> | Total revenue Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12) . . . . . |           | <b>5</b>  | 2,109,289 |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

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

|          |   |           |           |           |
|----------|---|-----------|-----------|-----------|
| <b>1</b> | Total expenses and losses per audited financial statements . . . . .                                    |           | <b>1</b>  | 1,393,010 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part IX, line 25  |           |           |           |
| <b>a</b> | Donated services and use of facilities . . . . .  | <b>2a</b> | 13,366    |           |
| <b>b</b> | Prior year adjustments . . . . .  | <b>2b</b> |           |           |
| <b>c</b> | Other losses . . . . .  | <b>2c</b> |           |           |
| <b>d</b> | Other (Describe in Part XIII) . . . . .   | <b>2d</b> |           |           |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .   |           | <b>2e</b> | 13,366    |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .  |           | <b>3</b>  | 1,379,644 |
| <b>4</b> | Amounts included on Form 990, Part IX, line 25, but not on line <b>1</b> :                              |           |           |           |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                              | <b>4a</b> |           |           |
| <b>b</b> | Other (Describe in Part XIII) . . . . .   | <b>4b</b> | 5         |           |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .   |           | <b>4c</b> | 5         |
| <b>5</b> | Total expenses Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18) . . . . . |           | <b>5</b>  | 1,379,649 |

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b Also complete this part to provide any additional information

| Return Reference          | Explanation |
|---------------------------|-------------|
| See Additional Data Table |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |
|                           |             |

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

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

## Additional Data

**Software ID:**

**Software Version:**

**EIN:** 42-1204613

**Name:** THE DANISH IMMIGRANT MUSEUM

## Supplemental Information

| Return Reference                      | Explanation   |
|---------------------------------------|---|
| SCHEDULE D, PAGE 2, PART V,<br>LINE 4 | THE TWO ENDOWMENT FUNDS MAINTAINED BY THE MUSEUM ARE INTENDED TO PROVIDE A STEADY STREAM OF INCOME COMING FROM THE ALLOWABLE WITHDRAWALS OF INCOME WHILE MAINTAINING THE PURCHASING POWER OF THE UNDERLYING INVESTMENT ASSETS IN ORDER TO MAINTAIN THE FUNDING FOR PERPETUITY |

## Supplemental Information

| Return Reference                         | Explanation                          |
|--|--------------------------------------|
| SCHEDULE D, PAGE 4, PART XII,<br>LINE 4B | BOOK / TAX DEPRECIATION DIFFERENCE 5 |

**Schedule J**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

OMB No 1545-0047

**For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**  
 ▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**  
 ▶ **Attach to Form 990.**

**2015**  
**Open to Public Inspection**

▶ **Information about Schedule J (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**

|   |  |
|---|--|
| Name of the organization<br>THE DANISH IMMIGRANT MUSEUM | Employer identification number<br>42-1204613 |
|---|--|

**Part I Questions Regarding Compensation**

|  | Yes  | No   |  |  |   |  |   |  |  |  |
|--|--|--|--|--|---|--|---|--|--|--|
| <p><b>1a</b> Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.</p> <table border="0"> <tr> <td><input type="checkbox"/> First-class or charter travel</td> <td><input type="checkbox"/> Housing allowance or residence for personal use</td> </tr> <tr> <td><input type="checkbox"/> Travel for companions</td> <td><input type="checkbox"/> Payments for business use of personal residence</td> </tr> <tr> <td><input type="checkbox"/> Tax idemnification and gross-up payments</td> <td><input type="checkbox"/> Health or social club dues or initiation fees</td> </tr> <tr> <td><input type="checkbox"/> Discretionary spending account</td> <td><input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)</td> </tr> </table> | <input type="checkbox"/> First-class or charter travel                   | <input type="checkbox"/> Housing allowance or residence for personal use | <input type="checkbox"/> Travel for companions               | <input type="checkbox"/> Payments for business use of personal residence | <input type="checkbox"/> Tax idemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   | <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |  |  |
| <input type="checkbox"/> First-class or charter travel   | <input type="checkbox"/> Housing allowance or residence for personal use |  |  |  |   |  |   |  |  |  |
| <input type="checkbox"/> Travel for companions   | <input type="checkbox"/> Payments for business use of personal residence |  |  |  |   |  |   |  |  |  |
| <input type="checkbox"/> Tax idemnification and gross-up payments  | <input type="checkbox"/> Health or social club dues or initiation fees   |  |  |  |   |  |   |  |  |  |
| <input type="checkbox"/> Discretionary spending account  | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |  |  |  |   |  |   |  |  |  |
| <p><b>b</b> If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.</p>  | <b>1b</b>  |  |  |  |   |  |   |  |  |  |
| <p><b>2</b> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?</p>   | <b>2</b>   |  |  |  |   |  |   |  |  |  |
| <p><b>3</b> Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.</p> <table border="0"> <tr> <td><input type="checkbox"/> Compensation committee</td> <td><input type="checkbox"/> Written employment contract</td> </tr> <tr> <td><input type="checkbox"/> Independent compensation consultant</td> <td><input type="checkbox"/> Compensation survey or study</td> </tr> <tr> <td><input type="checkbox"/> Form 990 of other organizations</td> <td><input type="checkbox"/> Approval by the board or compensation committee</td> </tr> </table>   | <input type="checkbox"/> Compensation committee                          | <input type="checkbox"/> Written employment contract                     | <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                    | <input type="checkbox"/> Form 990 of other organizations          | <input type="checkbox"/> Approval by the board or compensation committee |   |  |  |  |
| <input type="checkbox"/> Compensation committee  | <input type="checkbox"/> Written employment contract                     |  |  |  |   |  |   |  |  |  |
| <input type="checkbox"/> Independent compensation consultant   | <input type="checkbox"/> Compensation survey or study                    |  |  |  |   |  |   |  |  |  |
| <input type="checkbox"/> Form 990 of other organizations   | <input type="checkbox"/> Approval by the board or compensation committee |  |  |  |   |  |   |  |  |  |
| <p><b>4</b> During the year, did any person listed on Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization:</p>  |  |  |  |  |   |  |   |  |  |  |
| <p><b>a</b> Receive a severance payment or change-of-control payment?</p>  | <b>4a</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>b</b> Participate in, or receive payment from, a supplemental nonqualified retirement plan?</p>  | <b>4b</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>c</b> Participate in, or receive payment from, an equity-based compensation arrangement?<br/>If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.</p>   | <b>4c</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.</b></p>   |  |  |  |  |   |  |   |  |  |  |
| <p><b>5</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:</p>   |  |  |  |  |   |  |   |  |  |  |
| <p><b>a</b> The organization?</p>  | <b>5a</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>b</b> Any related organization?<br/>If "Yes," on line 5a or 5b, describe in Part III.</p>  | <b>5b</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>6</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:</p>   |  |  |  |  |   |  |   |  |  |  |
| <p><b>a</b> The organization?</p>  | <b>6a</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>b</b> Any related organization?<br/>If "Yes," on line 6a or 6b, describe in Part III.</p>  | <b>6b</b>  | No   |  |  |   |  |   |  |  |  |
| <p><b>7</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III.</p>  | <b>7</b>   | No   |  |  |   |  |   |  |  |  |
| <p><b>8</b> Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.</p>   | <b>8</b>   | No   |  |  |   |  |   |  |  |  |
| <p><b>9</b> If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?</p>   | <b>9</b>   |  |  |  |   |  |   |  |  |  |

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

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

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

| (A) Name and Title                  |      | (B) Breakdown of W-2 and/or 1099-MISC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|-------------------------------------|------|--|-------------------------------------|-------------------------------------|--|-------------------------|---------------------------------|---|
|                                     |      | (i) Base compensation                              | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |  |                         |                                 |   |
| 1 JOHN MARK NIELSEN<br>FMR EXEC DIR | (i)  | 38,958<br>-----                                    | -----                               | -----                               | -----  | -----                   | 38,958<br>-----                 | -----   |
|                                     | (ii) |  |                                     |                                     |  |                         |                                 |   |

**Part III** **Supplemental Information**

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

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

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No 1545-0047  
**2016**  
**Open to Public Inspection**

▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**  
▶ **Attach to Form 990.**  
▶ **Information about Schedule M (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990)**

Department of the Treasury  
Internal Revenue Service

Name of the organization  
THE DANISH IMMIGRANT MUSEUM

Employer identification number  
42-1204613

**Part I Types of Property**

|  | (a)<br>Check if applicable | (b)<br>Number of contributions or items contributed | (c)<br>Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d)<br>Method of determining noncash contribution amounts |
|--|----------------------------|---|--|---|
| 1 Art—Works of art . . . . .   |                            |   |  |   |
| 2 Art—Historical treasures . . . . .                                 |                            |   |  |   |
| 3 Art—Fractional interests . . . . .                                 |                            |   |  |   |
| 4 Books and publications . . . . .                                   |                            |   |  |   |
| 5 Clothing and household goods . . . . .                             |                            |   |  |   |
| 6 Cars and other vehicles . . . . .                                  |                            |   |  |   |
| 7 Boats and planes . . . . .   |                            |   |  |   |
| 8 Intellectual property . . . . .                                    |                            |   |  |   |
| 9 Securities—Publicly traded . . . . .                               | X                          | 1   | 2,017  | QUOTED MARKET PRICE                                       |
| 10 Securities—Closely held stock . . . . .                           |                            |   |  |   |
| 11 Securities—Partnership, LLC, or trust interests . . . . .         |                            |   |  |   |
| 12 Securities—Miscellaneous . . . . .                                |                            |   |  |   |
| 13 Qualified conservation contribution—Historic structures . . . . . |                            |   |  |   |
| 14 Qualified conservation contribution—Other . . . . .               |                            |   |  |   |
| 15 Real estate—Residential . . . . .                                 |                            |   |  |   |
| 16 Real estate—Commercial . . . . .                                  |                            |   |  |   |
| 17 Real estate—Other . . . . .                                       |                            |   |  |   |
| 18 Collectibles . . . . .  |                            |   |  |   |
| 19 Food inventory . . . . .  |                            |   |  |   |
| 20 Drugs and medical supplies . . . . .                              |                            |   |  |   |
| 21 Taxidermy . . . . .   |                            |   |  |   |
| 22 Historical artifacts . . . . .                                    |                            |   |  |   |
| 23 Scientific specimens . . . . .                                    |                            |   |  |   |
| 24 Archeological artifacts . . . . .                                 |                            |   |  |   |
| 25 Other ▶ ( _____ )   |                            |   |  |   |
| 26 Other ▶ ( _____ )   |                            |   |  |   |
| 27 Other ▶ ( _____ )   |                            |   |  |   |
| 28 Other ▶ ( _____ )   |                            |   |  |   |

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period? . . . . .

b If "Yes," describe the arrangement in Part II

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? . . . . .

b If "Yes," describe in Part II

33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II

|     | Yes | No |
|-----|-----|----|
| 30a |     | No |
| 31  | Yes |    |
| 32a | Yes |    |
|     |     |    |



**Part II Supplemental Information.**

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

| Return Reference                     | Explanation   |
|--------------------------------------|---|
| SCHEDULE M, PAGE 1, PART I, LINE 32B | WHEN A DONOR APPROACHES THE ORGANIZATION REGARDING A DONATION OF SECURITIES, THE DONOR IS PROVIDED WITH THE MUSEUM'S SECURITIES ACCOUNT INFORMATION TO MAKE THE TRANSFER ONCE RECEIVED, THE SECURITIES BROKER SELLS THE SECURITIES WHEN DIRECTED BY THE MUSEUM'S MANAGEMENT |

**SCHEDULE O**  
(Form 990 or 990-EZ)Department of the Treasury  
Internal Revenue ServiceName of the organization  
THE DANISH IMMIGRANT MUSEUM**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2016****Open to Public Inspection**

Employer identification number

42-1204613

**990 Schedule O, Supplemental Information**

| Return Reference                          | Explanation  |
|---|--|
| FORM 990,<br>PAGE 1,<br>PART I, LINE<br>6 | THE ORGANIZATION RECEIVES A SIGNIFICANT AMOUNT OF SUPPORT IN THE FORM OF GOODS AND SERVICES FROM DONORS AND VOLUNTEERS IN THE ORGANIZATION'S OPERATIONS, FUND RAISING, ADMISSIONS DE SK, MUSEUM SHOP, AND MUSEUM TOURS |

**990 Schedule O, Supplemental Information**

| <b>Return Reference</b>                      | <b>Explanation</b>  |
|--|---|
| FORM 990,<br>PAGE 2,<br>PART III,<br>LINE 4B | AMERICAN ARCHIVES AND ORGANIZATIONS STAFF CONSISTS OF 1 FULL-TIME LIBRARIAN/MANAGER, A 6 FTE LIBRARY ASSISTANT, OCCASIONAL INTERNS AND OVER A DOZEN LOCAL AND LONG-DISTANCE VOLUNTEERS IN FY 2016/2017, GENEALOGY STAFF AND VOLUNTEERS COMPLETED 35 TRANSLATION REQUESTS AND 57 IN-DEPTH RESEARCH PROJECTS, CREATED SEVERAL NEW IN-HOUSE INDEXES AND DATABASES, AND ADDED 120 IMMIGRANT FILES TO THE VERTICAL FILE COLLECTION AND UPDATED MANY MORE WITH THE ASSISTANCE OF A DANISH ARCHIVING INTERN, OVER 500 ITEMS WERE CATALOGUED INTO THE GENEALOGY CENTER'S LIBRARY AND SPECIAL COLLECTIONS, FROM BOOKS AND REFERENCE MATERIALS TO UNIQUE FAMILY DOCUMENTS AND PHOTOGRAPHS |

**990 Schedule O, Supplemental Information**

| <b>Return Reference</b>                      | <b>Explanation</b>   |
|--|--|
| FORM 990,<br>PAGE 2,<br>PART III,<br>LINE 4D | THE DESIGN STORE DISPLAYS ITEMS AND SELLS ITEMS REFLECTING THE BEST IN DANISH DESIGN AND BOOKS ABOUT DENMARK AND DANISH-AMERICAN RELATIONS INVENTORY IS SELECTED THAT REFLECTS THE MUSEUM'S MISSION OF EDUCATING AND INFORMING ITS PUBLIC AND INCLUDES ITEMS FROM FURNITURE TO LIGHTING TO JEWELRY AND HOME INTERIOR DECORATION AND BOOKS RANGING FROM ACADEMIC STUDIES TO ENTERTAINING FOLKLORE TOURS & PROMOTION OF A 19TH CENTURY HISTORICAL DANISH HOUSE |

# 990 Schedule O, Supplemental Information

| Return Reference                | Explanation |
|---------------------------------|-------------|
| FORM 990,<br>PART V,<br>LINE 4B | DENMARK     |

## 990 Schedule O, Supplemental Information

| Return Reference                             | Explanation  |
|--|--|
| FORM 990,<br>PAGE 6,<br>PART VI,<br>LINE 11B | RETURN IS EMAILED TO THE EXECUTIVE DIRECTOR AND BOARD MEMBERS BEFORE BEING FILED IN ORDER FOR EVERYONE TO REVIEW AND COMMENT PRIOR TO FILING |

**990 Schedule O, Supplemental Information**

| <b>Return Reference</b>                      | <b>Explanation</b>   |
|--|--|
| FORM 990,<br>PAGE 6,<br>PART VI,<br>LINE 12C | BOARD MEMBERS ABSTAIN FROM ANY DECISIONS INVOLVING POTENTIAL CONFLICTS OF INTEREST |

# 990 Schedule O, Supplemental Information

| Return Reference                             | Explanation   |
|--|---|
| FORM 990,<br>PAGE 6,<br>PART VI,<br>LINE 15A | EXECUTIVE DIRECTOR RECEIVES A REVIEW FROM THE BOARD OF DIRECTORS ANNUALLY AT THAT TIME, THE BOARD DETERMINES HIS SALARY FOR THE COMING YEAR |



**990 Schedule O, Supplemental Information**

| <b>Return Reference</b>                      | <b>Explanation</b>  |
|--|---|
| FORM 990,<br>PAGE 6,<br>PART VI,<br>LINE 15B | REMAINING EMPLOYEES RECEIVE ANNUAL PERFORMANCE REVIEWS CONDUCTED BY THE EXECUTIVE DIRECTOR AND ONE OR MORE BOARD MEMBERS AT WHICH TIME COMPENSATION IS DETERMINED |

## 990 Schedule O, Supplemental Information

| Return Reference                            | Explanation  |
|---|--|
| FORM 990,<br>PAGE 6,<br>PART VI,<br>LINE 19 | GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE MADE AVAILABLE TO THE PUBLIC UPON REQUEST IN ADDITION, COPIES OF THE MOST RECENTLY FILED FORMS 990 ARE AVAILABLE ON GUIDESTAR'S WEBSITE |

**990 Schedule O, Supplemental Information**

| <b>Return Reference</b>         | <b>Explanation</b>                   |
|---------------------------------|--------------------------------------|
| FORM 990,<br>PART XI,<br>LINE 9 | BOOK / TAX DEPRECIATION DIFFERENCE 5 |