Exemption Application

3500

Organization Information

California corporation number/California Secretary of Sta	te file number	FEIN				
Name of organization as shown in the organization's creating document			Web address			
Street address (suite, room, or PMB no.)						
City			State	ZIP code		
Telephone	Second telephone		Fax			
Representative Information						

Name of representative		Email address		
	Street address (suite, room, or PMB no.)			
	City		State	ZIP code
	Telephone	Second telephone	Fax	1

General Questions

Part I **Organizational Structure** If the listed documents are not provided, the organization's request for exemption will be delayed, or denied, Copies are acceptable. 1 See General Information F, Foreign Corporations. 2 Is this a trust?..... See General Information H, Trusts. 3 Is this a limited liability company (LLC)? 3 🗆 Yes 🗆 No See General Information I, Limited Liability Companies. **a** Is the parent organization a nonprofit organization? \square **Yes** \square **No** If "Yes," enter parent's employer identification number (EIN) _ If "No," STOP, the LLC does not qualify for California tax-exempt status. 4 5 See General Information L, Group Exemption.

Mail form FTB 3500 to: EXEMPT ORGANIZATIONS UNIT MS F120, FRANCHISE TAX BOARD, PO BOX 1286, RANCHO CORDOVA, CA 95741-1286.

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

DATE

SIGNATURE OF OFFICER OR REPRESENTATIVE

TITLE

Part	II Narrative of Activities
1	Was the organization's California tax-exempt status previously revoked? 1 Yes No
	If "No," the organization may qualify to file form FTB 3500A, Submission of Exemption Request. For more information, get form FTB 3500A.
2	Enter the California Revenue and Taxation Code (R&TC) section that best fits the organization's purpose/activity. See the Exempt Classification Chart on page 6. R&TC Section 23701
3	Enter the date the organization formed
4	What is the organization's annual accounting period ending?
	(must end on the last day of the calendar or fiscal year)
5	What is the primary purpose of the organization?
6	Is the organization currently conducting, or plan to conduct activities?
	If "Yes," enter the date the activities began, or will begin
	If "No," explain why the organization is not planning any activities.

Part II Narrative of Activities (continued)

7 Describe the organization's past, present, and planned activities below. Do not merely refer to or repeat the language in the organizational document. List each activity separately, in the order of importance based on the relative time and other resources devoted to the activity. Indicate the percentage of time for each activity. Each description should include a:

a Detailed description of the activity, including its purpose and how it furthers the organization's exempt purpose.

b Detailed description of when the activity was or will be initiated.

c Detailed description of where and by whom the activity will be conducted.

Organization name:

Pa	rt III	Financial Data			
1	a Has	the organization filed the Form 199, California Exempt Organization Annual Information Return, for the current			
	and	prior years?	1 a	🗆 Yes	□No
	b Has	the organization filed the FTB 199N, California e-Postcard, for the current and prior years?	1b	\Box Yes	□No

We will review information reported on previously filed Form 199s to determine exemption eligibility. If the FTB 199Ns were filed or no returns were filed, attach a detailed income and expense statement for the current year and three previous years. If you are not yet active, attach a proposed budget covering the next four years.

Part IV Officers, Directors, and Trustees

1 List names, titles, and mailing addresses of all officers, directors, and trustees whether or not compensation is or will be paid. For each person listed, state their total annual compensation, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet.

Name	Title	Mailing Address	Compensation Amount (annual actual or estimated)

2	Will any incorporator, founder, board member or other person(s) or entity:		
	a Share any facilities with the organization? a	🗆 Yes	□No
	b Rent, sell, or transfer property to this organization? b	\Box Yes	□No
	${f c}$ Be compensated for services other than performing as a board member or employee? ${f c}$	\Box Yes	□No
Ра	rt V History		
1	Has the organization been issued any previous California ID number?	🗆 Yes	□No
2	Was this organization's exemption previously revoked by the Internal Revenue Service?	□Yes	□No
	If "Yes," enter date revoked	/	VVVV
Pa	rt VI Fund Raising	uu ,	уууу

1 Does or will the organization participate in fund-raising activities? 1 🗆 Yes 🗆 No

If "Yes," check all the fund-raising programs the organization conducts, or will conduct.

- $\hfill\square$ Mail solicitations
- Email solicitations
- □ Personal solicitations
- □ Vehicle, boat, plane, or similar donations
- □ Foundation grant solicitations

- □ Phone solicitations
- $\hfill\square$ Accept donations on the organization's website
- □ Receive donations from another organization's website
- \Box Government grant solicitations
- □ Other Attach description

- 0			
Ра	rt VII Specific Activities		
1	Does the organization conduct any gaming activities (bingo, raffles, etc.) 1	🗆 Yes	□No
2	Does the organization lease property from others?	□Yes	□No
	If "Yes," attach copy of lease agreement.		
3	Does the organization lease property to others?	□Yes	□No
	If "Yes," attach copy of lease agreement.		
4	Does or will the organization publish, sell, or distribute any literature?	□Yes	□No
5	Does or will the organization own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other intellectual property?	□ Yes	□No
6	Does or will the organization accept contributions of real property, conservation easements, closely held securities, intellectual property such as patents, trademarks, and copyrights, works of music or art licenses, royalties, automobiles, boats, planes, or other vehicles, or collectibles of any type?	□Yes	□No
7	Does or will the organization operate outside of the United States?	□Yes	

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Schedule 1

Sect	ion A	R&TC Section 23701a – Labor, agricultural, or horticultural organization		
1	Are an	/ services to be performed for members?	1 🗆 Ye:	s 🗆 No
		," explain.		
2	Is the o	organization formed as a cooperative?		
	lf "Yes	" provide a copy of the federal exemption letter showing exemption under IRC Section 501(c)(5)	2 🗆 Ye	s 🗆 No
Sect	ion B	R&TC Section 23701b – Fraternal societies, orders, or associations, etc. (Lodge system with benefits)		
•	-	er the lodge system means carrying on activities under a form of organization that comprises local branches called lodg re largely self-governing and chartered by a parent organization.	es, chapt	ers, or
1	Is the o	organization a college fraternity or sorority or a chapter of a college fraternity or sorority?	1 🗆 Ye	s 🗆 No
	For mo	," college fraternities and sororities generally qualify as organizations described in R&TC Section 23701g. re information, get FTB Pub. 1077, Guidelines for Social and Recreational Organizations. If R&TC Section 23701g s to apply, do not complete Section B. Go to Section G on Schedule 3, Social and recreational organization.		
2		ne organization operate, or plan to operate under the lodge system or for the exclusive benefit of the members of ge system?	2 🗆 Ye	s 🗆 No
3	Is the o	organization a subordinate of a national or state level organization?	3 🗆 Ye	s 🗆 No
		," attach a certificate signed by the secretary of the parent organization certifying that the subordinate is a duly uted body operating under the jurisdiction of the parent body.		
4	Is the o	organization a parent or grand lodge?	4 🗆 Ye	s 🗆 No
5	Descri	be the types of benefits (life, sick, accident, or other benefits) paid, or to be paid, to members.		
Sect	ion L	R&TC Section 237011 - Fraternal beneficiary societies, orders, or associations, etc. (Lodge system with no benefit	s)	
•	-	er the lodge system means carrying on activities under a form of organization that comprises local branches (called lodg re largely self-governing and chartered by a parent organization.	jes, chap	ers, or
1	Is the o	organization a college fraternity or sorority, or a chapter of a college fraternity or sorority?	1 🗆 Ye	s 🗆 No
	For mo	," college fraternities and sororities generally qualify as organizations described in R&TC Section 23701g. re information, get FTB Pub. 1077, Guidelines for Social and Recreational Organizations. If R&TC Section 23701g s to apply, do not complete Section L. Go to Section G on Schedule 3, Social and recreational organization.		
2		he organization operate or plan to operate under the lodge system or for the exclusive benefit of the members of e system?	2 🗆 Ye	s 🗆 No
3	Is the o	organization a subordinate of a national or state level organization?	3 🗆 Ye	s 🗆 No
4	Is the o	organization a parent or grand lodge?	4 🗆 Ye	s 🗆 No

Organ	ization	name:	
e. g			

Schedule 2

Section D R&TC Section 23701d – Religious, charitable, scientific, literary, or educational organization 1 Check the box(es) below that best describes the organization. Charitable Educational □ Credit Counseling □ Synagogue School Testing for public safety □ Church □ Literary □ Hospital, Medical Center □ Temple □ Scientific □ Qualified sports organization □ Mosque □ Religious □ Prevent cruelty to children or animals Has the organization received or expect to receive 10% or more of its assets from any organization or group of affiliated 2 organizations (affiliated through stockholding, common ownership, or otherwise), any individuals, or members of a family 3 4 5 Does the organization hold, or plan to hold, 10% or more of any class of stock or 10% or more of the total combined 6 а If "Yes," complete Schedule 2A, Churches. If "Yes," complete Schedule 2B, Hospitals. If "Yes," complete Schedule 2C, Credit Counseling Organizations.

n	rganization	name	
υ	IYanizalion	name.	

Schedule 2A – Churches

Comp	ete Schedule 2A only if the organization answered "Yes" to Specific Section D, Question 6a.
1	Check the box that best describes the organization.
•	
2	Has a place of worship been established?
2	If "Yes," at what address? Who is the legal owner of the property? Other property use?
	If "No," explain where religious services are held.
3	Does the organization have a regular congregation or conduct religious services on a regular basis?
	If "Yes," how many usually attend the regular worship services? How often are religious services held?
	If "No," explain.
4	Explain the background and training of the religious leaders.
5	Will income be received from incorporators, ministers, officers, directors, or their families?
	If "Yes," explain, including dollar amounts received.
6	Will any founder, member, or officer take a vow of poverty?
	lf "Yes," explain.
7	Will any founder, member, or officer transfer personal assets to this organization, like a home, automobile, furnishings,
	business, or recreational assets, etc., that will be made available for the personal use of the donors?
	If "Yes," explain.

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Schedule 2A Churches continued

Corp number/CA SOS file number: _____

Schedule 2A – Churches (continued)

8	Will any founder, member, or officer assign or donate income to the organization that will be used to pay their own personal salary, living allowance, or that will result in any other personal benefit (such as food, medical expenses, clothing, insurance, etc.)? 8 If "Yes," explain.	□Yes	□No
9	Does the organization have a written creed, statement of faith, or summary of beliefs?	□Yes	
10	Do the religious leaders conduct baptisms, weddings, funerals, etc.?	□Yes	
	If "Yes," explain.		
11	Does the organization ordain, commission, or license ministers or religious leaders?	□Yes	□No
	If "Yes," describe.		

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Schedule 2B - Hospitals

Comp	lete	Schedule 2B only if the organization answered "Yes" to Specific Section D, Question 6b. Attach a statement to explain any answ	vers.	
1		e all the doctors in the community eligible for staff privileges?	□Yes	□No
2	а	Does or will the organization provide medical services to all individuals in the community who can pay for themselves or have private health insurance?	□ Yes	□No
	b	Does or will the organization provide medical services to all individuals in the community who participate in Medicare?	□ Yes	□No
3	а	Does or will the organization require persons covered by Medicare or Medicaid to pay a deposit before receiving services?	□Yes	□No
	b	Does the same deposit requirement, if any, apply to all other patients?	□ Yes	□No
4	а	Does or will the organization maintain a full-time emergency room?	□Yes	□No
	b	Does the organization have a policy on providing emergency services to persons without apparent means to pay? \dots 4b If "Yes," provide a copy of the policy.	□ Yes	□No
	C	Does the organization have any arrangements with police, fire, and voluntary ambulance services for the delivery or admission of emergency cases?	□Yes	□No
5		Does the organization provide for a portion of the organization's services and facilities to be used for charity patients? 5a If "Yes," answer question 5b through question 5e. Explain the organization's policy regarding charity cases, including how the organization distinguishes between charity care and bad debts. Submit a copy of the written policy.	□ Yes	□ No
	C	Provide data on the organization's past experience in admitting charity patients, including the amounts expended for treating charity care patients and types of services provided to charity care patients.		
	d	Describe any arrangements with federal, state, or local governments or government agencies for paying for the cost of treating charity care patients. Submit copies of any written agreements.		
	e	Does the organization provide services on a sliding fee schedule depending on financial ability to pay? 5e If "Yes," submit the sliding fee schedule.	□ Yes	□No
6	а	Does or will the organization carry on a formal program of medical training or medical research?	□ Yes	□ No
	b	Does or will the organization carry on a formal program of community education?	□ Yes	□No

Schedule 2B Hospitals continued

Schedule 2B - Hospitals (continued)

7	Does or will the organization provide office space to physicians carrying on their own medical practices? If "Yes," describe the criteria for determining who may use the space, explain the means used to determine that the organization is paid at least fair market value, and submit representative lease agreements.	7	□ Yes	□No
8	Is the board of directors comprised of a majority of individuals who are representative of the community served? Include a list of each board member's name, and business, financial, or professional relationship with the hospital. Also identify each board member who is representative of the community and describe how that individual is a community representative.	8	□Yes	□ No
9	Does the organization participate in any joint ventures? If "Yes," state the ownership percentage in each joint venture, list the investment in each joint venture, describe the tax status of other participants in each joint venture (including whether they are IRC Section 501(c)(3) organizations), describe the activities of each joint venture, describe how the organization exercises control over the activities of each joint venture, and describe how each joint venture furthers the organization's exempt purposes. Also, submit copies of all agreements.	9	□ Yes	□ No
10	Does or will the organization manage its activities or facilities through its employees or volunteers?	10	□ Yes	□ No
11	Does or will the organization offer recruitment incentives to physicians?	11	□ Yes	□No
12	Does or will the organization lease equipment, assets, or office space from physicians who have a financial or professional relationship with the organization?	12	□Yes	□No
13	Has the organization purchased medical practices, ambulatory surgery centers, or other business assets from physicians or other persons who have a business relationship with the organization, aside from the purchase?	13	□Yes	□ No
14	Has the organization adopted a conflict of interest policy? If "Yes," submit a copy of the policy and explain how the policy has been adopted, such as by resolution of the governing board. If "No," explain how the organization will avoid any conflicts of interest in business dealings.	14	□ Yes	□No

Schedule 2C - Credit Counseling Organizations

Complete Schedule 2C only if the organization answered "Yes" to Specific Section D, Question 6c or Specific Section F, Question 2.

1	Are the services tailored to the specific needs and circumstances of consumers?			□No
2	Does the organization make loans to debtors (other than loans with no fees or interest)?	2	🗆 Yes	□No
3	Does the organization negotiate the making of loans on behalf of debtors?	3	□Yes	□No
4	Does the organization provide services for the purpose of improving a consumer's credit record, credit history, or credit rating?	4	🗆 Yes	□No
	If "Yes," are such services incidental to credit counseling?		🗆 Yes	□No
5	Does the organization charge any separately stated fee for services for the purpose of improving any consumer's credit record, credit history, or credit rating?	5	🗆 Yes	□No
6	Does the organization refuse to provide credit counseling services to a consumer due to the consumer's inability to pay, the ineligibility of the consumer for debt management plan enrollment, or the unwillingness of the consumer to enroll in a debt management plan?	6	🗆 Yes	□ No
7	Did the organization establish and implement a fee policy that requires any fees to be reasonable and allows for a waiver of fees if the consumer is unable to pay?	7	🗆 Yes	□No
8	Did the organization establish and implement a fee policy that prohibits charging any fee based in whole or in part on a percentage of the consumer's debt, the consumer's payments to be made pursuant to a debt management plan, or the projected or actual savings to the consumer resulting from enrolling in a debt management plan?	8	□ Yes	□ No
9	At all times, is the organization's governing body controlled by persons who represent the broad interests of the public, persons having special knowledge or expertise in credit or financial education, and community leaders?	9	🗆 Yes	□No
10	Is 20% or less of the organization's voting power vested in persons who are employed by the organization or who will benefit financially, directly or indirectly, from the organization's activities (other than through the receipt of reasonable directors' fees or repayment of consumer debt to creditors other than the credit counseling organization or its affiliates)?	10	□ Yes	□ No
11	Is 49% or less of the organization's voting power vested in persons who are employed by the organization or who will benefit financially, directly or indirectly, from the organization's activities (other than through the receipt of reasonable directors' fees)?	11	□ Yes	□ No
12	Does the organization own more than 35% of a corporation, partnership, trust, or estate that is in the trade or business of lending money, repairing credit, or providing debt management plan services, payment processing, or similar services?	12	🗆 Yes	□No
13	Does the organization receive any amounts for providing referrals to others for debt management plan services or pay any amount to others for obtaining referrals of consumers?	13	□ Yes	□No
14	Does the organization solicit contributions from consumers during the initial counseling process or while the consumer is receiving services from the organization?	14	🗆 Yes	□No
15	Do the aggregate revenues of the organization, which are from payments of creditors of consumers of the organization and which are attributable to debt management plan services, exceed 50% of the total revenues of the organization? If the Transition rule in IRC Section 501(q)(2)(B)(ii) applies, please attach a statement of explanation.	15	□ Yes	□No
16	If the organization is a credit counseling organization, did the organization receive federal exemption under IRC Section 501(c)(4)?	16	□Yes	□No

Corp number/CA SOS file number: _____

Schedule 3

Sec	tion E	R&TC Section 23701e – Business league, chamber of commerce, professional association, or society		
1	such a purcha	e organization performed, or does it plan to perform, particular services for members, shareholders, or others s furnishing credit reports or collection accounts, inspecting products, conducting advertising, asing merchandise, coupon redemption services, or other similar undertakings?	1 □Yes	□No
		aged in advertising attach samples of materials.		
Sec	tion F	R&TC Section 23701f – Civic league, social welfare organization, or local association of employees		
1	Explair	n in detail how the organization promotes the common good or welfare of an entire community?		
2		organization a credit counseling organization?	2 🗆 Yes	□ No
Sec		R&TC Section 23701g – Social and recreational organization		
To be 35% get F	e exempt of gross TB Pub. 1	under R&TC Section 23701g, income from a combination of investment income and receipts from the general public sh receipts. However, general public income is not to represent more than 15% of total receipts (Public Law 94-568). For n 1077, Guidelines for Social and Recreational Organizations.	nore inforn	
1		nany total members does the organization have?		
2		he organization have different classes of membership?	2 🗆 Yes	
3		a portion of the organization's income come from the general public's use of club facilities, participation in club es, or purchases made in the form of food, beverages, or merchandise?	3 🗆 Yes	□No
	If "Yes	," provide a schedule detailing member and nonmember income.		
4		e organization derived, or will it derive, any income from nonmembers (including investments, advertising, and receipts from the general public) that will amount to 35% or more of the total income?	4 🗆 Yes	□No
5	Has th	e organization rented, leased, or sold, or does it plan to rent, lease, or sell any part of the club's property to others?	5 🗆 Yes	

Schedule 4

Section H R&TC Section 23701h – Title holding organization

R&TC Section 23701h requires turning over net income to a parent organization periodically. Organizations with members, incorporating as a nonprofit corporation under the California Corporations Code, are precluded from exempt status under R&TC Section 23701h. California Corporations Code Sections 5410 and 7411 prohibit any distribution to members of nonprofit public benefit corporations or nonprofit mutual benefit corporations unless the organization dissolves.

- - a List the name, federal employer identification number (FEIN), address, and number of shares held by each shareholder or parent organization. Indicate if the parent organization has California tax-exempt status. Attach another sheet if necessary.

Name	FEIN	Address	Number of Shares	Tax-exempt status

b Describe the property being held, including cost or approximate value, and address.

2 Does the organization turn over net income to a parent organization?..... 2 🗆 Yes 🗆 No

Schedule 4 (continued)

Section X R&TC Section 23701x – Title holding organization

R&TC Section 23701x requires turning over net income to specified parent organizations periodically. Organizations with members incorporating as a nonprofit corporation under the California Corporations Code are precluded from exempt status under R&TC Section 23701x. California Corporations Code Sections 5410 and 7411 prohibit any distribution to members of nonprofit public benefit corporations or nonprofit mutual benefit corporations unless the organization dissolves.

1	Is the organization currently holding title to property or does the organization plan to hold title to property?	1 🗆 Yes	🗆 No
	If "Yes," answer guestion 1a and guestion 1b.		

a List the name, FEIN, address, and the number of shares of capital stock held by each parent organization. Indicate if parent organization has federal tax-exempt status. Attach another sheet if necessary.

Name	FEIN	Address	Number of Shares	Tax-exempt status

b Describe the property being held, including cost or approximate value and address.

- 2 For those parent organizations that the organization holds property for and which do not have a federal exemption determination letter, provide detailed information to show that each shareholder is:
 - **a** A governmental plan described in IRC Section 414(d).
 - **b** The United States, any state or political subdivision thereof, or any agency or instrumentality of the foregoing.

3	Does the organization turn over net income to a parent organization?	3 □Yes	\Box No
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Schedule 5

Sec	tion C R&TC S	Section 23701c – Cemeteries, crematoria, and like corporations	
1	•	zation currently own or plan to purchase cemetery property? 1 Yes re is the property located?	□No
	b What is the co	ost or estimated current value of property owned?	
2		zation have a perpetual care fund?	□No
Sec	tion I R&TC Se	ection 23701i – Voluntary employees' beneficiary organization	
1	Describe the vol	luntary employees' beneficiary organization.	
2	•	zation have a federal exemption determination letter under IRC Section 501(c)(9)	
Sec	tion U R&TC S	Section 23701u – Public facility financial corporation	
1	Has a certificate	e of participation or other securities been issued?	□No
		ses, contracts, trust agreements, or other agreements that have been, or will be, entered into by this corporation.	
Sec	tion V R&TC S	Section 23701v – Mobile home park acquisition organization	
1	mobile home pa	s of the organization owners of manufactured homes, mobile homes, or mobile home tenants of the ark?	□ No
2	members reside	ation carry on activities other than purchasing or preparing to purchase the mobile home park in which ?	□ No
3		B 3500 2023 7229233	

Schedule 6

Sec	tion T	R&TC Section 23701t – Homeowners' association
1		u have a recorded Declaration of Covenants, Conditions, and Restrictions?
2	a R b C (H	se of the organization is to manage and maintain: esidential association property of members?
3	Descri	ibe the types of units/lots/property in the association (single dwelling, condominium, condominium conversion, live/work, timeshare, er).
4	Have a	any units/lots been sold?
	If "No	," when will the first unit be available for sale?
	lf "Yes	s," when was the first unit sold?
5	When	were, or will dues first be collected?
6		ny of the units be rented by a person or series of persons, for periods of less than 30 days that, when added Iner, equal more than half of the association's taxable year?
7		/ill any of the individual units/lots owned by the organization or its members be used for nonresidential urposes?
	b If	"Yes," what is the percentage of the units/lots that will be used for nonresidential purposes?
8	Condo	ominium management associations only:
		any square footage used for nonresidential purposes?
9	Reside	ential real estate management associations only:
	a Ar	re any lots zoned nonresidential or used for nonresidential purposes?
	b If	"Yes," what is total number of lots and how many are nonresidential?
10	a W	/hat is the association's total gross income?
	b W	/hat is the total gross income from nonresidential sources?
11	a W	/hat are the association's total expenditures?
	b W	/hat are the total expenditures for nonresidential purposes?
12	or oth	nis organization own, maintain, or operate a mutual water company, well, electrical generating facility, er utility?

Section T continued

Corp number/CA SOS file number: _____

Schedule 6 (Continued)

Sec	tion T R&TC Section 23701t – Homeowners' association (continued)	
13	Are the members/shareholders the actual users of the utility or simply investors?	
14	Is this organization furnishing utilities to (check applicable boxes)?	
	If both, what percent of this organization's total income will be derived from the sale of utilities for nonresidential usage?	
15	Are the members/shareholders assessed equally on the basis of square footage/acreage?	No
16	Are meters utilized to determine charges to members/stockholders? 16 🗆 Yes 🗆 N	No

Schedule 7

Secti	ion W	R&TC Section 23701w – War veterans' organization			
1		a post or organization of past or present members of the Armed Forces of the United States?		1 🗆 Yes	🗆 No
	a W	/hat is the total membership of the post or organization?) 		
		ow many members are present or former members of the Armed Forces of the United States? I ow many members are cadets (include students in college, university, or armed services academies)?			
	d He	ow many are spouses/RDPs, qualifying surviving spouse/RDP of cadets or of past or present members the Armed Forces of the United States?			
	e Do	oes the organization have any other membership category?		e 🗆 Yes	□No
	Explai	n in detail including the number of members in each category.			
2		an auxiliary unit, society, post, or organization of past or present members of the d Forces?		2 🗆 Yes	
	lf "Yes	s," complete the following			
		the organization affiliated with and organized according to the bylaws and regulations formulated / such an exempt post or organization?)		
	b He	ow many members does the organization have? I			
	ha (g	ow many members are past or present members of the Armed Forces of the United States, or ave spouses/RDPs or persons related to them within two degrees of blood relationship rrandparents, brothers, sisters, and grandchildren are the most distant relationships allowable) at are past or present members of the Armed Forces of the United States?	;		
	A	re all of the members themselves members of a post or organization, past or present members of the rmed Forces of the United States, or spouses/RDPs of members of such a post or organization, or related members of such a post or organization within two degrees of blood relationship?		d 🗆 Yes	□ No

Corp number/CA SOS file number: _____

Schedule 8

Sec	ion Y	R&TC Section 23701y – Credit union (state chartered effective on or after January 1, 1999)		
1	Provide	a copy of the organization's license to operate as a credit union.		
2	What is	the total number of members of the organization? 2		
3	Does th	e organization have a federal charter?	3 □Yes	□No
	lf "Yes,	' provide a copy.		
4	Does th	e organization operate outside of California?	4 □Yes	□No
Section AA R&TC Section 23701aa – Public bank				
1	List the local agency, local agencies, or a joint powers authority formed pursuant to the Joint Exercise of Powers Act that wholly owns the public bank.			

2 Attach a copy of the certificate of authorization to transact business as a bank.