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Return of Organization Exempt From Income Tax

2001

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

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

A For the 2001 calendar year, or tax year beginning 2001, and ending 20

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

C Name of organization: Yellowstone to Yukon Conservation Initiative
 Number and street (or P.O. box if mail is not delivered to street address): 105 West Main Street E
 City or town, state or country, and ZIP + 4: Bozeman MT 59715

D Employer identification number: 81-0535303
E Telephone number: (406) 586-1600
F Accounting method: Cash Accrual
 Other (specify)

G Web site: www.y2y.net

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

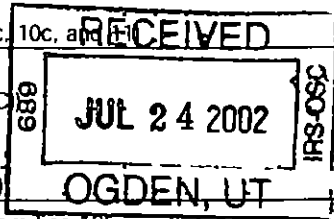
K Check here if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS, but if the organization received a Form 990 Package in the mail, it should file a return without financial data. Some states require a complete return.

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

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 Enter 4-digit GEN:
M Check if the organization is not required to attach Sch. B (Form 990, 990-EZ, or 990-PF)

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Specific Instructions on page 16.)

Revenue	1	Contributions, gifts, grants, and similar amounts received			
	a	Direct public support	1a	671,923	
	b	Indirect public support	1b	-	
	c	Government contributions (grants)	1c	-	
	d	Total (add lines 1a through 1c) (cash \$ 671,923 noncash \$ -)	1d	671,923	
	2	Program service revenue including government fees and contracts (from Part VII, line 93)	2	-	
	3	Membership dues and assessments	3	-	
	4	Interest on savings and temporary cash investments	4	2,854	
	5	Dividends and interest from securities	5	-	
	6a	Gross rents	6a	-	
	b	Less rental expenses	6b	-	
	c	Net rental income or (loss) (subtract line 6b from line 6a)	6c	-	
7	Other investment income (describe <u> </u>)	7	-		
Revenue	8a	Gross amount from sales of assets other than inventory	(A) Securities	8a	-
	b	Less cost or other basis and sales expenses	8b	-	
	c	Gain or (loss) (attach schedule)	8c	-	
	d	Net gain or (loss) (combine line 8c, columns (A) and (B))	8d	-	
Revenue	9	Special events and activities (attach schedule)			
	a	Gross revenue (not including \$ <u> </u> of contributions reported on line 1a)	9a		
	b	Less direct expenses other than fundraising expenses	9b		
c	Net income or (loss) from special events (subtract line 9b from line 9a)	9c	-		
Revenue	10a	Gross sales of inventory less returns and allowances	10a		
	b	Less cost of goods sold	10b		
	c	Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)	10c	-	
	11	Other revenue (from Part VII, line 103)	11	-	
	12	Total revenue (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)	12	674,777	
Expenses	13	Program services (from line 44, column (B))	13	268,893	
	14	Management and general (from line 44, column (C))	14	99,590	
	15	Fundraising (from line 44, column (D))	15	31,000	
	16	Payments to affiliates (attach schedule)	16	-	
	17	Total expenses (add lines 13 and 14, column (A))	17	398,483	
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 12)	18	276,294	
	19	Net assets or fund balances at beginning of year (from line 73, column (A))	19	227,300	
	20	Other changes in net assets or fund balances (attach explanation)	20		
	21	Net assets or fund balances at end of year (combine lines 18, 19, and 20)	21	503,594	



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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 Specific Instructions on page 21.)

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 \$ <u>186,134</u> noncash \$ <u>-</u>)	186,134	186,134		
23	Specific assistance to individuals (attach schedule)	-	-		
24	Benefits paid to or for members (attach schedule)	-	-		
25	Compensation of officers, directors, etc	-	-	-	-
26	Other salaries and wages	67,010	67,010	-	-
27	Pension plan contributions	-	-	-	-
28	Other employee benefits	7,107	7,107	-	-
29	Payroll taxes	5,646	5,646	-	-
30	Professional fundraising fees	-	-	-	-
31	Accounting fees	-	-	-	-
32	Legal fees	-	-	-	-
33	Supplies	-	-	-	-
34	Telephone	-	-	-	-
35	Postage and shipping	-	-	-	-
36	Occupancy	-	-	-	-
37	Equipment rental and maintenance	-	-	-	-
38	Printing and publications	-	-	-	-
39	Travel	-	-	-	-
40	Conferences, conventions, and meetings	-	-	-	-
41	Interest	-	-	-	-
42	Depreciation, depletion, etc (attach schedule)	-	-	-	-
43	Other expenses not covered above (itemize) a bank fees	721	366	355	-
b	directors insurance	1,475	-	1,475	-
c	consultants	2,630	2,630	-	-
d	Contract services	127,760	-	97,760	30,000
e					
44	Total functional expenses (add lines 22 through 43) Organizations completing columns (B)-(D), carry these totals to lines 13-15	398,483	268,893	99,590	30,000

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 Specific Instructions on page 24.)

What is the organization's primary exempt purpose? <i>See mission statement attached</i>	Program Service Expenses (Required for 501(c)(3) and (4) orgs. and 4947(a)(1) trusts, but optional for others.)
a <i>Wildlife conservation research - see attached</i> (Grants and allocations \$ <u>81,278</u>)	119,815
b <i>Conservation planning - see attached</i> (Grants and allocations \$ <u>19,800</u>)	19,800
c <i>Communications - see attached</i> (Grants and allocations \$ <u>43,600</u>)	43,600
d <i>Outreach - see attached</i> (Grants and allocations \$ <u>41,456</u>)	85,678
e Other program services (attach schedule) (Grants and allocations \$ _____)	
f Total of Program Service Expenses (should equal line 44, column (B), Program services)	268,893

Part IV Balance Sheets (See Specific Instructions on page 24)

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
45	Cash—non-interest-bearing	-	45	-
46	Savings and temporary cash investments	227,300	46	227,267
47a	Accounts receivable			
b	Less allowance for doubtful accounts	-	47c	-
48a	Pledges receivable			
b	Less allowance for doubtful accounts	-	48c	-
49	Grants receivable	-	49	218,590
50	Receivables from officers, directors, trustees, and key employees (attach schedule)	-	50	-
51a	Other notes and loans receivable (attach schedule)			
b	Less allowance for doubtful accounts	-	51c	-
52	Inventories for sale or use	-	52	-
53	Prepaid expenses and deferred charges	-	53	1,475
54	Investments—securities (attach schedule) <input type="checkbox"/> Cost <input type="checkbox"/> FMV	-	54	-
55a	Investments—land, buildings, and equipment basis			
b	Less accumulated depreciation (attach schedule)	-	55c	-
56	Investments—other (attach schedule)	-	56	-
57a	Land, buildings, and equipment basis			
b	Less accumulated depreciation (attach schedule)	-	57c	-
58	Other assets (describe _____)	-	58	-
59	Total assets (add lines 45 through 58) (must equal line 74)	227,300	59	507,332
60	Accounts payable and accrued expenses		60	3,738
61	Grants payable	-	61	-
62	Deferred revenue	-	62	-
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)		66	3,738
	Organizations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 67 through 69 and lines 73 and 74			
67	Unrestricted	-	67	99,487
68	Temporarily restricted	227,300	68	404,107
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)	227,300	73	507,332
74	Total liabilities and net assets / fund balances (add lines 66 and 73)	227,300	74	507,332

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.

Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return (See Specific Instructions, page 26)

a	Total revenue gains, and other support per audited financial statements ▶	a	674,777
b	Amounts included on line a but not on line 12, Form 990	b	-
(1)	Net unrealized gains on investments \$ -		
(2)	Donated services and use of facilities \$ -		
(3)	Recoveries of prior year grants \$ -		
(4)	Other (specify) \$ -		
	Add amounts on lines (1) through (4) ▶	b	-
c	Line a minus line b ▶	c	674,777
d	Amounts included on line 12, Form 990 but not on line a	d	-
(1)	Investment expenses not included on line 6b, Form 990 \$ -		
(2)	Other (specify) \$ -		
	Add amounts on lines (1) and (2) ▶	d	-
e	Total revenue per line 12, Form 990 (line c plus line d) ▶	e	674,777

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

a	Total expenses and losses per audited financial statements ▶	a	398,483
b	Amounts included on line a but not on line 17, Form 990	b	-
(1)	Donated services and use of facilities \$ -		
(2)	Prior year adjustments reported on line 20 Form 990 \$ -		
(3)	Losses reported on line 20, Form 990 \$ -		
(4)	Other (specify) \$ -		
	Add amounts on lines (1) through (4) ▶	b	-
c	Line a minus line b ▶	c	398,483
d	Amounts included on line 17, Form 990 but not on line a	d	-
(1)	Investment expenses not included on line 6b, Form 990 \$ -		
(2)	Other (specify) \$ -		
	Add amounts on lines (1) and (2) ▶	d	-
e	Total expenses per line 17, Form 990 (line c plus line d) ▶	e	398,483

Part V List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated, see Specific Instructions on page 26)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (if not paid, enter -0-)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
Katherine Deuel 126 E Broadway #7, Missoula MT 59802	Outreach us coordinator 40 hours	26,723	-	-
Carlin Fox 126 E Broadway #7 Missoula MT 59802	Outreach us Associate 40 hours	8,064	-	-
Marguarite Mahr P.O. Box 423, Kila MT 59920	Conservation Science Coordinator 40 hours	32,223	-	-
Jim Pissot 710 9th Street Studio B Canmore AB TIW 247	Executive director 9 hours	0	-	-
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75 Did any officer, director trustee, or key employee receive aggregate compensation of more than \$100,000 from your organization and all related organizations, of which more than \$10,000 was provided by the related organizations? Yes No
If "Yes," attach schedule—see Specific Instructions on page 27

Part VI Other Information (See Specific Instructions on page 27)		Yes	No
76	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>
77	Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>
78a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
78b	If "Yes," has it filed a tax return on Form 990-T for this year?	<input type="checkbox"/>	<input type="checkbox"/>
79	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>
80a	Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc., to any other exempt or nonexempt organization?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
80b	If "Yes" enter the name of the organization <u>Yellowstone to Yukon Conservation Initiative Society</u> and check whether it is <input checked="" type="checkbox"/> exempt OR <input type="checkbox"/> nonexempt	<input type="checkbox"/>	<input type="checkbox"/>
81a	Enter direct or indirect political expenditures See line 81 instructions		
81b	Did the organization file Form 1120-POL for this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
82b	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)		
83a	Did the organization comply with the public inspection requirements for returns and exemption applications?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
83b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
84a	Did the organization solicit any contributions or gifts that were not tax deductible?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
84b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		<u>N/A</u>
85a	501(c)(4), (5), or (6) organizations a Were substantially all dues nondeductible by members?	<input type="checkbox"/>	<input type="checkbox"/>
85b	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	<input type="checkbox"/>	<input type="checkbox"/>
85c	Dues assessments, and similar amounts from members		
85d	Section 162(e) lobbying and political expenditures		
85e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices		
85f	Taxable amount of lobbying and political expenditures (line 85d less 85e)		
85g	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?	<input type="checkbox"/>	<input type="checkbox"/>
85h	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?	<input type="checkbox"/>	<input type="checkbox"/>
86a	501(c)(7) orgs Enter a Initiation fees and capital contributions included on line 12		
86b	Gross receipts, included on line 12, for public use of club facilities		
87a	501(c)(12) orgs Enter a Gross income from members or shareholders		
87b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)		
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
89a	501(c)(3) organizations Enter Amount of tax imposed on the organization during the year under section 4911 <u>0</u> , section 4912 <u>0</u> , section 4955 <u>0</u>		
89b	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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
89c	Enter Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958		<u>0</u>
89d	Enter Amount of tax on line 89c, above, reimbursed by the organization		<u>0</u>
90a	List the states with which a copy of this return is filed		
90b	Number of employees employed in the pay period that includes March 12, 2001 (See instructions)		<u>2</u>
91	The books are in care of <u>Jane Bewick</u> Telephone no <u>(403) 609-6344</u> Located at <u>710 9th Street Studio B Canmore AB</u> ZIP + 4 <u>T1W 2V7</u>		
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	<input type="checkbox"/>	<u>92</u>

Part VII Analysis of Income-Producing Activities (See Specific Instructions on page 32)

	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	
93 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					
95 Interest on savings and temporary cash investments			14	2,854	
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					
103 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
104 Subtotal (add columns (B), (D), and (E))				2,854	
105 Total (add line 104, columns (B), (D), and (E))				2,854	2,854

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 Specific Instructions on page 32)

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)
▼	

Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities (See Specific Instructions on page 33)

(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 Specific Instructions on page 33)

(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]* Signature of officer Date: July 16, 2002

Jane Rewick, Finance and Operations Coordinator Type or print name and title

Paid Preparer's Use Only: Preparer's signature, Date, Check if self-employed, Preparer's SSN or PTIN, Firm's name (or yours if self-employed) address and ZIP + 4, EIN, Phone no.



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 Section 4947(a)(1) Nonexempt Charitable Trust

OMB No 1545-0047

2001

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

Yellowstone to Yukon Conservation Initiative

Employer identification number

81-0535303

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
<i>None</i>				
Total number of other employees paid over \$50,000 ▶	<i>0</i>			

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

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
<i>None</i>		
Total number of others receiving over \$50,000 for professional services ▶	<i>0</i>	

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 ▶ \$ <u>0</u> (Must equal amounts on line 38, Part VI-A, or line i of Part VI-B) Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A. Other organizations checking "Yes," must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities.		✓
2 During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary? (If the answer to any question is "Yes," attach a detailed statement explaining the transactions.)		
a Sale, exchange, or leasing of property?		✓
b Lending of money or other extension of credit?		✓
c Furnishing of goods, services, or facilities?		✓
d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)?	✓	
e Transfer of any part of its income or assets?		✓
3 Does the organization make grants for scholarships, fellowships, student loans, etc? (See Note below)		✓
4 Do you have a section 403(b) annuity plan for your employees?		✓

Note: Attach a statement to explain how the organization determines that individuals or organizations receiving grants or loans from it in furtherance of its charitable programs "qualify" to receive payments

Part IV Reason for Non-Private Foundation Status (See pages 3 through 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)** section 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2) (See section 509(a)(3))

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

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

- 14** An organization organized and operated to test for public safety Section 509(a)(4) (See page 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) 2000	(b) 1999	(c) 1998	(d) 1997	(e) Total
15 Gifts, grants, and contributions received (Do not include unusual grants See line 28)	227,300	-	-	-	227,300
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	-	-	-	-	-
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	227,300	-	-	-	227,300
24 Line 23 minus line 17	227,300	-	-	-	227,300
25 Enter 1% of line 23	2,273	-	-	-	-

26 Organizations described on lines 10 or 11:	a Enter 2% of amount in column (e), line 24	26a
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 1997 through 2000 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
d Add Amounts from column (e) for lines 18 _____ 19 _____ 22 _____ 26b _____		26d
e Public support (line 26c minus line 26d total)		26e
f Public support percentage (line 26e (numerator) divided by line 26c (denominator))		26f %

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

(2000) _____	(1999) _____	(1998) _____	(1997) _____
--------------	--------------	--------------	--------------

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

(2000) _____	(1999) _____	(1998) _____	(1997) _____
--------------	--------------	--------------	--------------

c Add Amounts from column (e) for lines 15 <u>227,300</u> 16 _____ 17 _____ 20 _____ 21 _____	27c	227,300
d Add Line 27a total _____ and line 27b total _____	27d	
e Public support (line 27c total minus line 27d total)	27e	227,300
f Total support for section 509(a)(2) test Enter amount from line 23, column (e)	27f	227,300
g Public support percentage (line 27e (numerator) divided by line 27f (denominator))	27g	100 %
h Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))	27h	0 %

28 Unusual Grants For an organization described in line 10, 11, or 12 that received any unusual grants during 1997 through 2000, 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— 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	41	
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) 2001	(b) 2000	(c) 1999	(d) 1998	(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 12 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

- 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)

Yes	No	Amount
	✓	
	✓	
	✓	
	✓	
	✓	
	✓	
	✓	
	✓	
	✓	
	✓	

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

Part VII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations (See page 12 of the instructions)

51 Did the reporting organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

- a** Transfers from the reporting organization to a noncharitable exempt organization of
 - (i) Cash
 - (ii) Other assets
- b** Other transactions
 - (i) Sales or exchanges of assets with a noncharitable exempt organization
 - (ii) Purchases of assets from a noncharitable exempt organization
 - (iii) Rental of facilities, equipment, or other assets
 - (iv) Reimbursement arrangements
 - (v) Loans or loan guarantees
 - (vi) Performance of services or membership or fundraising solicitations
- c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- d** If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the organization received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

	Yes	No
51a(i)		✓
a(ii)		✓
b(i)		✓
b(ii)		✓
b(iii)		✓
b(iv)		✓
b(v)		✓
b(vi)		✓
c		✓

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

52a Is the organization directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ▶ Yes No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Supplementary Information for
line 1 of Form 990, 990-EZ and 990-PF (see instructions)

OMB No 1545-0047

2001

Name of organization

Yellowstone to Yulka Conservation Initiative

Employer identification number

81-0535308

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General rule** or a **Special rule**. (Note: Only a section 501(c)(7), (8), or (10) organization can check box(es) for both the General rule and a Special rule—see instructions.)

General Rule—

For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor (Complete Parts I and II)

Special Rules—

For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of \$5,000 or 2% of the amount on line 1 of these forms (Complete Parts I and II)

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals (Complete Parts I, II, and III)

For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000 (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the Parts unless the General rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year) ▶ \$ _____

Caution: Organizations that are not covered by the General rule and/or the Special rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** check the box in the heading of their Form 990, Form 990-EZ, or on line 1 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization

Yellowstone to Yukon Conservation Initiative

Employer identification number

81-0535309

Part I Contributors (See Specific Instructions)

(a) No	(b) Name, address and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>1</u>		\$ <u>220,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>2</u>		\$ <u>110,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>3</u>		\$ <u>30,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>4</u>		\$ <u>25,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>5</u>		\$ <u>20,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>6</u>		\$ <u>10,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization

Employer identification number

81-0535303

Part I Contributors (See Specific Instructions)

(a) No.	(b) Name, address and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>7</u>		\$ <u>10,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>8</u>		\$ <u>10,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>9</u>		\$ <u>8,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization Yellowstone to Yukon Conservation Initiative Employer identification number 81-0535303

Part II Noncash Property (See Specific Instructions)

(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<u>None</u>	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /
—	\$	/ /

Name of organization

Employer identification number

Part II Noncash Property (See Specific Instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
____	\$ / .. / ..
(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
____	\$ / .. / ..
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
____	\$ / .. / ..
(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
____	\$ / .. / ..
(a) No from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
____	\$ / .. / ..
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
____	\$ / .. / ..

Name of organization

Employer identification number

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete columns (a) through (e) and the following line entry)

For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once—see instructions) ▶ \$

(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	name		

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Name of organization	Employer identification number
----------------------	--------------------------------

Part III *Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year (Complete columns (a) through (e) and the following line entry)
 For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once—see instructions) ▶ \$

(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
.....	
(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
.....	
(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
.....	
(a) No from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
.....	

Yellowstone to Yukon Conservation Initiative
990 – 2001

Part VI

Line 76

See attached contract 'Agency Agreement'

On February 25, 2001 Yellowstone to Yukon Conservation Initiative (Y2Y-Montana) entered into an Agency Agreement with Yellowstone to Yukon Conservation Initiative Society (Y2Y-Alberta), a non-profit Society incorporated in Alberta, Canada Y2Y-Montana receives funds given in the United States to be used in Y2Y programs. Y2Y-Montana maintains full and complete direction, control and supervision over the application of the funds it receives Y2Y-Montana contracts with Y2Y-Alberta for services rendered for the purpose of carrying out its charitable activities

AGENCY AGREEMENT

THIS AGREEMENT made this 25 day of February, 2001

BETWEEN

Yellowstone to Yukon Conservation Initiative
105 West Main St
Suite E
Bozeman, MT
59715 - 5016
(the "Charity")

OF THE FIRST PART,

AND

Yellowstone to Yukon Conservation Initiative Society
710 - 9th Street
Studio B
Canmore, Alberta
T1W 2V7
(the "Agent")

OF THE SECOND PART

WHEREAS the Charity is a registered charity as described in section 501(c)(3) under section 501(a) of the *Internal Revenue Code* of the United States of America (the "Code"),

AND WHEREAS the Charity wishes to retain the Agent for the purpose of carrying out certain of its charitable activities,

NOW THEREFORE this Agreement witnesses that, in consideration of the covenants herein contained, THE PARTIES AGREE AS FOLLOWS

- 1 The Charity from time to time shall provide to the agent such sums (the "Charity Funds") as it may, in its discretion and in accordance with its charitable objectives, determine. The Charity Funds are to be administered and disbursed by the Agent only in accordance with this Agreement.
- 2 The Charity Funds shall be applied by the Agent only in such manner as the charity directs in writing, and solely in satisfaction of the Charity's charitable objectives. Without limiting the generality of the foregoing, the Charity Funds shall be used to contribute to and to improve the education, health and welfare of the general public and to benefit the community as a whole by the promotion and encouragement of the beneficial use, management, protection, preservation, creation, and expansion of national and provincial parks and

other places of special historic or natural significance; and to encourage cooperation in, support for and research into all matters pertaining to the fulfillment of the above objects. All expenditures of the Charity Funds will be made only pursuant to the Charity's written authorization and will be supported by vouchers and/or other relevant documentation. The Agent agrees that, upon the request of the Charity, the Agent will be available for consultation with a representative or representatives of the Charity.

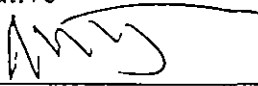
- 3 For greater clarity, the Charity shall have and will maintain full and complete direction, control and supervision over the application of all of the Charity Funds
- 4 From time to time, the Charity and the Agent shall enter into Agreements to be attached as Schedules to this Agreement. Such Agreements shall provide clear descriptions and specific details about the activities to be carried on by the Agent on behalf of the Charity and about the exact amount of funds to be expended thereby. Each such Agreement attached as a Schedule to this Agreement shall be dated, and shall contain a clause specifying the dates on which the appended Schedule to this Agreement is to be in force. At all times when Charity Funds are being administered and disbursed by the Agent there shall be at least one appended Schedule to this Agreement in force.
- 5 The Agent acknowledges that the Charity and any contract into which the Charity enters are subject to the provisions and requirements of the Act.
- 6 The Charity Funds shall be kept segregated by the Agent from its own funds and the Agent shall provide an accounting and such documentation as the Charity may require from time to time in order that the Charity is kept fully informed as to the use and application of the Charity Funds. The role of the Charity in any particular project or endeavour shall be separately identifiable as its own charitable activity.
- 7 The Agent must provide to the Charity continuous and comprehensive reporting, at least annually or more often as the Charity may require, concerning the ongoing activities and projects which are carried out on the Charity's behalf.
- 8 Full financial and administrative records and reports are to be maintained by the Agent (in a form acceptable to the Charity) about the application of the Charity Funds. These reports must set forth and confirm the amount of the Charity Funds received by the Agent and must give a detailed breakdown of the expenditures made in respect of the specific activities performed by the Agent so as to enable the Charity to make informed decisions as to the application of its funds and to maintain full and complete books and records of same.
- 9 Such reports are to be supplemented, at least annually, or more often as the Charity may require, by a financial report reflecting the use of the funds transferred to the Agent. These reports are to be kept with the Charity's other

records and books of account at 105 West Main Street, Suite E, Bozeman, Montana, 59715

- 10 In order to observe and evaluate those specific activities and programs and to inspect all records relating to same, the Agent will permit members of the Charity's Coordinating Committee, or an Auditor of the US Internal Revenue Service, to enter at reasonable times the premises used by the Agent in connection with the specific activities and programs for which the Agent is responsible pursuant to this Agreement

Signed by

Yellowstone to Yukon Conservation Initiative



Signature

Michael Scott
Print Name

Chair
Title

Yellowstone to Yukon Conservation Initiative Society



Signature

James H. Pissot
Print Name

Executive Director
Title



YELLOWSTONE TO YUKON
CONSERVATION INITIATIVE

Mission Statement

The Yellowstone to Yukon Conservation Initiative
People working together to maintain and restore the unique natural heritage of the
Yellowstone to Yukon region.

Combining science and stewardship, we seek to ensure that the world-renowned wilderness, wildlife, native plants and natural processes of the Yellowstone to Yukon region continue to function as an interconnected web of life, capable of supporting all of the natural and human communities that live within it, for now and for future generations.

Vision Statement

Ours is a vision for the future of the wild heart of North America. Aware that the Yellowstone to Yukon region constitutes the world's last best chance to retain a fully functioning mountain ecosystem, we envision a day

- When a life-sustaining web of protected wildlife cores and connecting wildlife corridors has been defined and designated for the Yellowstone to Yukon region;
- When that life-sustaining web is embraced as a source of pride for those who live within it, and is acknowledged as a living testimony to a society wise enough to recognize the need for such a web, altruistic enough to create it, and prudent enough to maintain it;
- When all natural and human communities in the Yellowstone to Yukon region coexist in a healthy mountain ecosystem of clean air and water, abiding beauty, and abundant wildlife and wilderness;
- When natural resources in the region are managed with the goals of ecosystem integrity and long-term economic prosperity in mind;
- And when residents of the Yellowstone to Yukon region take it for granted that their long-term personal, spiritual, and economic well-being is inextricably connected to the well-being of natural systems

Y2Y

990 - 2004

Part III

- a. **Wildlife Conservation research** We are identifying the habitat needs of wildlife in the Rocky Mountains to determine which core and connecting areas are needed to perpetuate wildlife populations. We have published an *Atlas* and will produce maps and narratives describing wildlife and human needs. We make Y2Y science available as a tool for making land management decisions.
- b. **Conservation planning** We integrate on-the-ground wildlife information with population and distribution models that consider larger landscapes. We provide information for the conservation of biological diversity. In addition, we try to understand and incorporate other human values into our habitat conservation maps, including recreational, aesthetic and spiritual values and the knowledge and traditions of aboriginal people.
- c. **Communications** We work to understand the values, needs and attitudes of residents in the Y2Y region and to develop tools and messages for more effective communication with them.
- d. **Outreach** We produce publications, slide presentations and other materials for public education, which is central to our mission. We make presentations to general audiences regarding the wildlife needs and socio-economic dynamics in the region and we respond to inquiries. We also maintain a web site and provide training and other services to other organizations.

Form **5768**

(Rev. December 1996)

Department of the Treasury
Internal Revenue Service

Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation

(Under Section 501(h) of the Internal Revenue Code)

For IRS
Use Only ▶

Name of organization

Yellowstone to Yukon Conservation Initiative

Employer identification number

81 0535303

Number and street (or P.O. box no. if mail is not delivered to street address)

C/O Bob Ekeg, 105 W Main St

Room/suite

Suite E

City, town or post office and state

Bozeman Montana

ZIP + 4

59715-5016

1 Election—As an eligible organization we hereby elect to have the provisions of section 501(h) of the Code, relating to expenditures to influence legislation, apply to our tax year ending December 31, 2002 and all subsequent tax years until revoked (Month day and year)

Note This election must be signed and postmarked within the first taxable year to which it applies

2 Revocation—As an eligible organization, we hereby revoke our election to have the provisions of section 501(h) of the Code, relating to expenditures to influence legislation, apply to our tax year ending _____ (Month day and year)

Note This revocation must be signed and postmarked before the first day of the tax year to which it applies

Under penalties of perjury, I declare that I am authorized to make this (check applicable box) election revocation on behalf of the above named organization

James H. Assol
(Signature of officer or trustee)

James H. Assol, Executive Director
(Type or print name and title)

17 July 02
(Date)

General Instructions

Section references are to the Internal Revenue Code

Section 501(c)(3) states that an organization exempt under that section will lose its tax-exempt status and its qualification to receive deductible charitable contributions if a substantial part of its activities are carried on to influence legislation. Section 501(h), however, permits certain eligible 501(c)(3) organizations to elect to make limited expenditures to influence legislation. An organization making the election will, however, be subject to an excise tax under section 4911 if it spends more than the amounts permitted by that section. Also, the organization may lose its exempt status if its lobbying expenditures exceed the permitted amounts by more than 50% over a 4-year period. For any tax year in which an election under section 501(h) is in effect, an electing organization must report the actual and permitted amounts of its lobbying expenditures and grass roots expenditures (as defined in section 4911(c)) on its annual return required under section 6033. See Schedule A (Form 990). Each electing member of an affiliated group must report these amounts for both itself and the affiliated group as a whole.

To make or revoke the election, enter the ending date of the tax year to which the election or revocation applies in item 1 or 2, as applicable, and sign and date the form in the spaces provided.

Eligible Organizations—A section 501(c)(3) organization is permitted to make the election if it is not a disqualified organization (see below) and is described in:

- 1. Section 170(b)(1)(A)(ii) (relating to educational institutions),
- 2. Section 170(b)(1)(A)(iii) (relating to hospitals and medical research organizations),
- 3. Section 170(b)(1)(A)(iv) (relating to organizations supporting government schools),
- ✓ 4. Section 170(b)(1)(A)(vi) (relating to organizations publicly supported by charitable contributions),
- 5. Section 509(a)(2) (relating to organizations publicly supported by admissions, sales, etc.), or
- 6. Section 509(a)(3) (relating to organizations supporting certain types of public charities other than those section 509(a)(3) organizations that support section 501(c)(4), (5), or (6) organizations).

Disqualified Organizations.—The following types of organizations are not permitted to make the election:

- a. Section 170(b)(1)(A)(i) organizations (relating to churches),

- b. An integrated auxiliary of a church or of a convention or association of churches, or
- c. A member of an affiliated group of organizations if one or more members of such group is described in a or b of this paragraph.

Affiliated Organizations—Organizations are members of an affiliated group of organizations only if (1) the governing instrument of one such organization requires it to be bound by the decisions of the other organization on legislative issues, or (2) the governing board of one such organization includes persons (i) who are specifically designated representatives of another such organization or are members of the governing board, officers, or paid executive staff members of such other organization, and (ii) who, by aggregating their votes, have sufficient voting power to cause or prevent action on legislative issues by the first such organization.

For more details, see section 4911 and section 501(h).

Note: A private foundation (including a private operating foundation) is not an eligible organization.

Where To File.—Mail Form 5768 to the Internal Revenue Service Center, Ogden, UT 84201-0027.