

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 black lung benefit trust or private foundation)

OMB No 1545-0047

2005

Open to Public Inspection

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

A For the 2005 calendar year, or tax year beginning 01-01-2005 and ending 12-31-2005

- B Check if applicable
Address change
Name change
Initial return
Final return
Amended return
Application pending

C Name of organization
Monterey Bay Aquarium Foundation
Number and street (or P O box if mail is not delivered to street address) Room/suite
886 Cannery Row
City or town, state or country, and ZIP + 4
Monterey, CA 93940

D Employer identification number
94-2487469

E Telephone number
(831) 648-4800

F Accounting method
Cash
Accrual
Other (specify)

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

H and I are not applicable to section 527 organizations

H(a) Is this a group return for affiliates? Yes No

H(b) If "Yes" enter number of affiliates

H(c) Are all affiliates included? Yes No
(If "No," attach a list See instructions)

H(d) Is this a separate return filed by an organization covered by a group ruling? Yes No

I Group Exemption Number

M Check if the organization is not required to attach Sch B (Form 990, 990-EZ, or 990-PF)

G Web site: wwwmbayaqorg

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

K Check here 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 Gross receipts Add lines 6b, 8b, 9b, and 10b to line 12 51,515,331

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

Table with columns for Revenue, Expenses, and Net Assets. Rows include Contributions, Program service revenue, Membership dues, Interest on savings, Dividends, Gross rents, Other investment income, Sales of assets, Special events, Gross sales of inventory, Other revenue, Total revenue, Program services, Management and general, Fundraising, Payments to affiliates, Total expenses, Excess or deficit, Net assets at beginning, Other changes, Net assets at end.

**Part II Statement of Functional Expenses**

All organizations must complete column (A) Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others (See the instructions)

<i>Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.</i>		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
<b>22</b>	Grants and allocations (attach schedule) <input type="checkbox"/> (cash \$ <u>590,664</u> noncash \$ <u>1,000</u> ) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>22</b> 591,664	591,664		
<b>23</b>	Specific assistance to individuals (attach schedule)	<b>23</b>			
<b>24</b>	Benefits paid to or for members (attach schedule)	<b>24</b>			
<b>25</b>	Compensation of officers, directors, etc . . . . .	<b>25</b> 620,434		620,434	
<b>26</b>	Other salaries and wages . . . . .	<b>26</b> 14,850,290	12,914,550	1,452,696	483,044
<b>27</b>	Pension plan contributions . . . . .	<b>27</b> 1,313,150	1,218,706	48,861	45,583
<b>28</b>	Other employee benefits . . . . .	<b>28</b> 2,486,818	2,039,957	366,895	79,966
<b>29</b>	Payroll taxes . . . . .	<b>29</b> 1,173,316	1,004,510	134,993	33,813
<b>30</b>	Professional fundraising fees . . . . .	<b>30</b> 277,548			277,548
<b>31</b>	Accounting fees . . . . .	<b>31</b> 281,943	246,736	34,940	267
<b>32</b>	Legal fees . . . . .	<b>32</b> 250,449	107,974	141,861	614
<b>33</b>	Supplies . . . . .	<b>33</b> 2,346,860	2,242,764	102,598	1,498
<b>34</b>	Telephone . . . . .	<b>34</b> 356,343	332,195	23,880	268
<b>35</b>	Postage and shipping . . . . .	<b>35</b> 318,679	291,307	12,136	15,236
<b>36</b>	Occupancy . . . . .	<b>36</b> 1,892,659	1,628,024	262,264	2,371
<b>37</b>	Equipment rental and maintenance . . . . .	<b>37</b> 574,723	572,622	2,068	33
<b>38</b>	Printing and publications . . . . .	<b>38</b> 1,319,289	1,118,106	32,282	168,901
<b>39</b>	Travel . . . . .	<b>39</b> 1,081,961	880,210	123,630	78,121
<b>40</b>	Conferences, conventions, and meetings . . . . .	<b>40</b> 134,370	101,355	28,692	4,323
<b>41</b>	Interest . . . . .	<b>41</b>			
<b>42</b>	Depreciation, depletion, etc (attach schedule)	<b>42</b> 6,819,350	6,402,397	409,839	7,114
<b>43</b>	Other expenses not covered above (itemize)				
<b>a</b>	Advertising and promotions	<b>43a</b> 1,393,056	1,290,482	96,047	6,527
<b>b</b>	Furniture & fixtures	<b>43b</b> 262,035	233,904	7,774	20,357
<b>c</b>	Outside services	<b>43c</b> 2,714,035	2,538,619	128,952	46,464
<b>d</b>	Merchant fees	<b>43d</b> 411,475	361,406		50,069
<b>e</b>	Miscellaneous expenses	<b>43e</b> 26,357		26,357	
<b>f</b>		<b>43f</b>			
<b>g</b>		<b>43g</b>			
<b>44</b>	<b>Total functional expenses.</b> Add lines 22 through 43 (Organizations completing columns (B)-(D), carry these totals to lines 13-15)	<b>44</b> 41,496,804	36,117,488	4,057,199	1,322,117

**Joint Costs.** Check  if you are following SOP 98-2

Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services?  Yes  No

If "Yes," enter (i) the aggregate amount of these joint costs \$ \_\_\_\_\_, (ii) the amount allocated to Program services \$ \_\_\_\_\_, (iii) the amount allocated to Management and general \$ \_\_\_\_\_, and (iv) the amount allocated to Fundraising \$ \_\_\_\_\_

**Part III Statement of Program Service Accomplishments** (See the instructions.)

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization. How the public perceives an organization in such cases may be determined by the information presented on its return. Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

What is the organization's primary exempt purpose? ▶ See statement 19  All organizations must describe their exempt purpose achievements in a clear and concise manner. State the number of clients served, publications issued, etc. Discuss achievements that are not measurable. (Section 501(c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others.)	<b>Program Service Expenses</b> (Required for 501(c)(3) and (4) orgs, and 4947(a)(1) trusts, but optional for others.)
<b>a</b> See statements 20 and 21  (Grants and allocations \$ 591,664) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	36,117,488
<b>b</b>  (Grants and allocations \$ ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	
<b>c</b>  (Grants and allocations \$ ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	
<b>d</b>  (Grants and allocations \$ ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	
<b>e</b> Other program services (attach schedule) (Grants and allocations \$ ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	
<b>f Total of Program Service Expenses</b> (should equal line 44, column (B), Program services) . . . . ▶	36,117,488

**Part IV Balance Sheets** (See the instructions.)

**Note:** Where required, attached schedules and amounts within the description column should be for end-of-year amounts only.

		(A)		(B)
		Beginning of year		End of year
Assets	<b>45</b> Cash—non-interest-bearing . . . . .	218,640	<b>45</b>	278,560
	<b>46</b> Savings and temporary cash investments . . . . .	2,788,172	<b>46</b>	4,052,412
	<b>47a</b> Accounts receivable . . . . .	<b>47a</b> 1,788,025		
	<b>b</b> Less allowance for doubtful accounts . . . . .	<b>47b</b> 11,470	993,868	<b>47c</b> 1,776,555
	<b>48a</b> Pledges receivable . . . . .	<b>48a</b> 10,098,924		
	<b>b</b> Less allowance for doubtful accounts . . . . .	<b>48b</b>	11,747,751	<b>48c</b> 10,098,924
	<b>49</b> Grants receivable . . . . .	746,126	<b>49</b>	
	<b>50</b> Receivables from officers, directors, trustees, and key employees (attach schedule) . . . . .		<b>50</b>	
	<b>51a</b> Other notes and loans receivable (attach schedule) . . . . .	<b>51a</b>		
	<b>b</b> Less allowance for doubtful accounts . . . . .	<b>51b</b>		<b>51c</b>
	<b>52</b> Inventories for sale or use . . . . .		<b>52</b>	
	<b>53</b> Prepaid expenses and deferred charges . . . . .	567,857	<b>53</b>	588,908
	<b>54</b> Investments—securities (attach schedule) . . . . .	90,832,207	<b>54</b>	98,325,061
	<b>55a</b> Investments—land, buildings, and equipment basis . . . . .	<b>55a</b>		
	<b>b</b> Less accumulated depreciation (attach schedule) . . . . .	<b>55b</b>		<b>55c</b>
<b>56</b> Investments—other (attach schedule) . . . . .		<b>56</b>		
<b>57a</b> Land, buildings, and equipment basis . . . . .	<b>57a</b> 184,413,181			
<b>b</b> Less accumulated depreciation (attach schedule) . . . . .	<b>57b</b> 75,430,686	109,178,930	<b>57c</b> 108,982,495	
<b>58</b> Other assets (describe . . . . .)	1,848,334	<b>58</b>	1,392,870	
<b>59 Total assets</b> (must equal line 74) Add lines 45 through 58 . . . . .	218,921,885	<b>59</b>	225,495,785	
Liabilities	<b>60</b> Accounts payable and accrued expenses . . . . .	4,148,662	<b>60</b>	3,114,571
	<b>61</b> Grants payable . . . . .		<b>61</b>	
	<b>62</b> Deferred revenue . . . . .	4,606,466	<b>62</b>	4,800,596
	<b>63</b> Loans from officers, directors, trustees, and key employees (attach schedule) . . . . .		<b>63</b>	
	<b>64a</b> Tax-exempt bond liabilities (attach schedule) . . . . .		<b>64a</b>	
	<b>b</b> Mortgages and other notes payable (attach schedule) . . . . .		<b>64b</b>	
	<b>65</b> Other liabilities (describe . . . . .)	463,712	<b>65</b>	474,906
<b>66 Total liabilities</b> Add lines 60 through 65 . . . . .	9,218,840	<b>66</b>	8,390,073	
Net Assets or Fund Balances	<b>Organizations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> and complete lines 67 through 69 and lines 73 and 74			
	<b>67</b> Unrestricted . . . . .	189,651,500	<b>67</b>	199,607,423
	<b>68</b> Temporarily restricted . . . . .	13,978,580	<b>68</b>	11,298,539
	<b>69</b> Permanently restricted . . . . .	6,072,965	<b>69</b>	6,199,750
	<b>Organizations that do not follow SFAS 117, check here</b> <input type="checkbox"/> and complete lines 70 through 74			
	<b>70</b> Capital stock, trust principal, or current funds . . . . .		<b>70</b>	
	<b>71</b> Paid-in or capital surplus, or land, building, and equipment fund . . . . .		<b>71</b>	
	<b>72</b> Retained earnings, endowment, accumulated income, or other funds . . . . .		<b>72</b>	
<b>73 Total net assets or fund balances</b> (add lines 67 through 69 or lines 70 through 72, column (A) <b>must</b> equal line 19, column (B) <b>must</b> equal line 21) . . . . .	209,703,045	<b>73</b>	217,105,712	
<b>74 Total liabilities and net assets / fund balances</b> Add lines 66 and 73 . . . . .	218,921,885	<b>74</b>	225,495,785	

**Part IV-A Reconciliation of Revenue per Audited Financial Statements With Revenue per Return** (See the instructions.)

<b>a</b>	Total revenue, gains, and other support per audited financial statements . . . . .	<b>a</b>	49,665,000
<b>b</b>	Amounts included on line <b>a</b> but not on line 12		
<b>1</b>	Net unrealized gains on investments . . . . .	<b>b1</b>	2,013,484
<b>2</b>	Donated services and use of facilities . . . . .	<b>b2</b>	95,804
<b>3</b>	Recoveries of prior year grants . . . . .	<b>b3</b>	
<b>4</b>	Other (specify) <input type="checkbox"/> _____	<b>b4</b>	2,046,501
	Add lines <b>b1</b> through <b>b4</b> . . . . .	<b>b</b>	4,155,789
<b>c</b>	Subtract line <b>b</b> from line <b>a</b> . . . . .	<b>c</b>	45,509,211
<b>d</b>	Amounts included on line 12, but not on line <b>a</b>		
<b>1</b>	Investment expenses not included on line 6b . . . . .	<b>d1</b>	9,578
<b>2</b>	Other (specify) <input type="checkbox"/> _____	<b>d2</b>	1,366,060
	Add lines <b>d1</b> and <b>d2</b> . . . . .	<b>d</b>	4,155,789
<b>e</b>	<b>Total revenue</b> (line 12) Add lines <b>c</b> and <b>d</b> . . . . .	<b>e</b>	46,884,849

**Part IV-B Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

<b>a</b>	Total expenses and losses per audited financial statements . . . . .	<b>a</b>	41,598,000
<b>b</b>	Amounts included on line <b>a</b> but not on line 17		
<b>1</b>	Donated services and use of facilities . . . . .	<b>b1</b>	95,804
<b>2</b>	Prior year adjustments reported on line 20 . . . . .	<b>b2</b>	
<b>3</b>	Losses reported on line 20 . . . . .	<b>b3</b>	
<b>4</b>	Other (specify) <input type="checkbox"/> _____	<b>b4</b>	496,957
	Add lines <b>b1</b> through <b>b4</b> . . . . .	<b>b</b>	592,761
<b>c</b>	Subtract line <b>b</b> from line <b>a</b> . . . . .	<b>c</b>	41,005,239
<b>d</b>	Amounts included on line 17, but not on line <b>a</b> :		
<b>1</b>	Investment expenses not included on line 6b . . . . .	<b>d1</b>	9,578
<b>2</b>	Other (specify) <input type="checkbox"/> _____	<b>d2</b>	481,987
	Add lines <b>d1</b> and <b>d2</b> . . . . .	<b>d</b>	491,565
<b>e</b>	<b>Total expenses</b> (line 17) Add lines <b>c</b> and <b>d</b> . . . . .	<b>e</b>	41,496,804

**Part V-A Current Officers, Directors, Trustees, and Key Employees** (List each person who was an officer, director, trustee, or key employee at any time during the year even if they were not compensated.) (See 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 plans	(E) Expense account and other allowances
See Additional Data Table				



**Part VI Other Information** (continued)

	Yes	No
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<b>82a</b> Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?	<b>82a</b>	Yes	
<b>b</b> If "Yes," you may indicate the value of these items here. Do not include this amount as revenue in Part I or as an expense in Part II. (See instructions in Part III)	<b>82b</b>		
<b>83a</b> Did the organization comply with the public inspection requirements for returns and exemption applications?	<b>83a</b>	Yes	
<b>b</b> Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	<b>83b</b>	Yes	
<b>84a</b> Did the organization solicit any contributions or gifts that were not tax deductible?	<b>84a</b>		No
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>84b</b>		
<b>85 501(c)(4), (5), or (6) organizations. a</b> Were substantially all dues nondeductible by members?	<b>85a</b>		
<b>b</b> Did the organization make only in-house lobbying expenditures of \$2,000 or less? If "Yes," was answered to either 85a or 85b, <b>do not</b> complete 85c through 85h below unless the organization received a waiver for proxy tax owed the prior year	<b>85b</b>		
<b>c</b> Dues assessments, and similar amounts from members	<b>85c</b>		
<b>d</b> Section 162(e) lobbying and political expenditures	<b>85d</b>		
<b>e</b> Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices	<b>85e</b>		
<b>f</b> Taxable amount of lobbying and political expenditures (line 85d less 85e)	<b>85f</b>		
<b>g</b> Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?	<b>85g</b>		
<b>h</b> If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?	<b>85h</b>		
<b>86 501(c)(7) orgs.</b> Enter <b>a</b> Initiation fees and capital contributions included on line 12	<b>86a</b>		
<b>b</b> Gross receipts, included on line 12, for public use of club facilities	<b>86b</b>		
<b>87 501(c)(12) orgs.</b> Enter <b>a</b> Gross income from members or shareholders	<b>87a</b>		
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	<b>87b</b>		
<b>88</b> At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Part IX	<b>88</b>		No
<b>89a 501(c)(3) organizations</b> Enter Amount of tax imposed on the organization during the year under section 4911, section 4912, section 4955			
<b>b 501(c)(3) and 501(c)(4) orgs.</b> 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 a statement explaining each transaction	<b>89b</b>		No
<b>c</b> Enter Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958			
<b>d</b> Enter Amount of tax on line 89c, above, reimbursed by the organization			
<b>90a</b> List the states with which a copy of this return is filed <b>CA</b>			
<b>b</b> Number of employees employed in the pay period that includes March 12, 2005 (See instructions)	<b>90b</b>	378	
<b>91a</b> The books are in care of <b>E Prohaska</b> Telephone no <b>(831) 648-4808</b> 886 Cannery Row Located at <b>Monterey, CA</b> ZIP + 4 <b>93940</b>			
<b>b</b> At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>91b</b>	Yes	No
If "Yes," enter the name of the foreign country See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1</b> , Report of Foreign Bank and Financial Accounts			
<b>c</b> At any time during the calendar year, did the organization maintain an office outside of the United States?	<b>91c</b>		No
If "Yes," enter the name of the foreign country			
<b>92 Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of Form 1041</b> —Check here and enter the amount of tax-exempt interest received or accrued during the tax year	<b>92</b>		

**Part VII Analysis of Income-Producing Activities** (See the instructions.)

**Note:** Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
<b>93</b> Program service revenue					
<b>a</b> Admission fees					22,062,525
<b>b</b> Guided tours					26,195
<b>c</b> Member events					134,961
<b>d</b> Other program revenue					525,770
<b>e</b>					
<b>f</b> Medicare/Medicaid payments . . . . .					
<b>g</b> Fees and contracts from government agencies					
<b>94</b> Membership dues and assessments . . . . .					6,477,782
<b>95</b> Interest on savings and temporary cash investments					
<b>96</b> Dividends and interest from securities . . . . .			14	3,328,390	
<b>97</b> Net rental income or (loss) from real estate					
<b>a</b> debt-financed property . . . . .					
<b>b</b> non debt-financed property . . . . .			16	2,381,614	
<b>98</b> Net rental income or (loss) from personal property			16	125,348	
<b>99</b> Other investment income . . . . .					
<b>100</b> Gain or (loss) from sales of assets other than inventory			18	-82,280	
<b>101</b> Net income or (loss) from special events . . . . .			01	39,089	
<b>102</b> Gross profit or (loss) from sales of inventory					
<b>103</b> Other revenue <b>a</b> <u>Food services</u>			03	870,721	
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>104</b> Subtotal (add columns (B), (D), and (E)) . . . . .				6,662,882	29,227,233
<b>105</b> Total (add line 104, columns (B), (D), and (E)) . . . . .					35,890,115

**Note:** Line 105 plus line 1d, Part I, should equal the amount on line 12, Part I.

**Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes** (See the instructions.)

Line No.	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes)
	See Additional Data Table

**Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities** (See the instructions.)

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
	%			
	%			
	%			
	%			

**Part X Information Regarding Transfers Associated with Personal Benefit Contracts** (See the instructions.)

- (a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No
- (b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No

**NOTE:** If "Yes" to (b), file Form 8870 and Form 4720 (see instructions).

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 Sign Here**

Signature of officer: \_\_\_\_\_ Date: 2006-11-06

Edward E Prohaska CFO  
Type or print name and title

**Paid Preparer's Use Only**

Preparer's signature: \_\_\_\_\_ Date: \_\_\_\_\_ Check if self-employed:

Firm's name (or yours if self-employed), address, and ZIP + 4: Deloitte Tax LLP  
50 Fremont Street  
San Francisco, CA 94105

Preparer's SSN or PTIN (See Gen Inst W): \_\_\_\_\_  
EIN: \_\_\_\_\_  
Phone no: (415) 783-4000

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

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

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

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

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

OMB No 1545-0047

**2005**

Department of the  
Treasury  
Internal Revenue  
Service

Name of the organization  
Monterey Bay Aquarium Foundation

**Employer identification number**

94-2487469

**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
George Michael Sutton 886 Cannery Row Monterey, CA 93940	VP-CFFO 40 00	126,006	24,236	155
Cristina Fekeci 886 Cannery Row Monterey, CA 96940	CHIEF Dev Off 40 00	121,989	37,070	263
Claire Sherwood 886 Cannery Row Monterey, CA 93940	VP-SalesMktg 40 00	111,612	30,434	135
Don Hughes 886 Cannery Row Monterey, CA 93940	VP-Exhibits 40 00	106,552	37,183	635
Teresa Merry 886 Cannery Row Monterey, CA 93940	VP-HR 40 00	99,213	33,872	124
Total number of other employees paid over \$50,000 ▶	106			

**Part II-A Compensation of the Five Highest Paid Independent Contractors for Professional Services**  
(See page 2 of the instructions. List each one (whether individual 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
NPO Direct Marketing Inc 3212 Nebraska Avenue Santa Monica, CA 90404	Telemarketing servic	248,656
Curiale Dellaverson 727 Sansome St San Francisco, CA 94111	Legal services	157,237
Deloitte Touche 50 Fremont St San Francisco, CA 94105	Audit services	121,668
Charles R Feldstein Co 737 N Michigan Ave Chicago, IL 60611	Fundraising consulti	115,000
Willis Insurance Services Department 100485 Pasadena, CA 91189	Insurance consulting	100,000
Total number of others receiving over \$50,000 for professional services ▶	2	

**Part II-B Compensation of the Five Highest Paid Independent Contractors for Other Services**  
(List each contractor who performed services other than professional services, whether individual or firms. If there are none, enter "None". See page X for instructions.)

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
Stocker Allaire Inc 21 Mandeville Court Monterey, CA 93940	Building contractor	5,106,776
Buder Engel Friends 128 King Street San FRANCISCO, CA 94107	Marketing consultant	982,127
Cemrock Landscapes Inc 4790 South Julian Ave Tucson, AZ 85714	Building contractor	503,231
Headquarters Advertising Inc 888 Brannan Street San Francisco, CA 94103	Marketing consultant	421,679
Blanchette Press	Printing services	270,850
Total number of other contractors receiving over \$50,000 for other services ▶	43	

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

Yes No

<b>1</b>	During the year, has the organization attempted to influence national, state, or local legislation, include 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 <b>▶</b> \$ <u>6,354</u> (Must equal amounts on line 38, Part VI-A, or line 1 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	<b>1</b>	Yes	
<b>2</b>	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.)			
<b>a</b>	Sale, exchange, or leasing property?	<b>2a</b>		No
<b>b</b>	Lending of money or other extension of credit?	<b>2b</b>		No
<b>c</b>	Furnishing of goods, services, or facilities?	<b>2c</b>	Yes	
<b>d</b>	Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)?	<b>2d</b>	Yes	
<b>e</b>	Transfer of any part of its income or assets?	<b>2e</b>		No
<b>3a</b>	Do you make grants for scholarships, fellowships, student loans, etc ? (If "Yes," attach an explanation of how you determine that recipients qualify to receive payments )	<b>3a</b>		No
<b>b</b>	Do you have a section 403(b) annuity plan for your employees?	<b>3b</b>	Yes	
<b>c</b>	During the year, did the organization receive a contribution of qualified real property interest under section 170(h)?	<b>3c</b>		No
<b>4a</b>	Did you maintain any separate account for participating donors where donors have the right to provide advice on the use or distribution of funds?	<b>4a</b>		No
<b>b</b>	Do you provide credit counseling, debt management, credit repair, or debt negotiation services?	<b>4b</b>		No

**Part IV Reason for Non-Private Foundation Status** (See pages 3 through 6 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)(vi) (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)** sections 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2) Check the box that describes the type of supporting organization  Type 1  Type 2  Type 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) 2004	(b) 2003	(c) 2002	(d) 2001	(e) Total
<b>15</b> Gifts, grants, and contributions received (Do not include unusual grants See line 28 )	17,245,332	8,367,478	10,543,076	27,085,671	63,241,557
<b>16</b> Membership fees received	6,090,455	5,034,939	4,920,017	4,811,825	20,857,236
<b>17</b> 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	25,517,738	26,125,506	27,399,943	26,873,695	105,916,882
<b>18</b> 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	5,030,189	2,870,959	2,322,847	3,126,081	13,350,076
<b>19</b> Net income from unrelated business activities not included in line 18					0
<b>20</b> Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					0
<b>21</b> 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
<b>22</b> Other income Attach a schedule Do not include gain or (loss) from sale of capital assets	530,698	456,347	760,533	720,794	2,468,372
<b>23</b> Total of lines 15 through 22	54,414,412	42,855,229	45,946,416	62,618,066	205,834,123
<b>24</b> Line 23 minus line 17	28,896,674	16,729,723	18,546,473	35,744,371	99,917,241
<b>25</b> Enter 1% of line 23	544,144	428,552	459,464	626,181	
<b>26 Organizations described on lines 10 or 11:</b> <b>a</b> Enter 2% of amount in column (e), line 24					<b>26a</b>
<b>b</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 2001 through 2004 exceeded the amount shown in line 26a <b>Do not file this list with your return.</b> Enter the total of all these excess amounts					<b>26b</b> 0
<b>c</b> Total support for section 509(a)(1) test Enter line 24, column (e)					<b>26c</b>
<b>d</b> Add Amounts from column (e) for lines 18 _____ 19 _____ 22 _____ 26b _____					<b>26d</b>
<b>e</b> Public support (line 26c minus line 26d total)					<b>26e</b>
<b>f</b> <b>Public support percentage (line 26e (numerator) divided by line 26c (denominator))</b>					<b>26f</b>
<b>27 Organizations described on line 12:</b> <b>a</b> 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 " <b>Do not file this list with your return.</b> Enter the sum of such amounts for each year (2004) <u>2,809,085</u> (2003) <u>706,886</u> (2002) <u>4,789,535</u> (2001) <u>21,457,952</u>					
<b>b</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 <b>larger</b> of <b>(1)</b> the amount on line 25 for the year or <b>(2)</b> \$5,000 (Include in the list organizations described in lines 5 through 11, as well as individuals ) <b>Do not file this list with your return.</b> After computing the difference between the amount received and the larger amount described in <b>(1)</b> or <b>(2)</b> , enter the sum of these differences (the excess amounts) for each year (2004) _____ (2003) _____ (2002) _____ (2001) _____					
<b>c</b> Add Amounts from column (e) for lines 15 _____ 63,241,557 16 _____ 20,857,236 17 _____ 105,916,882 20 _____ 0 21 _____ 0					<b>27c</b> 190,015,675
<b>d</b> Add Line 27a total _____ 29,763,458 and line 27b total _____					<b>27d</b> 29,763,458
<b>e</b> Public support (line 27c total minus line 27d total)					<b>27e</b> 160,252,217
<b>f</b> Total support for section 509(a)(2) test Enter amount from line 23, column (e) <b>27f</b> 205,834,123					
<b>g</b> <b>Public support percentage (line 27e (numerator) divided by line 27f (denominator))</b>					<b>27g</b> 77.85 50 %
<b>h</b> <b>Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))</b>					<b>27h</b> 64.8 58 %
<b>28 Unusual Grants:</b> For an organization described in line 10, 11, or 12 that received any unusual grants during 2001 through 2004, 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 <b>Do not file this list with your return.</b> 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)**

	Yes	No
<b>29</b> 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?	<b>29</b>	
<b>30</b> 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?	<b>30</b>	
<b>31</b> 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? If "Yes," please describe, if "No," please explain (If you need more space, attach a separate statement )	<b>31</b>	
<hr/>		
<hr/>		
<hr/>		
<b>32</b> Does the organization maintain the following	<b>32a</b>	
<b>a</b> Records indicating the racial composition of the student body, faculty, and administrative staff?	<b>32a</b>	
<b>b</b> Records documenting that scholarships and other financial assistance are awarded on racially nondiscriminatory basis?	<b>32b</b>	
<b>c</b> Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	<b>32c</b>	
<b>d</b> Copies of all material used by the organization or on its behalf to solicit contributions?	<b>32d</b>	
If you answered "No" to any of the above, please explain (If you need more space, attach a separate statement )		
<hr/>		
<hr/>		
<b>33</b> Does the organization discriminate by race in any way with respect to		
<b>a</b> Students' rights or privileges?	<b>33a</b>	
<b>b</b> Admissions policies?	<b>33b</b>	
<b>c</b> Employment of faculty or administrative staff?	<b>33c</b>	
<b>d</b> Scholarships or other financial assistance?	<b>33d</b>	
<b>e</b> Educational policies?	<b>33e</b>	
<b>f</b> Use of facilities?	<b>33f</b>	
<b>g</b> Athletic programs?	<b>33g</b>	
<b>h</b> Other extracurricular activities?	<b>33h</b>	
If you answered "Yes" to any of the above, please explain (If you need more space, attach a separate statement )		
<hr/>		
<hr/>		
<b>34a</b> Does the organization receive any financial aid or assistance from a governmental agency?	<b>34a</b>	
<b>b</b> Has the organization's right to such aid ever been revoked or suspended? If you answered "Yes" to either 34a or b, please explain using an attached statement	<b>34b</b>	
<b>35</b> 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	<b>35</b>	

**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>		<b>(a)</b> Affiliated group totals	<b>(b)</b> To be completed for ALL electing organizations												
(The term "expenditures" means amounts paid or incurred )															
<b>36</b>	Total lobbying expenditures to influence public opinion (grassroots lobbying)	<b>36</b>	0												
<b>37</b>	Total lobbying expenditures to influence a legislative body (direct lobbying)	<b>37</b>	6,354												
<b>38</b>	Total lobbying expenditures (add lines 36 and 37)	<b>38</b>	6,354												
<b>39</b>	Other exempt purpose expenditures	<b>39</b>	42,793,949												
<b>40</b>	Total exempt purpose expenditures (add lines 38 and 39)	<b>40</b>	42,800,303												
<b>41</b>	Lobbying nontaxable amount Enter the amount from the following table— <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><b>If the amount on line 40 is—</b></td> <td style="width: 50%;"><b>The lobbying nontaxable amount is—</b></td> </tr> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 40</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000</td> </tr> </table>	<b>If the amount on line 40 is—</b>	<b>The lobbying nontaxable amount is—</b>	Not over \$500,000	20% of the amount on line 40	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000	<b>41</b>	1,000,000
<b>If the amount on line 40 is—</b>	<b>The lobbying nontaxable amount is—</b>														
Not over \$500,000	20% of the amount on line 40														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
<b>42</b>	Grassroots nontaxable amount (enter 25% of line 41)	<b>42</b>	250,000												
<b>43</b>	Subtract line 42 from line 36 Enter -0- if line 42 is more than line 36	<b>43</b>	0												
<b>44</b>	Subtract line 41 from line 38 Enter -0- if line 41 is more than line 38	<b>44</b>	0												

**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) 2005	(b) 2004	(c) 2003	(d) 2002	(e) Total
<b>45</b> Lobbying nontaxable amount	1,000,000	1,000,000	0	0	2,000,000
<b>46</b> Lobbying ceiling amount (150% of line 45(e))					3,000,000
<b>47</b> Total lobbying expenditures	6,354	0	0	0	6,354
<b>48</b> Grassroots nontaxable amount	250,000	250,000	0	0	500,000
<b>49</b> Grassroots ceiling amount (150% of line 48(e))					750,000
<b>50</b> Grassroots lobbying expenditures	0	0	0	0	0

**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
<b>a</b> Volunteers		No	
<b>b</b> Paid staff or management (Include compensation in expenses reported on lines c through h.)		No	
<b>c</b> Media advertisements			
<b>d</b> Mailings to members, legislators, or the public			
<b>e</b> Publications, or published or broadcast statements			
<b>f</b> Grants to other organizations for lobbying purposes			
<b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body			
<b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means			
<b>i</b> 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



## TY 2005 Cash Grants Paid Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

<b>Class of Activity</b>	<b>Recipient's name</b>	<b>Address</b>	<b>Amount</b>	<b>Relationship</b>
White Shark Research	Stanford University	651 Serra St 260 Stanford, CA 94305	352,898	None
Pelagic Field Research	Stanford University	651 Serra St 260 Stanford, CA 94305	160,458	None
Policy Development	Carolyn Steve-Sotka	1717 Battalion Dr Charlston, SC 29412	30,458	None
Ocean & Diver Safety	Pacific Grove Ocean Rescue	600 Pine Ave Pacific Grove, CA 93950	500	None
Hurricane Katrina Relief	Lincoln Park Zoological Society-Hurricane Katrina Relief	PO Box 14903 Chicago, IL 60614	35,000	None
Policy Development	Adina T Abeles	752 Lottie St Monterey, CA 93940	11,350	None

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

## TY 2005 Gain/Loss from Sale of Other Assets Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Sales Expenses	Total (net)	Accumulated Depreciation
Loss on disposal of fixed assets	2005-06	PURCHASED	2005-06		19,375	295,928	0	-78,036	198,517

**TY 2005 Gain/Loss from Sale of Public Securities Schedule****Name:** Monterey Bay Aquarium Foundation**EIN:** 94-2487469**Gross Sales Price:** 3,071,112**Basis:** 3,075,356**Sales Expenses:** 0**Total (net):** -4,244

## TY 2005 General Explanation Attachment

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Identifier	Return Reference	Explanation
		<p>Statement of organization's primary exempt purpose The mission of the Monterey Bay Aquarium is to inspire conservation of the oceans First and foremost, we inspire our visitors with engaging exhibits and programs focused on encounters with living creatures and their habitats In 2005, we attracted nearly 1.9 million visitors with experiences designed to establish the intellectual and emotional connections to the natural world that are essential to caring about the oceans and the life in them Today, our mission is more urgent than ever Worldwide, the oceans are in peril, their wildlife and habitats threatened by the ever-increasing pace of human activity We risk losing vital natural systems that sustain us all We believe humankind can turn this tide, arrest these damaging trends and eventually restore our fisheries and ocean habitats if people everywhere adopt an ethic of value, stewardship and action on behalf of the oceans We are committed to building this constituency and inspiring action for ocean conservation</p>

Identifier	Return Reference	Explanation
		<p>Statement of exempt purpose achievements The 2005 unveiling of Ocean's Edge Coastal Habitats of Monterey Bay marked the culmination of a three-year campaign to update and modernize the aquarium's original galleries Visitors can walk-through a wave crash tunnel to feel the intense power of waves, visit the Real-Cost Cafe- to learn about sustainable seafood choices with interactive video, peer into an octopus' den, and walk within arm's length of coastal birds in an aviary and wetlands exhibit The dynamic exhibits reconnect visitors with the oceans, demonstrate the consequences of everyday actions and deepen appreciation towards this natural wonder The \$11 million project was made possible by support from generous donors to our 20th Anniversary Fund Live exhibits are the vehicle through which we inspire a love of the oceans in our visitors In 2005, we had a lot to offer We became the first aquarium in the world to place a white shark on long-term exhibit (2004-2005) when we introduced a young female into our Outer Bay exhibit in September 2004 She attracted international attention, gave us an unprecedented opportunity to learn about the life of the most renowned top predator in the ocean, and change public attitudes toward white sharks By the time of her release in March 2005, she set records as the first white shark to survive more than 16 days at an aquarium, and the first to consistently take food offered by aquarium staff (Note We successfully returned the white shark to the wild on March 31, 2005, after a record 65 months at the aquarium She was first fitted with a 30-day electronic tracking tag which, when it popped free, revealed that she had traveled more than 200 miles south, as much as 100 miles offshore and to depths of 800 feet and deeper ) This was also a year of family reunions Hurricane Katrina's destruction throughout New Orleans left several of the Audubon Aquarium of the Americas inhabitants in need of temporary housing Fifteen resident birds in Splash Zone welcomed 19 rescued birds from the New Orleans aquarium, several of whom are related to ours The Monterey Bay Aquarium's permanent colony of blackfooted penguins came from New Orleans in 2000 Additionally, two southern sea otters that were originally rescued and rehabilitated as pups in our Sea Otter Research and Conservation program and sent to the Aquarium of the Americas, made their way back to the aquarium until their Southern home was rebuilt As California grows and demographics change, we continue to reach out to Hispanic residents In 2005, we attracted a higher percentage of Hispanic visitors than ever before Annual family events such as "Dia del Nino" and "Dia de la Familia", and incorporation of bilingual presentations, exhibit signs and interpreters to our exhibits, bring conservation messages to Spanish-speaking visitors Additionally the Seafood Watch team produced a West coast Spanish-language pocket guide in response to California's Hispanic residents concerns about over fishing and its effects on the environment To date, more than 30,000 guides have been distributed Our effectiveness in reaching and motivating visitors is dramatically increased thanks to the dedication and effort of a volunteer corps that now exceeds 900 individuals Volunteers, work throughout the year with diverse audiences interpreting marine life and delivering education programs They provided nearly 140,000 hours of dedicated service during 2005</p>

Identifier	Return Reference	Explanation
		<p>Statement of exempt purpose achievements (continued) We continue to offer free-admission programs for low - income residents of the community Our "Free to Learn" program (offering free admission for young people and adults through local health and human service agencies), "Shelf to Shore" (free admission through selected area libraries in low -income neighborhoods), our community open house "Free Week" in December and other free admission programs attracted nearly 120,000 local residents We are committed to inspiring the next generation of ocean stew ards through innovative science based programs for children, teachers and parents in schools and informally in our exhibit galleries and focus on instilling an ocean conservation ethic In 2005, we brought more than 80,000 schoolchildren, teachers and adult chaperones to the aquarium - at no charge to these groups Since we opened in 1984, we have hosted more than 1 6 million schoolchildren through these programs Using the Splash Zone and Sharks Myth and Mystery exhibits as classrooms, we created new education programs that have now reached more than 12,000 low -income preschoolers and their families through Head Start centers We reach thousands of other students and educators each year through other classroom programs, guided and self-guided tours, and through outreach initiatives to young people and science educators Each program is based on the premise that learning, especially for young children, is not so much about right or w rong answers, but about exploration and discovery The cumulative effect is dedication to science and the beginning of a lifelong connection with the oceans and marine life We also formed a new education partnership with the Watsonville community The Mar y Campo Partners in Conservation initiative will launch in 2006 with a special project for high school students and their families The comprehensive program takes an integrative approach to conservation education through a long-term collaboration with the new Pajaro Valley High School The program will create opportunities for children and their families to be stew ards of the land, coastline and Monterey Bay through community projects and established relationships with the school, community and aquarium In 2005, our web site (<a href="http://www.montereybayaquarium.org">www.montereybayaquarium.org</a>) provided a significant educational resource for audiences beyond our walls with nearly 7 million online visitors- a 30 % increase compared to 2004 The web site won the 2005 Webby People's Voice Award in the Education category The Award is the leading international award honoring excellence in web site design, creativity, usability and functionality Both on our web site and in the aquarium, we provide information and experiences that empower our visitors to move beyond caring about the oceans to caring for the oceans We identify relevant and timely conservation issues, take positions, and communicate these positions to the public and, when appropriate, policy makers Our Center for the Future for the Oceans, directed by Michael Sutton, supports efforts to create a network of marine protected areas off the California coast, to reform ocean policy and management at the federal level and otherwise work to assure a future with healthy oceans, at a time when action is urgently needed We support conservation and research efforts to benefit the wild relatives of the species in our care and their habitats Our Seafood Watch program puts pocket guides to sustainable seafood in the hands of consumers, restaurateurs and seafood retailers - more than 5 million to date In 2005 alone, 2 2 million Seafood Watch pocket guides were distributed, including new regional guides for the Northeast and Hawaii and a Spanish-language West Coast pocket guide We completed our suite of regional guides so we now offer printed and online guides to seafood found in every area of the United States Information on the program and guides will be sent internationally via CD in 2006 We also expanded our efforts to change restaurant and retail seafood buying practices, and added new partner organizations across the country that are distributing Seafood Watch pocket guides Our sea otter research program continued to focus on efforts that will ensure the long-term survival of California's threatened sea otter population And, our Tuna Research and Conservation Center scientists continued their tagging efforts in the Atlantic and Pacific, shedding light on the life cycles of tunas, white sharks and other open-ocean species Taken together, our exhibits, education programs and conservation research are essential to achieving the future expressed in our vision statement-a world in which the oceans are healthy and people are committed to protecting the integrity of Earth's natural systems, which sustain us all</p>

Identifier	Return Reference	Explanation
		Statement to Form 990, Part V-A In 2005, the Foundation paid the premium of \$46,475 on directors and officers insurance treated as nontaxable fringe benefit

Identifier	Return Reference	Explanation
		Statement to Schedule A, Part VI-A The year 2004 was the first year the lobbying election under IRC Section 501 (h) was effective. The organization had no lobbying expenditures in 2004 and \$6,354 in 2005.

**TY 2005 Investments - Securities Schedule****Name:** Monterey Bay Aquarium Foundation**EIN:** 94-2487469

<b>Description</b>	<b>Book Value</b>	<b>Cost/FMV</b>
Money market funds	220,061	F
Fixed income funds	27,453,000	F
Equity funds	70,652,000	F

**TY 2005 Land etc. Schedule**

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

<b>Category/Item</b>	<b>Cost/Other Basis</b>	<b>Accumulated Depreciation</b>	<b>Book Value</b>
Land	8,850,284		8,850,284
Land Improvements	756,385	479,031	277,354
Buildings	121,413,636	42,197,016	79,216,620
Exhibits	33,094,930	17,088,766	16,006,164
Equipment	19,644,821	15,665,873	3,978,948
Construction-in-progress	653,125		653,125

## TY 2005 Non Cash Grants Paid Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

<b>Item No.</b>	1
<b>Class of Activity</b>	Education
<b>Donee's Name</b>	Community Access Ticket Services
<b>Donee's Address</b>	965 Mission St 240 San Francisco, CA 94103
<b>Amount (FMV)</b>	1000
<b>Relationship</b>	None
<b>Description</b>	Admission Tickets
<b>Book Value</b>	
<b>How Book Value is Determined?</b>	Current Market Price
<b>How FMV is Determined?</b>	
<b>Date of Gift</b>	2004-06

## TY 2005 Officer Compensation Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

### Julie Packard

	Compensation	EE Benefit Plans	Expense Acct
Program Services			
Mgmt & General	179,018	26,477	369
Fundraising			

**James Hekkers**

	<b>Compensation</b>	<b>EE Benefit Plans</b>	<b>Expense Acct</b>
<b>Program Services</b>			
<b>Mgmt &amp; General</b>	206,314	27,507	834
<b>Fundraising</b>			

**Edward E Prohaska**

	<b>Compensation</b>	<b>EE Benefit Plans</b>	<b>Expense Acct</b>
<b>Program Services</b>			
<b>Mgmt &amp; General</b>	145,484	34,241	190
<b>Fundraising</b>			

**TY 2005 Other Assets Schedule****Name:** Monterey Bay Aquarium Foundation**EIN:** 94-2487469

<b>Description</b>	<b>Beginning of Year Amount</b>	<b>End of Year Amount</b>
Intercompany receivable	417,759	104,139
Beneficial interest in split-interest agreements	1,430,575	1,288,731

## TY 2005 Other Changes in Net Assets Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Description	Amount
Unrealized gain on investments	2,013,484
Rounding	1,138

**TY 2005 Other Expenses Included Schedule**

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Description	Amount
Commercial Property Rental Expense	7,938
Loss on fixed assets disposal	78,036
Private Events Rental Expense	410,983

**TY 2005 Other Expenses  
Not Included Schedule****Name:** Monterey Bay Aquarium Foundation**EIN:** 94-2487469

<b>Description</b>	<b>Amount</b>
Merchandising expense reclass	4,876
Food service expense reclass	476,985
Rounding	126

## TY 2005 Other Liabilities Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Description	Beginning of Year Amount	End of Year Amount
Gift annuity liability	463,712	474,906

**TY 2005 Other Revenues Included Schedule****Name:** Monterey Bay Aquarium Foundation**EIN:** 94-2487469

<b>Description</b>	<b>Amount</b>
Loss on disposal of fixed assets	78,036
Commercial Property Rental Expense	7,938
Merchandising Operations Rental Expense	884,579
Net revenue of subsidiary	664,966
Private Events Rental Expense	410,982

**TY 2005 Other Revenues  
Not Included Schedule**

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Description	Amount
Food service expense reclass	476,985
Rounding	-380
Merchandising expense reclass	889,455

## TY 2005 Special Events Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Event Name	Gross Receipts	Contributions	Gross Revenue	Direct Expense	Net Income (Loss)
Hallow een Dance Party	43,020	0	43,020	14,225	28,795
Silver Fishes & New Years Wishes	79,425	0	79,425	68,835	10,590
Love at the Aquarium	16,045	0	16,045	19,009	-2,964
Jazz Club at the Aquarium	54,815	0	54,815	52,147	2,668

## TY 2005 Other Income Schedule

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Description	2003	2002	2001	2000	Total
Reimbursement			50,533		50,533
Food services	530,698	456,347	710,000	720,794	2,417,839

## TY 2005 Self Dealing Statement

**Name:** Monterey Bay Aquarium Foundation

**EIN:** 94-2487469

Line Number	Explanation
2c	<p>Stephen Neal, a member of the law firm of Cooley Godward LLP, is a member of the Aquarium's Board of Trustees. Certain members of the firm provided various pro bono legal services to the Aquarium. Gordon Smith, President and Chief Executive Officer of Pacific Gas and Electric Company, is a member of the Aquarium's Board of Trustees. The Aquarium purchased electricity and gas utilities from Pacific Gas and Electric at tariffed rates approved by the California Public Utilities Commission during the year, totaling \$1,252,613. Barbara P. Wright is the Aquarium's Secretary and Legal Counsel. She provides legal services to the Aquarium through the law firm of Finch, Montgomery, Wright &amp; Emmer, of which she is a partner. Fees for these services are paid to the firm and are for legal services, not for services in her capacity as an officer. Fees paid and expenses reimbursed to the firm in 2005 were \$16,667.</p>

**Additional Data****Software ID:****Software Version:****EIN:** 94-2487469**Name:** Monterey Bay Aquarium Foundation**Form 990, Part V-A - Current Officers, Directors, Trustees, and Key Employees:**

<b>(A) Name and address</b>	<b>(B) Title and average hours per week devoted to position</b>	<b>(C) Compensation (If not paid, enter -0-.)</b>	<b>(D) Contributions to employee benefit plans &amp; deferred compensation plans</b>	<b>(E) Expense account and other allowances</b>
Julie Packard 886 Cannery Row Monterey, CA 93940	Executive Director 28 00	179,018	26,477	369
Peter S Bing MD 886 Cannery Row Monterey, CA 93940	Chairman 1 00	0	0	0
Roberta Buffet Bialek 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Susan Ford Dorsey 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Jane Lubchenko PHD 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Marcia McNutt PHD 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Basil Mills 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Stephen C Neal 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Susan Orr 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
James E Canales 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0

**Form 990, Part V-A - Current Officers, Directors, Trustees, and Key Employees:**

<b>(A) Name and address</b>	<b>(B) Title and average hours per week devoted to position</b>	<b>(C) Compensation (If not paid, enter -0-.)</b>	<b>(D) Contributions to employee benefit plans &amp; deferred compensation plans</b>	<b>(E) Expense account and other allowances</b>
Margaret Rogers 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
George P Schultz 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Diane K Siri 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Gordon R Smith 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Jane Steel 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
The Honorable Lydia M Villarreal 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Nancy Burnett 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
The Honorable Leon E Panetta 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
James Hekkers 886 Cannery Row Monterey, CA 93940	Exec Vice President 40 00	206,314	27,507	834
Edward E Prohaska 886 Cannery Row Monterey, CA 93940	CFO 40 00	145,484	34,241	190

**Form 990, Part V-A - Current Officers, Directors, Trustees, and Key Employees:**

<b>(A) Name and address</b>	<b>(B) Title and average hours per week devoted to position</b>	<b>(C) Compensation (If not paid, enter -0-.)</b>	<b>(D) Contributions to employee benefit plans &amp; deferred compensation plans</b>	<b>(E) Expense account and other allowances</b>
Pietro Parravano 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Mark Wan 886 Cannery Row Monterey, CA 93940	Trustee 1 00	0	0	0
Barbara Wright 886 Cannery Row Monterey, CA 93940	Secretary 1 00	0	0	0

**Form 990, Part VIII - Relationship of Activities to the Accomplishment of Exempt Purposes:**

<b>Line No.</b> ▼	<b>Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes).</b>
93A	Admissions revenue constitutes the single largest source of funding for the Aquarium. This revenue supports the cost of operating and maintaining the Aquarium, including the living exhibit galleries. The Aquarium is the primary vehicle for fulfilling our mission of inspiring conservation of the oceans by providing a first-hand experience with ocean life.
93B	Guided tours heighten the visitor's educational experience by providing interpretation of the Aquarium's exhibits, support functions, and research and conservation activities.
93C	Members events provide special opportunities to learn more about the Aquarium's conservation efforts, and include special educational programs, guest lectures, book signings, and cooking demonstrations on sustainable seafood.
93D	Symposium, workshop and education programs provide enriched learning experiences. These include our new Aquarium Adventures experiences, consisting of surface SCUBA sessions, a three-hour research excursion on a sailboat in the Monterey Bay, behind-the-scenes tours, and other special programs for families and children.
94	Members receive unlimited visitation to the Aquarium, and publications containing news and information about the Aquarium, its exhibits and research efforts, as well as other marine conservation information. This revenue provides important funding for operating and maintaining the Aquarium facilities, exhibits and programs.