

2002

Open to Public Inspection

Form **990-EZ**

**Short Form**  
**Return of Organization Exempt From Income Tax**

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

► For organizations with gross receipts less than \$100,000 and total assets less than \$250,000 at the end of the year

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

Department of the Treasury  
Internal Revenue Service

**A** For the 2002 calendar year, or tax year beginning JANUARY 1, 2002, and ending DECEMBER 31, 2002

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type See Specific Instructions	<b>C</b> Name of organization <u>ADULT CONGENITAL HEART ASSOC., INC</u>	<b>D</b> Employer identification number <u>04-3447959</u>
		Number and street (or P.O. box if mail is not delivered to street address) Room/suite <u>273 PERHAM ST.</u>	<b>E</b> Telephone number <u>(617) 325-1191</u>
		City or town, state or country, and ZIP + 4 <u>W. ROXBURY, MA 02132</u>	<b>F</b> Enter 4-digit (GEN) ►

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

**G** Accounting method  Cash  Accrual  
Other (specify) ►

**I** Web site ► www.achaheart.org

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

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

**K** Check  if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS, but if the organization received a Form 990 Package in the mail, it should file a return without financial data. **Some states require a complete return**

**L** Add lines 5b, 6b, and 7b to line 9 to determine gross receipts. If \$100,000 or more, file Form 990 instead of Form 990-EZ. ► \$

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See page 36 of the instructions)

		1	2	3	4	5a	5b	5c	6a	6b	6c	7a	7b	7c	8	9	10	11	12	13	14	15	16	17	18	19	20	21								
Revenue	1	Contributions, gifts, grants, and similar amounts received														4478.35																				
	2	Program service revenue including government fees and contracts														0																				
	3	Membership dues and assessments														3620.00																				
	4	Investment income														0																				
	5a	Gross amount from sale of assets other than inventory																																		
	5b	Less cost or other basis and sales expenses																																		
	5c	Gain or (loss) from sale of assets other than inventory (line 5a less line 5b) (attach schedule)														0																				
	6	Special events and activities (attach schedule)																																		
	6a	Gross revenue (not including \$ _____ of contributions reported on line 1)																																		
6b	Less direct expenses other than fundraising expenses																																			
6c	Net income or (loss) from special events and activities (line 6a less line 6b)														0																					
7a	Gross sales of inventory, less returns and allowances																																			
7b	Less cost of goods sold																																			
7c	Gross profit or (loss) from sales of inventory (line 7a less line 7b)														0																					
8	Other revenue (describe ► <u>conference registrations, sale of migr + bears</u> )														6068																					
9	<b>Total revenue</b> (add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8)														14,166.35																					
Expenses	10	Grants and similar amounts paid (attach schedule)													0																					
	11	Benefits paid to or for members													0																					
	12	Salaries, other compensation, and employee benefits													0																					
	13	Professional fees and other payments to independent contractors													0																					
	14	Occupancy, rent, utilities, and maintenance													0																					
	15	Printing, publications, postage, and shipping													4,005.93																					
	16	Other expenses (describe ► <u>telephone calls, supplies, insurance, conference</u> )													13,652.73																					
17	<b>Total expenses</b> (add lines 10 through 16)													17,658.66																						
Net Assets	18	Excess or (deficit) for the year (line 9 less line 17)													(3492.31)																					
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)													10,998.92																					
	20	Other changes in net assets or fund balances (attach explanation)													0																					
	21	<b>Net assets or fund balances at end of year</b> (combine lines 18 through 20)													7,506.61																					

**Part II Balance Sheets**—If Total assets on line 25, column (B) are \$250,000 or more, file Form 990 instead of Form 990-EZ

(See page 39 of the instructions)

		(A) Beginning of year	(B) End of year
22	Cash, savings, and investments	10,998.92	7506.61
23	Land and buildings	0	0
24	Other assets (describe ► _____)	0	0
25	<b>Total assets</b>	10,998.92	7506.61
26	<b>Total liabilities</b> (describe ► _____)	0	0
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	10,998.92	7506.61

For Paperwork Reduction Act Notice, see the separate instructions

P 24

SCANNED MAY 05 '03

Part III Statement of Program Service Accomplishments (See page 39 of the instructions)		Expenses (Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts optional for others)
What is the organization's primary exempt purpose? <u>EDUCATIONAL RESOURCE</u>		
Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner describe the services provided, the number of persons benefited, or other relevant information for each program title		
28	<u>Newsletter - Personal Stories, Articles by Medical Professionals, Event and Resource Information</u> Circulation: 1300 Quarterly (Grants \$)	28a 2658.34
29	<u>Website - Message Boards, Links to Resources, Info on Support Groups and Events, Online Version of Newsletter</u> (Grants \$)	29a 374.20
30	<u>Conference - April 2002 - In conjunction with Loyola University Medical Center in Chicago</u> (Grants \$)	30a 9967.51
31	Other program services (attach schedule) <u>5000 Brochures - Basic Info</u> (Grants \$)	31a 1347.59
32	<b>Total program service expenses (add lines 28a through 31a)</b>	<b>32 14,347.64</b>

Part IV List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated. See page 40 of the instructions)				
(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
<u>Amy Verstappen</u> <u>550 W. Ellet St Philadelphia PA 19119</u>	<u>President</u> <u>15 HRS WK</u>	<u>0</u>	<u>0</u>	<u>0</u>
<u>Robin Layman</u> <u>17321 Marion Dr, Lowell, IN 46356</u>	<u>Vice President,</u> <u>10 HRS WK</u>	<u>0</u>	<u>0</u>	<u>0</u>
<u>Donna Turransky</u> <u>4 Darrell Drive, Randolph MA 02368</u>	<u>Clerk,</u> <u>4 HRS WK</u>	<u>0</u>	<u>0</u>	<u>0</u>

Part V Other Information (Note the attachment requirement in General Instruction V, page 14)		Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		X
34	Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes		X
35	If the organization had income from business activities, such as those reported on lines 2, 6, and 7 (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T		X
a	Did the organization have unrelated business gross income of \$1,000 or more or 6033(e) notice, reporting and proxy tax requirements?		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? (If "Yes," attach a statement)		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions	37a	
b	Did the organization file Form 1120-POL for this year?		X
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?		X
b	If "Yes," attach the schedule specified in the line 38 instructions and enter the amount involved	38b	
39	501(c)(7) organizations Enter a Initiation fees and capital contributions included on line 9	39a	
b	Gross receipts included on line 9, for public use of club facilities	39b	
40a	501(c)(3) organizations Enter Amount of tax imposed on the organization during the year under section 4911 <u>0</u> , section 4912 <u>0</u> , section 4955 <u>0</u>		
b	501(c)(3) and (4) organizations Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach an explanation		X
c	Amount of tax imposed on organization managers or disqualified persons during the year under 4912, 4955, and 4958		<u>0</u>
d	Enter Amount of tax on line 40c, above, reimbursed by the organization		<u>0</u>
41	List the states with which a copy of this return is filed		<u>MA, IL, OR, NH, MD, NJ</u>
42	The books are in care of <u>MARY R. KLEIN</u> Telephone no <u>(617) 325-1191</u> Located at <u>273 PERHAM ST., W. ROXBURY, MA 02132</u> ZIP + 4 <u>02132-3728</u>		
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041—Check here <input type="checkbox"/> and enter the amount of tax exempt interest received or accrued during the tax year <u>43</u>		

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.

Please MARY R. KLEIN Date 3/4/03

ASURER

Date \_\_\_\_\_ Check if \_\_\_\_\_ Preparer's SSN or PTIN (See Gen. Inst. W)

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

**Organization Exempt Under Section 501(c)(3)**

OMB No 1545 0047

(Except Private Foundation) and Section 501(e), 501(f), 501(k),  
501(n), or Section 4947(a)(1) Nonexempt Charitable Trust

**2002**

**Supplementary Information—(See separate instructions.)**

Department of the Treasury  
Internal Revenue Service

▶ **MUST be completed by the above organizations and attached to their Form 990 or 990-EZ**

Name of the organization

*Adult Congenital Heart Association Inc.*

Employer identification number

*04 3447959*

**Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees**  
(See page 1 of the instructions. List each one. If there are none, enter "None.")

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
<i>No compensated Employees -</i>				
<i>All volunteer organization</i>				

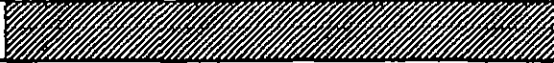
Total number of other employees paid over \$50,000 . . . . . ▶



**Part II Compensation of the Five Highest Paid Independent Contractors for Professional Services**  
(See page 2 of the instructions. List each one (whether individuals or firms) if there are none, enter "None.")

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
<i>No compensated independent contractors</i>		

Total number of others receiving over \$50,000 for professional services . . . . . ▶



**Part III Statements About Activities** (See page 2 of the instructions)

	Yes	No
1 During the year has the organization attempted to influence national state or local legislation including any attempt to influence public opinion on a legislative matter or referendum? If "Yes," enter the total expenses paid or incurred in connection with the lobbying activities ▶ \$ _____ (Must equal amounts on line 38, Part VI-A, or line I of Part VI-B) Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A Other organizations checking "Yes," must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities		✓
2 During the year, has the organization, either directly or indirectly engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director trustee, majority owner or principal beneficiary? (If the answer to any question is "Yes" attach a detailed statement explaining the transactions)		
a Sale exchange, or leasing of property? . . . . .		✓
b Lending of money or other extension of credit? . . . . .		✓
c Furnishing of goods, services or facilities? . . . . .		✓
d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)? . . . . .		✓
e Transfer of any part of its income or assets? . . . . .		✓
3 Does the organization make grants for scholarships fellowships student loans, etc? (See Note below) . . . . .		✓
4 Do you have a section 403(b) annuity plan for your employees? . . . . .		✓ N/A
<b>Note</b> Attach a statement to explain how the organization determines that individuals or organizations receiving grants or loans from it in furtherance of its charitable programs "qualify" to receive payments		

**Part IV Reason for Non-Private Foundation Status** (See pages 3 through 5 of the instructions)

The organization is not a private foundation because it is (Please check only ONE applicable box)

- 5  A church convention of churches or association of churches Section 170(b)(1)(A)(i)
- 6  A school Section 170(b)(1)(A)(ii) (Also complete Part V)
- 7  A hospital or a cooperative hospital service organization Section 170(b)(1)(A)(iii)
- 8  A Federal state or local government or governmental unit Section 170(b)(1)(A)(v)
- 9  A medical research organization operated in conjunction with a hospital Section 170(b)(1)(A)(iii) Enter the hospital's name, city, and state ▶ \_\_\_\_\_
- 10  An organization operated for the benefit of a college or university owned or operated by a governmental unit Section 170(b)(1)(A)(iv) (Also complete the **Support Schedule** in Part IV-A)
- 11a  An organization that normally receives a substantial part of its support from a governmental unit or from the general public Section 170(b)(1)(A)(v) (Also complete the **Support Schedule** in Part IV-A)
- 11b  A community trust Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A)
- 12  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 charitable, etc., 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) (Also complete the **Support Schedule** in Part IV-A)
- 13  An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in (1) lines 5 through 12 above, or (2) section 501(c)(4), (5), or (6) if they meet the test of section 509(a)(2) (See section 509(a)(3))

Provide the following information about the supported organizations (See page 5 of the instructions)

(a) Name(s) of supported organization(s)	(b) Line number from above

- 14  An organization organized and operated to test for public safety Section 509(a)(4) (See page 5 of the instructions)

**Part IV-A Support Schedule** (Complete only if you checked a box on line 10, 11 or 12) *Use cash method of accounting*

**Note** You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting

Calendar year (or fiscal year beginning in)	(a) 2001	(b) 2000	(c) 1999	(d) 1998	(e) Total
15 Gifts, grants and contributions received (Do not include unusual grants See line 28).	9955	8992	1458	3070	23,475
16 Membership fees received	785	535	420	0	1,740
17 Gross receipts from admissions merchandise sold or services performed or furnishing of facilities in any activity that is related to the organization's charitable etc purpose	4315	0	0	0	4315
18 Gross income from interest dividends amounts received from payments on securities loans (section 512(a)(5)) rents royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30 1975	0	0	5	0	5
19 Net income from unrelated business activities not included in line 18	0	0	0	0	0
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf	0	0	0	0	0
21 The value of services or facilities furnished to the organization by a governmental unit without charge Do not include the value of services or facilities generally furnished to the public without charge.	0	0	0	0	0
22 Other income Attach a schedule Do not include gain or (loss) from sale of capital assets	0	0	0	0	0
23 Total of lines 15 through 22.	15,055	9527	1883	3070	29,535
24 Line 23 minus line 17	10,740	9527	1883	3070	25,220
25 Enter 1% of line 23	151	95	19	31	

26 Organizations described on lines 10 or 11	a Enter 2% of amount in column (e) line 24	26a	504
b Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1998 through 2001 exceeded the amount shown in line 26a Do not file this list with your return Enter the total of all these excess amounts		26b	9516
c Total support for section 509(a)(1) test Enter line 24, column (e)		26c	25,220
d Add Amounts from column (e) for lines 18 5 19 0 22 0 26b 9,516		26d	9521
e Public support (line 26c minus line 26d total)		26e	15,699
f Public support percentage (line 26e (numerator) divided by line 26c (denominator))		26f	62.2 %

27 Organizations described on line 12 a For amounts included in lines 15 16, and 17 that were received from a "disqualified person," prepare a list for your records to show the name of, and total amounts received in each year from, each "disqualified person" Do not file this list with your return Enter the sum of such amounts for each year

(2001) ..... (2000) ..... (1999) ..... (1998) .....

b For any amount included in line 17 that was received from each person (other than "disqualified persons") prepare a list for your records to show the name of and amount received for each year, that was more than the larger of (1) the amount on line 25 for the year or (2) \$5 000 (Include in the list organizations described in lines 5 through 11, as well as individuals) Do not file this list with your return After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year

(2001) ..... (2000) ..... (1999) ..... (1998) .....

c Add Amounts from column (e) for lines 15 16 17 20 21		27c	
d Add Line 27a total and line 27b total		27d	
e Public support (line 27c total minus line 27d total).		27e	
f Total support for section 509(a)(2) test Enter amount from line 23 column (e)	27f		
g Public support percentage (line 27e (numerator) divided by line 27f (denominator))		27g	%
h Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))		27h	%

28 Unusual Grants For an organization described in line 10, 11 or 12 that received any unusual grants during 1998 through 2001 prepare a list for your records to show, for each year the name of the contributor, the date and amount of the grant and a brief description of the nature of the grant Do not file this list with your return Do not include these grants in line 15

Part V Private School Questionnaire (See page 7 of the instructions)
(To be completed ONLY by schools that checked the box on line 6 in Part IV)

29 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument or in a resolution of its governing body?
30 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures catalogues, and other written communications with the public dealing with student admissions programs and scholarships?
31 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students or during the registration period if it has no solicitation program in a way that makes the policy known to all parts of the general community it serves?
32 Does the organization maintain the following:
a Records indicating the racial composition of the student body, faculty and administrative staff?
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?
c Copies of all catalogues, brochures, announcements and other written communications to the public dealing with student admissions, programs, and scholarships?
d Copies of all material used by the organization or on its behalf to solicit contributions?
33 Does the organization discriminate by race in any way with respect to:
a Students rights or privileges?
b Admissions policies?
c Employment of faculty or administrative staff?
d Scholarships or other financial assistance?
e Educational policies?
f Use of facilities?
g Athletic programs?
h Other extracurricular activities?
34a Does the organization receive any financial aid or assistance from a governmental agency?
b Has the organization's right to such aid ever been revoked or suspended?
35 Does the organization certify that it has complied with the applicable requirements of sections 4 01 through 4 05 of Rev. Proc. 75-50, 1975-2 C B 587, covering racial nondiscrimination? If "No" attach an explanation

**Part VI-A Lobbying Expenditures by Electing Public Charities** (See page 9 of the instructions)  
 (To be completed **ONLY** by an eligible organization that filed Form 5768)

Check  **a** if the organization belongs to an affiliated group Check  **b** if you checked "a" and "limited control" provisions apply

<b>Limits on Lobbying Expenditures</b>		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
(The term "expenditures" means amounts paid or incurred)			
36	Total lobbying expenditures to influence public opinion (grassroots lobbying)		
37	Total lobbying expenditures to influence a legislative body (direct lobbying)		
38	Total lobbying expenditures (add lines 36 and 37)		
39	Other exempt purpose expenditures		
40	Total exempt purpose expenditures (add lines 38 and 39)		
41	Lobbying nontaxable amount Enter the amount from the following table—		
	<b>If the amount on line 40 is—</b>		
	Not over \$500,000		
	Over \$500,000 but not over \$1,000,000		
	Over \$1,000,000 but not over \$1,500,000		
	Over \$1,500,000 but not over \$17,000,000		
	Over \$17,000,000		
	<b>The lobbying nontaxable amount is—</b>		
	20% of the amount on line 40		
	\$100,000 plus 15% of the excess over \$500,000		
	\$175,000 plus 10% of the excess over \$1,000,000		
	,\$225,000 plus 5% of the excess over \$1,500,000		
	\$1,000,000		
42	Grassroots nontaxable amount (enter 25% of line 41)		
43	Subtract line 42 from line 36 Enter -0- if line 42 is more than line 36		
44	Subtract line 41 from line 38 Enter -0- if line 41 is more than line 38		

**Caution** If there is an amount on either line 43 or line 44, you must file Form 4720

**4-Year Averaging Period Under Section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below  
 See the instructions for lines 45 through 50 on page 11 of the instructions)

Calendar year (or fiscal year beginning in) ▶	Lobbying Expenditures During 4-Year Averaging Period				
	(a) 2002	(b) 2001	(c) 2000	(d) 1999	(e) Total
45	Lobbying nontaxable amount				
46	Lobbying ceiling amount (150% of line 45(e))				
47	Total lobbying expenditures				
48	Grassroots nontaxable amount				
49	Grassroots ceiling amount (150% of line 48(e))				
50	Grassroots lobbying expenditures				

**Part VI-B Lobbying Activity by Nonelecting Public Charities**

(For reporting only by organizations that did not complete Part VI-A) (See page 11 of the instructions)

During the year did the organization attempt to influence national state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum through the use of	Yes	No	Amount
a Volunteers			
b Paid staff or management (Include compensation in expenses reported on lines c through h)			
c Media advertisements			
d Mailings to members, legislators or the public			
e Publications, or published or broadcast statements			
f Grants to other organizations for lobbying purposes			
g Direct contact with legislators, their staffs government officials, or a legislative body			
h Rallies demonstrations seminars, conventions, speeches lectures or any other means			
i Total lobbying expenditures (Add lines c through h)			

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities



SUPPLEMENTAL LIST OF BOARD MEMBERS  
FORM 990-EZ (2002)  
PART IV

Mary Kay Klein  
273 Perham Street  
West Roxbury, MA 02132

Treasurer and Director, 8 hours per week,  
No compensation, benefits, or expense allowances

Nick Alfieri  
450 Maple Street  
Franklin, MA 02038

Director, 3 hours per week  
No compensation, benefits, or expense allowance

Anthony Cordaro, Jr  
4300 Holland, #204  
Dallas, TX 75219

Director, 3 hours per week  
No compensation, benefits, or expense allowance

Karen McNulty  
15 Carol Circle, Apt 1A  
West Roxbury, MA 02132

Director/Newsletter Editor, 8 hours per week  
No compensation, benefits, or expense allowance

Paula Miller  
1146 Huntsman Lane  
Memphis, TN 38120

Director, 3 hours per week  
No compensation, benefits, or expense allowance

Kimberly Ochs  
St. Cross College  
Oxford OX1 3LZ  
UK

Director, 3 hours per week  
No compensation, benefits, or expense allowance

Anthony Pugliese  
107 North 9<sup>th</sup> Street  
Jeannette, PA 15644

Director, 3 hours per week  
No compensation, benefits, or expense allowance