

2005

Open to Public Inspection

990

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)

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

Form

Department of the Treasury Internal Revenue Service

A For the 2005 calendar year, or tax year beginning April 1, 2005, and ending March 31, 2006

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

29 IB 200603 03 15 3 0000 PALM BEACH COMMUNITY CHEST INC 44 COCOANUT RCW # 201 PALM BEACH FL 33480-4069

D Employer identification number 59 : 0637885 E Telephone number (561) 655-1919 F Accounting method: X Cash Accrual Other (specify)

G Website:

J Organization type (check only one) X 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 chooses to file a return, be sure to file a complete return. Some states require a complete return.

H and I are not applicable to section 527 organizations. H(a) Is this a group return for affiliates? Yes No X H(b) If "Yes," enter number of affiliates H(c) Are all affiliates included? Yes No H(d) Is this a separate return filed by an organization covered by a group ruling? Yes No X

I Group Exemption Number

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

L Gross receipts: Add lines 6b, 8b, 9b, and 10b to line 12

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

Table with 12 columns for revenue and 5 columns for expenses/net assets. Rows include: 1 Contributions, gifts, grants... 2 Program service revenue... 3 Membership dues... 4 Interest on savings... 5 Dividends... 6a Gross rents... 6b Less: rental expenses... 6c Net rental income... 7 Other investment income... 8a Gross amount from sales of assets... 8b Less: cost or other basis... 8c Gain or (loss)... 8d Net gain or (loss)... 9 Special events and activities... 9a Gross revenue... 9b Less: direct expenses... 9c Net income... 10a Gross sales of inventory... 10b Less: cost of goods sold... 10c Gross profit... 11 Other revenue... 12 Total revenue... 13 Program services... 14 Management and general... 15 Fundraising... 16 Payments to affiliates... 17 Total expenses... 18 Excess or (deficit)... 19 Net assets at beginning... 20 Other changes... 21 Net assets at end of year.

SCANNED AUG 17 2006

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G15 17

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.)

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22	Grants and allocations (attach schedule) (cash \$ _____ noncash \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	22 2,628,363	2,628,363		
23	Specific assistance to individuals (attach schedule)	23			
24	Benefits paid to or for members (attach schedule)	24			
25	Compensation of officers, directors, etc.	25			
26	Other salaries and wages	26 295,542	154,271	31,454	109,817
27	Pension plan contributions	27 54,441	27,032	5,632	21,777
28	Other employee benefits	28 26,535	13,275	2,652	10,608
29	Payroll taxes	29 25,290	14,152	2,216	8,922
30	Professional fundraising fees	30			
31	Accounting fees	31 23,250	13,500	9,750	
32	Legal fees	32			
33	Supplies (awards / campaign)	33 36,466	19,088	3,451	13,927
34	Telephone	34 6,404	3,364	467	2,573
35	Postage and shipping	35 9,472	4,986	897	3,589
36	Occupancy	36 16,910	8,455	1,691	6,764
37	Equipment rental and maintenance	37 8,007	2,753	3,658	1,596
38	Printing and publications (photography)	38 3,417	1,708	342	1,367
39	Travel	39 3,661	2,149	353	1,159
40	Conferences, conventions, and meetings	40 65,493	35,432	4,693	25,368
41	Travel advertising	41 2,000	1,000	200	800
42	Depreciation, depletion, etc. (attach schedule)	42 16,080	8,041	1,609	6,430
43	Other expenses not covered above (itemize):				
a	Insurance	43a 7,879	3,939	787	3,153
b	Dues & subscriptions	43b 7,407	4,517	578	2,312
c	Donor cultivation	43c 9,267	5,148	824	3,295
d	Endowment	43d 3,539	2,108	287	1,144
e	DeTocqueville society	43e 16,450	8,407	1,610	6,433
f	Public relations	43f 10,272	5,577	939	3,756
g	Agency liaison	43g 4,000	2,572	285	1,143
44	Total functional expenses. Add lines 22 through 43. (Organizations completing columns (B)-(D), carry these totals to lines 13-15)	44 3,280,145	2,969,837	74,375	235,933

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? 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.)	Program Service Expenses <small>(Required for 501(c)(3) and (4) orgs, and 4947(a)(1) trusts, but optional for others)</small>
a See attached schedule Part II, Line 22 (Grants and allocations \$ 2,628,363) If this amount includes foreign grants, check here <input type="checkbox"/>	
b (Grants and allocations \$) If this amount includes foreign grants, check here <input type="checkbox"/>	
c (Grants and allocations \$) If this amount includes foreign grants, check here <input type="checkbox"/>	
d (Grants and allocations \$) If this amount includes foreign grants, check here <input type="checkbox"/>	
e Other program services (attach schedule) (Grants and allocations \$) If this amount includes foreign grants, check here <input type="checkbox"/>	
f Total of Program Service Expenses (should equal line 44, column (B), Program services). <input type="checkbox"/>	

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) Beginning of year		(B) End of year	
Assets	45 Cash—non-interest-bearing	157,121	45	1,777,428	
	46 Savings and temporary cash investments	7,382,828	46	6,075,843	
	47a Accounts receivable	47a			
	b Less: allowance for doubtful accounts	47b		47c	
	48a Pledges receivable	48a 3,365,898			
	b Less: allowance for doubtful accounts	48b 123,200	3,771,748	48c	3,242,698
	49 Grants receivable			49	
	50 Receivables from officers, directors, trustees, and key employees (attach schedule)			50	
	51a Other notes and loans receivable (attach schedule)	51a			
	b Less: allowance for doubtful accounts	51b		51c	
	52 Inventories for sale or use			52	
	53 Prepaid expenses and deferred charges	953,208	53		558,432
	54 Investments—securities (attach schedule)	▶ <input type="checkbox"/> Cost <input type="checkbox"/> FMV		54	
	55a Investments—land, buildings, and equipment: basis	55a			
	b Less: accumulated depreciation (attach schedule)	55b		55c	
56 Investments—other (attach schedule)			56		
57a Land, buildings, and equipment: basis	57a 322,424				
b Less: accumulated depreciation (attach schedule)	57b 232,550	99,904	57c	89,874	
58 Other assets (describe ▶)			58		
59 Total assets (must equal line 74). Add lines 45 through 58.	12,364,809	59		11,744,275	
Liabilities	60 Accounts payable and accrued expenses	45,243	60	30,658	
	61 Grants payable		61		
	62 Deferred revenue	5,206,575	62		5,144,374
	63 Loans from officers, directors, trustees, and key employees (attach schedule)			63	
	64a Tax-exempt bond liabilities (attach schedule)			64a	
	b Mortgages and other notes payable (attach schedule)			64b	
	65 Other liabilities (describe ▶)			65	
66 Total liabilities. Add lines 60 through 65	5,251,818	66		5,175,032	
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 67 through 69 and lines 73 and 74.				
	67 Unrestricted	1,085,865	67	648,329	
	68 Temporarily restricted	6,027,126	68	5,920,914	
	69 Permanently restricted		69		
	Organizations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 70 through 74.				
	70 Capital stock, trust principal, or current funds		70		
	71 Paid-in or capital surplus, or land, building, and equipment fund		71		
	72 Retained earnings, endowment, accumulated income, or other funds		72		
	73 Total net assets or fund balances (add lines 67 through 69 or lines 70 through 72; column (A) must equal line 19; column (B) must equal line 21)	7,112,991	73		6,569,243
	74 Total liabilities and net assets/fund balances. Add lines 66 and 73.	12,364,809	74		11,744,275

Part VI Other Information (continued)

		Yes	No
82a	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?		X
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.)		
	82b		
83a	Did the organization comply with the public inspection requirements for returns and exemption applications?	X	
b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	X	
84a	Did the organization solicit any contributions or gifts that were not tax deductible?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
	84b	n/a	
85	501(c)(4), (5), or (6) organizations. a Were substantially all dues nondeductible by members?		
b	Did the organization make only in-house lobbying expenditures of \$2,000 or less? If "Yes" was answered to either 85a or 85b, do not complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year.		
	85a	n/a	
	85b	n/a	
c	Dues, assessments, and similar amounts from members	85c	n/a
d	Section 162(e) lobbying and political expenditures	85d	n/a
e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices	85e	n/a
f	Taxable amount of lobbying and political expenditures (line 85d less 85e)	85f	n/a
g	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?	85g	n/a
h	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?	85h	n/a
86	501(c)(7) orgs. Enter: a Initiation fees and capital contributions included on line 12	86a	n/a
b	Gross receipts, included on line 12, for public use of club facilities	86b	n/a
87	501(c)(12) orgs. Enter: a Gross income from members or shareholders	87a	n/a
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	87b	n/a
88	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	88	X
89a	501(c)(3) organizations. Enter: Amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶		
b	501(c)(3) and 501(c)(4) orgs. 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	89b	X
c	Enter: Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶		
d	Enter: Amount of tax on line 89c, above, reimbursed by the organization ▶		
90a	List the states with which a copy of this return is filed ▶ Florida		
b	Number of employees employed in the pay period that includes March 12, 2005 (See instructions.)	90b	
91a	The books are in care of ▶ Philip A. Whitacre Telephone no. ▶ (561) 655-1919 Located at ▶ 44 Cocoonut Row #201 Palm Beach, FL ZIP + 4 ▶ 33480		
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)? If "Yes," enter the name of the foreign country ▶ See the instructions for exceptions and filing requirements for Form TD F 90-22.1 , Report of Foreign Bank and Financial Accounts.	91b	X
c	At any time during the calendar year, did the organization maintain an office outside of the United States? If "Yes," enter the name of the foreign country ▶	91c	X
92	Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 92		

SCHEDULE A
(Form 990 or 990-EZ)

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

OMB No. 1545-0047

2005

Department of the Treasury
Internal Revenue Service

Supplementary Information—(See separate instructions.)

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

Name of the organization

Palm Beach Community Chest, Inc.

Employer identification number

59 : 0637885

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
Elizabeth Walton	VP & Campaign	94,425	4,720	
Total number of other employees paid over \$50,000 . ▶				

Part II-A 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
N/A		
Total number of others receiving over \$50,000 for professional services ▶		

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 individuals or firms. If there are none, enter "None." See page 2 of the instructions.)

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
Total number of other contractors receiving over \$50,000 for other 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.		x
2a Sale, exchange, or leasing of property?		x
2b Lending of money or other extension of credit?		x
2c Furnishing of goods, services, or facilities?		x
2d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)?	x	
2e Transfer of any part of its income or assets?		x
3a 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.)		x
3b Do you have a section 403(b) annuity plan for your employees?	x	
3c During the year, did the organization receive a contribution of qualified real property interest under section 170(h)?		
4a Did you maintain any separate account for participating donors where donors have the right to provide advice on the use or distribution of funds?		x
4b Do you provide credit counseling, debt management, credit repair, or debt negotiation services?		x

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 6 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 6 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
15 Gifts, grants, and contributions received. (Do not include unusual grants. See line 28.)	3,516,735	3,836,157	2,828,059	3,233,079	13,414,030
16 Membership fees received					
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					
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	427,428	263,372	239,078	391,609	1,321,487
19 Net income from unrelated business activities not included in line 18.					
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					
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					
22 Other income. Attach a schedule. Do not include gain or (loss) from sale of capital assets					
23 Total of lines 15 through 22	3,944,163	4,099,529	3,067,137	3,624,688	14,735,517
24 Line 23 minus line 17	3,944,163	4,099,529	3,067,137	3,624,688	14,735,517
25 Enter 1% of line 23	39,442	40,995	30,671	36,247	
26 Organizations described on lines 10 or 11: a Enter 2% of amount in column (e), line 24 ▶					26a 294,710
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. Do not file this list with your return. Enter the total of all these excess amounts ▶					26b
c Total support for section 509(a)(1) test: Enter line 24, column (e) ▶					26c 14,735,517
d Add: Amounts from column (e) for lines: 18 <u>1,321,487</u> 19 _____					26d 1,321,487
22 _____ 26b _____ ▶					26e 16,057,004
e Public support (line 26c minus line 26d total) ▶					26f 109 %
f Public support percentage (line 26e (numerator) divided by line 26c (denominator)) ▶					
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: (2004) _____ (2003) _____ (2002) _____ (2001) _____					
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 11b, 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: (2004) _____ (2003) _____ (2002) _____ (2001) _____					
c Add: Amounts from column (e) for lines: 15 _____ 16 _____					27c
17 _____ 20 _____ 21 _____ ▶					27d
d Add: Line 27a total, _____ and line 27b total ▶					27e
e Public support (line 27c total minus line 27d total) ▶					27f
f Total support for section 509(a)(2) test: Enter amount from line 23, column (e) ▶					27g %
g Public support percentage (line 27e (numerator) divided by line 27f (denominator)) ▶					27h %
h Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator)) ▶					
28 Unusual Grants: 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. 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)

	Yes	No
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? If "Yes," please describe; if "No," please explain. (If you need more space, attach a separate statement.)		
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?		
If you answered "No" to any of the above, please explain. (If you need more space, attach a separate statement.)		
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?		
If you answered "Yes" to any of the above, please explain. (If you need more space, attach a separate statement.)		
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? If you answered "Yes" to either 34a or b, please explain using an attached statement.		
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.

Limits on Lobbying Expenditures

(The term "expenditures" means amounts paid or incurred.)

		(a) Affiliated group totals	(b) To be completed for ALL electing organizations												
36	Total lobbying expenditures to influence public opinion (grassroots lobbying)	36													
37	Total lobbying expenditures to influence a legislative body (direct lobbying)	37													
38	Total lobbying expenditures (add lines 36 and 37)	38													
39	Other exempt purpose expenditures	39													
40	Total exempt purpose expenditures (add lines 38 and 39)	40													
41	Lobbying nontaxable amount. Enter the amount from the following table— <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">If the amount on line 40 is—</td> <td style="width: 50%;">The lobbying nontaxable amount is—</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>	If the amount on line 40 is—	The lobbying nontaxable amount is—	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		
If the amount on line 40 is—	The lobbying nontaxable amount is—														
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														
42	Grassroots nontaxable amount (enter 25% of line 41).	42													
43	Subtract line 42 from line 36. Enter -0- if line 42 is more than line 36.	43													
44	Subtract line 41 from line 38. Enter -0- if line 41 is more than line 38.	44													

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
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.

**Town of Palm Beach United Way
Current Major Contributors**

Donor	Amount
	\$10,200 00
	\$10,000.00
	\$6,000 00
	\$12,500 00
	\$10,000 00
	\$15,407 00
	\$10,000.00
	\$25,000 00
	\$5,489.00
	\$10,427 00
	\$10,000.00
	\$10,000 00
	\$15,200 00
	\$25,000 00
	\$10,200 00
	\$86,000 00
	\$10,200 00
	\$10,000 00
	\$10,000 00
	\$15,000 00
	\$10,000 00
	\$10,000 00
	\$10,000 00
	\$10,000 00
	\$10,200 00
	\$20,000 00
	\$10,000 00
	\$50,200 00
	\$10,000.00
	\$10,000.00
	\$5,000.00
	\$20,000.00
	\$5,000.00
	\$10,000 00
	\$10,000 00
	\$23,730 00
	\$10,000 00
	\$7,500.00
	\$15,000.00
	\$10,000.00
	\$10,000 00
	\$17,824 00
	\$10,000.00
	\$25,000 00
	\$10,000 00
	\$15,200 00
	\$75,000 00
	\$15,488.00
	\$10,000.00
	\$5,000.00
	\$10,000 00
	\$10,200 00
	\$5,000 00
	\$10,200 00

**Town of Palm Beach United Way
Current Major Contributors**

\$16,000.00
\$10,000.00
\$10,458.00
\$10,000 00
\$10,000 00
\$16,000 00
\$10,000 00
\$10,204 00
\$52,700 00
\$15,032 00
\$10,000 00
\$10,000.00
\$25,000 00
\$10,000 00
\$25,000.00
\$10,000 00
\$10,000.00
\$10,000 00
\$10,000 00
\$10,000 00
\$25,000.00
\$15,200 00
\$5,000 00
\$10,000 00
\$10,000 00
\$5,000 00
\$100,000 00
\$10,200.00
\$25,000.00
\$10,200.00
\$80,200 00
\$10,000 00
\$10,000 00
\$10,000.00
\$10,000 00
\$10,000 00
\$10,000.00
\$10,300 00
\$25,000 00
\$12,500 00
\$10,000 00
\$10,000 00
\$25,200.00
\$10,200.00
\$14,495.00
\$10,000 00
\$94,000 00
\$10,000 00
\$10,000.00
\$10,000.00
\$10,000.00
\$25,000 00
\$25,200 00
\$6,737.00
\$10,500.00

**Town of Palm Beach United Way
Current Major Contributors**

\$12,700 00
\$16,000 00
\$10,200.00
\$10,000.00
\$15,200.00
\$21,200.00
\$10,000.00
\$26,000.00
\$25,200.00
\$5,000 00
\$10,000 00
\$10,000 00
\$15,000 00
\$5,000.00
\$50,000 00
\$10,000 00
\$14,360.00
\$5,000 00
\$11,365 00
\$25,000 00
\$10,000 00
\$10,000 00
\$10,000 00
\$50,000.00
\$5,000.00
\$10,000.00
\$10,200 00
\$25,000 00
\$11,000 00
\$18,064 00
\$15,200.00
\$10,000 00
\$6,000.00
\$10,244 00
\$75,000.00
\$10,000.00
\$20,000 00
\$20,200.00
\$5,000 00
\$11,025 00
\$10,000.00
\$10,000 00
\$100,000 00
\$10,200 00
\$20,000.00
\$5,000 00
\$10,000 00
\$10,000 00
\$105,000 00
\$8,540 00
\$5,000 00
\$6,000 00
\$10,000 00
\$15,000 00
\$5,000 00

**Town of Palm Beach United Way
Current Major Contributors**

\$5,000 00
\$10,000.00
\$10,000.00
\$15,000.00
\$10,000.00
\$10,000 00
\$100,000 00
\$10,000 00
\$10,000 00
\$20,439.00
\$20,720.00
\$10,000.00
\$6,908.00
\$20,000.00
\$10,000 00
\$5,882 00
\$10,200 00
\$10,000 00
\$10,000 00
\$5,000 00
\$26,000.00
\$10,000.00
\$10,000 00

Part I, Line 16: Payment to Affiliates:

United Way of America \$ 33,874

Part I, Line 20: Other changes in net assets or fund balance:

Transfer from long term pledges \$ 786,000

Part II, Line 42: Depreciation:

Building \$ 10,461

Furniture & Equipment 5,619

Total \$ 16,080

Part IV, Line 57: Depreciation Assets:

	<u>Begining Of Year</u>	<u>End Of Year</u>
Building: 30 yr life - straight line method	189,358	195,334
Furniture & Equipment: various life - straight line methods	<u>127,016</u>	<u>127,090</u>
Total	<u>316,374</u>	<u>322,424</u>

Depreciation Assets:

Building	189,358	195,334
Furniture & Equipment	127,016	127,090
Less Accumulated Depreciation	<u>(210,158)</u>	<u>(232,550)</u>
Total	<u>106,216</u>	<u>89,874</u>

Part IV, Line 62: Support & Revenues Designated For Future Periods:

Deferred Revenues:

Contributions made in 2005/06 campaign for
2006/07 Allocations to Agencies & subsequent years \$ 5,144,374

ID#: 59-0637885

Year: 2006

Part II, Line 22: Grants & Allocations

<u>Agency Name</u>	<u>Amount</u>	<u>Agency Name</u>	<u>Amount</u>
Adopt-A-Family	27,000	Gratitude Guild	57,750
Aid To Victims of Domestic Violence	8,500	Growing Together	49,621
Agency Certification Initiative	15,000	Healthy Mothers/Healthy Babies	34,000
Agency Liaison	4,905	Hearts & Hope	47,000
Alzheimer's Community Care	58,000	Homeless Coalition of United Way	14,000
American Red Cross	20,000	Hospice & Homecare By The Sea	20,000
Area Agency on Aging	20,000	Jewish Community Center	72,000
Big Brothers/Big Sisters	50,000	Jewish Family & Children's Services	84,000
Boys & Girls Club	153,750	Kramer Senior Services	20,000
CARP	65,272	Legal Aid Society	45,350
Caridad Center	1,000	Leukemia Society	100
Catholic Charities	111,500	Mental Health Association	31,000
Center for Family Services	80,000	Migrant Assoc of South Florida	26,000
Center For Information & Crisis Svcs	131,850	Milagro Foundation, Inc.	18,500
Children's Case Management	31,000	Northwood Baptist Church	3,000
Children's Home Society	108,000	Opportunity, Inc.	80,000
Children's Place at Home Safe	64,000	Palm Beach County Literacy Coalition	83,000
Comprehensive Aids Program	25,000	Palm Beach Habilitation Center	85,000
Comprehensive Comm Care Network	20,000	Rehab Center for Children & Adults	10,100
Consumer Credit Counseling	16,000	Seagull Industries	168,500
C.R.O.S. Ministries	2,000	The ARC	127,000
Daily Bread Food Bank	55,075	The Lord's Place	31,500
Deaf Service Center	55,000	Turtle Nest Village, Inc.	14,000
Drug Abuse Foundation	43,890	Urban League	16,000
Drug Abuse Treatment Association	84,500	Volunteer Services of United Way	7,700
Farmworker's Coord. Council	104,000	YMCA of South Palm Beach	10,000
Girl Scout of Palm Glades Council	5,000	YMCA of the Palm Beaches	34,000
Gold Coast Down Syndrome	1,000	YWCA of Palm Beach County	78,000
Sub-total	\$ 1,361,242	Sub-total	\$ 1,267,121
		TOTAL	\$ 2,628,363

Town of Palm Beach United Way
Officers and Executive Committee
2005 – 2006

Officers

Sidney A. Kohl, Chairman
340 Royal Palm Way, 305
Palm Beach, FL 33480

J. Ira Harris, Vice Chairman
220 Sunrise Avenue, Suite 210
Palm Beach, FL 33480

Jim Held, Vice Chairman
101 El Vedado Road
Palm Beach, FL 33480

Danielle A. Hickox, Vice Chairman
277 Pendleton Avenue
Palm Beach, FL 33480

Ralph V. Moore, Vice Chairman
Northern Trust Bank of Florida
11301 U.S. Highway 1
Palm Beach Gardens, FL 33410

Michael J. Bracci, Treasurer
Northern Trust Bank of Florida
11301 U.S. Highway 1
Palm Beach Gardens, FL 33410

Mark Cook, Deputy Treasurer
340 Royal Palm Way, 101
Palm Beach, FL 33480

Sydelle Myer, Secretary
1040 North Lake Way
Palm Beach, FL 33480

Executive Committee

Gail Coniglio
1139 North Ocean Boulevard
Palm Beach, FL 33480

Christine W. Curtis
720 South Ocean Boulevard
Palm Beach, FL 33480

Diana Ecclestone
190 South Ocean Boulevard
Palm Beach, FL 33480

E. Llwyd Ecclestone
190 South Ocean Boulevard
Palm Beach, FL 33480

Peter Elwell
Town of Palm Beach
360 South County Road
Palm Beach, FL 33480

Kenn Karakul
101 El Vedado Road
Palm Beach, FL 33480

Beverly Savin
2792 Donnelly Drive, 261
Lantana, FL 33462