

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF REVENUE

BUREAU OF BUSINESS TRUST FUND TAXES

January 24, 1991

DEPT. 280901
HARRISBURG, PA 17128-0901

Upper Delaware Unitarian Universalist
Fellowship, Inc.
River Road
P.O. Box 123
Milanville, PA 18443-0123

Dear Mr. Rue:

Re: Exemption Number 75-99106-1

Your application for sales tax exempt status indicates that you qualify as a religious organization and are entitled to exemption under the law. The enclosed "Certificate of Exemption" serves as your authority to make tax-free purchases.

The exemption given to your organization is limited and does not apply to:

- (a) The purchase of materials, supplies or equipment used in the construction, remodeling or repair of real estate, and equipment used in the maintenance of real estate;
- (b) The purchase by a member, officer or leader of the organization;
- (c) Charges subject to hotel or motel occupancy tax;
- (d) Purchases by the organization acting as a collection agent for its membership;
- (e) Purchases for an unrelated trade or business.

To qualify for exemption, the purchase must be made in the name of the organization and with money from its funds. We suggest you become familiar with the provisions of Regulation 205, a copy of which is enclosed. If after reviewing this material you have any questions, please do not hesitate to contact the bureau.

If the organization makes taxable sales, although for fund raising purposes, it must register with the bureau for the collection of tax.

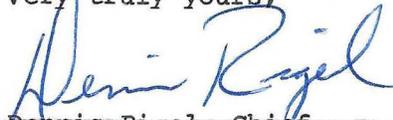
Upper Delaware Unitarian Universalist
Fellowship, Inc.

-2-

January 24, 1991

At the time of making tax-free purchases, the organization must issue an exemption certificate to the seller in lieu of the payment of tax. A Blanket Exemption Certificate, of the type herein enclosed, once issued to the supplier may be used for all future exempt purchases. The certificate must contain the Exemption Number appearing above. You may reproduce additional copies as the bureau does not supply exemption certificate forms in bulk.

Very truly yours,



Dennis Rigel, Chief
Registration Division
Telephone (717) 783-0302

Enclosures

DR:KP:jw:J:158

S:BTF:ST:18-19

UPPER DELAWARE VALLEY UNITARIAN UNIVERSALIST FELLOWSHIP

P.O. BOX 123, MILANVILLE, PA 18443

~~X DEBORAH KAZARIK, PRESIDENT X 191 X 482 X 35 X~~

Reply to: P.O. Box 706
Monticello NY 12701
(914) 791-7014

December 27, 1990

Pennsylvania Department of Revenue
Bureau of Business Trust Fund Taxes
Registration Division
Department 280901
Harrisburg, Pennsylvania 17128-0901

Dear Madame or Sir:

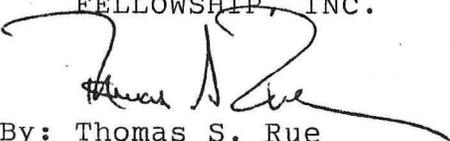
Enclosed herewith is a completed Application for Sales Tax Exempt Status, together with the following attachments: (1) I.R.S. Notice of Employer Identification Number dated 5/18/87; (2) Certificate of Incorporation (New York) filed 3/13/90; (3) By-Laws adopted 4/29/90; (4) Consent to Action Taken in Lieu of Organizational Meeting dated 4/29/90; (5) letters from the Unitarian Universalist Association of Congregations dated 10/28/90; (6) I.R.S. Letter of Determination dated 12/28/62 and Verification of Tax-Exempt Status dated 7/19/84; (7) Statement of Activities; (8) financial statements, period ending 6/17/90; and (9) list of charter members.

Please note, on 11/18/90, Article IV of the By-Laws was amended to read as follows: "This fellowship shall be a member of the Unitarian Universalist Association, and of the Joseph Priestley District [changed from Metropolitan New York]..." (see notice of special meeting of members dated 11/3/90, attached to copy of By-Laws).

Also note, in response to item #19 on page two of the application form, the fellowship has no salaried or otherwise compensated employees.

Please contact me directly, at the above typed address or phone number, if there are any questions, or if additional information is needed. Thank you very much for your assistance..

Very truly yours,
UPPER DELAWARE U.U.
FELLOWSHIP, INC.


By: Thomas S. Rue
President

tsr
Enclosures



COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF REVENUE
BUREAU OF BUSINESS TRUST FUND TAXES
REGISTRATION DIVISION
DEPT. 280901
HARRISBURG, PA 17128-0901

APPLICATION FOR SALES TAX EXEMPT STATUS

Please Print or Type

BUREAU USE ONLY	
Exemption Number:	
Approved as:	
Denied:	
Date:	

1. This organization is operated exclusively as a (check one):			
<input type="checkbox"/> Charitable Organization <small>(including volunteer ambulance and rescue squads)</small>	<input checked="" type="checkbox"/> Religious Organization	<input type="checkbox"/> Non-Profit Educational Institution	<input type="checkbox"/> Volunteer Fire Company
2. Organization's full name		Telephone Number	
Upper Delaware Unitarian Universalist Fellowship, Inc.		(914) 791-7014	
3. Organization's complete address			
Street	City/Town	State	Zip Code
River Road (P.O. Box 123), Milanville PA 18443-0123			
4. Is organization incorporated in Pennsylvania?		4a. If yes, date of incorporation (month, day, year)	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No New York		March 13, 1990	
4b. If no, what is organization form? (e.g. club, trust, association)		4c. Date of formation of organization (month, day, year)	
N/A		September 20, 1987	

If applying as a "RELIGIOUS ORGANIZATION", complete the following:

5. Is your main purpose to hold and conduct religious activities or religious education in Pennsylvania?		<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
5a. Does your organization hold regular religious services?		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, how often? <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Other: _____			
5b. With what synod, diocese or other group is your organization affiliated?			
Name Unitarian Universalist Association of Congregations n North America			
Address 25 Beacon Street, Boston, Massachusetts 02108			

If applying as a "NON-PROFIT EDUCATIONAL INSTITUTION", complete the following:

6. Is your organization licensed or registered by the Pennsylvania Department of Education?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, licensing date (month, day, year): _____			
6a. Is your organization operated by a religious organization as a non-profit education institution?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, list organization's name and address:			
Name _____			
Address _____			

If applying as a "VOLUNTEER FIRE COMPANY", complete the following:

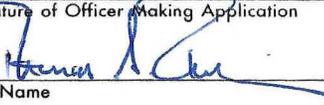
7. Does your organization own/operate a social club for its membership and/or the public?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, is it a separate entity (e.g. auxiliary) from that of your organization?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, is the social club licensed to collect and remit Pennsylvania sales tax?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If licensed, provide Pennsylvania sales tax license number _____			
7a. Was your organization created solely for the purpose of fighting fires?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If no, list the other purposes _____			

8.	Is your organization an outgrowth of another organization? If yes, name and address of that organization:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	Name _____	
	Address _____	
8a.	Are you now, or are you planning to be affiliated with an organization(s)? If yes, list name, address and date of affiliation or proposed affiliation.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Name _____	Date _____
	Address <u>Unitarian Universalist Association of Congregations</u>	<u>October 28, 1990</u>
	<u>25 Beacon Street, Boston, Massachusetts 02108</u>	
8b.	Have you made or do you plan to make any distribution of your organization's property to organization shareholders or members?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
8c.	Do you participate or plan to participate (including financially or through the publication or distribution of statements) in any political campaign in behalf of or in opposition to any candidate for public office or party?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
8d.	Does any part of your income benefit any private shareholder or individual?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
9.	Is your organization's income derived exclusively from voluntary contributions, public or private? If no, attach a statement explaining how income is derived (e.g. by sales of items or services) and include the percentage of your annual income derived from voluntary contributions.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
10.	Has any state or court ever declared that your organization is organized and operated for charitable purposes? If yes, attach a copy of the administrative or judicial decision.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
11.	Is your organization registered with the Pennsylvania Department of State, Bureau on Charitable Organizations for the purpose of fund raising activities? If yes, give issue or renewal date (month, day, year): _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
12.	Estimate the total value of tax exempt purchases your organization reasonably expects to make during a year using a Pennsylvania sales tax exemption number: \$ <u>500.00</u>	

THE FOLLOWING DOCUMENTS MUST BE ATTACHED TO THE APPLICATION (use 8 1/2" x 11" sheets where possible):

- | | |
|------------|--|
| 13. | A copy of: Articles of Incorporation; Constitution; Articles of Association; Declaration of Trust, or other documents which show or set forth your organization's aims and purposes. Include copies of all amendments and any changes under consideration. |
| 14. | A copy of your bylaws or other similar rules or regulations, all amendments, and any changes under consideration. |
| 15. | A statement outlining how your assets would be distributed if your organization were dissolved. You may omit this if this information is contained in other attached documents. |
| 16. | A copy of your organization's latest annual/fiscal financial statement and/or proposed budget. |
| 17. | A statement which describes the activities your organization performs to achieve the goals/objectives stated in its bylaws or articles. |
| 18. | List beneficiaries of your activities (individuals, the general public, other organizations) and how those beneficiaries are selected. |
| 19. | A list of positions, salaries and other compensations for the three highest paid employees/officers. |
| 20. | List sales activities used to raise funds. (Gift shop, book store, social clubs, etc.) |

THIS IS TO CERTIFY THAT THE INFORMATION PROVIDED, INCLUDING ACCOMPANYING STATEMENTS, IS TRUE, CORRECT AND COMPLETE.

Signature of Officer Making Application 	
Print Name Thomas S. Rue	Print Title President
Address and Phone Number (if other than on questions 2 and 3). 23 Fisk Avenue (P.O. Box 706) Monticello, New York 12701-0706	Telephone Number (914) 791-7014

FALSE OR FRAUDULENT APPLICATION IS PUNISHABLE BY A FINE OF \$1,000 OR IMPRISONMENT FOR ONE YEAR OR BOTH.

STATEMENT OF ACTIVITIES

On September 20, 1987, the Upper Delaware Unitarian Universalist Fellowship was organized. Since then, the fellowship has met regularly on Sunday mornings, at the Innisfree Recreation Hall, River Road, Milanville, Pennsylvania. After incorporating the fellowship reorganized on June 17, 1990, at its third Annual Meeting of members, with 21 charter members. At that meeting, the following statement was adopted:

Statement of Purpose

We, the members of the members of the Upper Delaware Unitarian Universalist, are gathered into a committed relationship:

- To make possible a caring and supportive community in which each individual will feel free to chart his or her own spiritual journey in the search for ultimate meaning in life;

- To create an atmosphere in which each person will be able to share convictions, express doubts, and explore new dimensions of truth and reality;

- To provide a community in which there will be no divisions because of class, ethnic origin, race or sexual orientation;

- To offer a place and climate for regular worship, which includes such things as fellowship, meditation, learning, and a free and open pulpit;

- To work for the vision of a better world by standing for the cause of social justice and human rights, supporting efforts for world peace, and seeking to protect the earth's environment through our respect for the interdependent web of all living things;

- To join with others in the tradition of free and open religion in affiliation with the Unitarian Universalist Association;

- To bear witness to our convictions as Unitarian Universalists in this entire region by giving our support to the Upper Delaware fellowship through the dedication of our energies and time and finances, knowing that unless the local group is strong and healthy, little else can be accomplished.

On October 26, 1990, the board of trustees of the Unitarian Universalist Association of Congregations, met at Boston, Massachusetts, formally accepted the Upper Delaware fellowship as a member congregation.

The corporation will continue to function, as it has for over three years, as a religious organization, holding regularly scheduled worship services, community activities and fund-raisers for its own purposes and for other organizations which are exempt from taxation under Section 501(c)(3) of the Internal Revenue Code, and such other meetings or activities as the membership or Executive Committee may from time to time consider appropriate, none of which shall be contrary to applicable state or federal law or regulations.

CHARTER MEMBERS OF

The Upper Delaware Unitarian Universalist Fellowship

1. George Bailey, P.O. Box 24, Milanville PA 18443
2. Margaret Bryant, P.O. 313, Smallwood NY 12778
3. Jane DeEsch, P.O. Box 35, Greeley PA 18425
4. Kaare H. Gundersen, Lake Ariel PA 18436
5. Shirley Marshall, 627 Park Street, Honesdale PA 18443
6. Gilbert H. Mende, P.O. Box , Honesdale PA 18443
7. Eve Murphy, R.D. 3, Box 515, Honesdale PA 18443
8. John B. Niflot, R.D. 1, Box 11, Long Eddy NY 12760
9. Barbara E. Pontier, R.D. 2, Box 626, Narrowsburg NY 12764
10. Glenn Pontier, R.D. 2, Box 363, Narrowsburg
11. Rev. Raymond J. Pontier, R.D. 2, Box 286, Narrowsburg NY 127641.
12. Ann Rue, P.O. Box 47, Milanville PA 18443
13. Carmen Hernandez Rue, P.O. Box 706, Monticello NY 12701
14. Clyde B. Rue, P.O. Box 47, Milanville PA 18443
15. John D. Rue, P.O. Box 47, Milanville PA 18443
16. Thomas S. Rue, P.O. Box 706, Monticello NY 12701
17. Jay C. Shames, 11 Schumacher Pond Road, Barryville NY 12719
18. Helen J. Sidwell, 1225 N.W. 21st Street, Stuart FL 34994
19. Thomas D. Sidwell, 1225 N.W. 21st Street, Stuart FL 34994
20. Laurie Stuart, R.D. 2, Box 363, Narrowsburg NY 12764
21. Deborah Lazarus Yarzagaray, P.O. Box 621, Jeffersonville NY 12748

CONSENT TO ACTION TAKEN
IN LIEU OF ORGANIZATIONAL MEETING
of the
UPPER DELAWARE UNITARIAN UNIVERSALIST FELLOWSHIP, INC.

The undersigned, being the incorporators of the Upper Delaware Unitarian Universalist Fellowship, Inc., hereby consent to the actions taken, as hereafter stated, in lieu of an organizational meeting:

A copy of the Certificate of Incorporation, together with the receipt issued by the Department of State showing the date and payment of the filing fee for the original Certificate of Incorporation, is ordered appended to this statement.

By-Laws regulating the conduct and the affairs of the corporation, as prepared by the Executive Committee, are adopted and ordered appended hereto.

The following persons are appointed to the Executive Committee of the corporation, to serve until re-elected or replaced at the annual meeting in June 1990:

Officers:

- Deborah Lazarus, Jeffersonville, NY (President)
- Margaret Bryant, Smallwood, NY (Vice-President)
- Thomas S. Rue, Monticello, NY (Secretary)
- Carmen Hernandez Rue, Monticello, NY (Treasurer)

Members-At-Large:

- Barbara Pontier, Narrowsburg, New York
- Clyde B. Rue, Milanville, Pennsylvania
- Jay Shames, Barryville, New York

The principal office of the corporation is fixed at: P.O. Box 123, Milanville, Pennsylvania, 18443. The registered address for service of process in the State of New York is: c/o Palant, Sbeglia & Shames, Esqs., 299 Broadway, Suite #605, New York, New York 10007, as set forth in the Certificate of Incorporation.

Incorporators:

Margaret Bryant
Margaret Bryant

Barbara E. Pontier
Barbara Pontier

Clyde B. Rue
Clyde B. Rue

Deborah Lazarus
Deborah Lazarus

Glenn Pontier
Glenn Pontier

Thomas S. Rue
Thomas S. Rue

Jay Shames
Jay Shames

FINANCIAL STATEMENTS

UPPER DELAWARE UNITARIAN UNIVERSALIST FELLOWSHIP, INC.
Statement of Receipts and Expenditures
June 15, 1989, through June 17, 1990

Receipts:

Voluntary Contributions from Members	\$ 1,779.56
Fund raising activity ("Liberty Days" table)	81.95
Total Receipts	<u>\$ 1,861.51</u> =====

Expenditures:

Contributions to:	
Wayne County Habitat for Humanity	\$ 81.95
Community Action Commission to Help the Economy	25.00
U.U. Service Committee ("Guest at Your Table")	12.00
U.U. Service Committee (fellowship donation)	50.00
Operating expenses:	
Heat	540.00
Postage	196.00
Public Liability Insurance	148.00
Newsletter Photocopying	100.00
Newspaper Advertising	70.20
Check Endorsement Rubber Stamp	39.10
Fundraising Expense ("Liberty Days" display)	31.96
Candles	11.77
Total Expenditures	<u>\$ 1,304.82</u> =====

* * *

Statement of Assets and Liabilities
As of June 17, 1990

Assets:

Cash in Checking Account	\$ 796.02
Furniture and Fixtures	500.00
Total Assets	<u>\$ 1,296.02</u> =====

Liabilities:

Total Liabilities	0
-------------------	---

* * *

Statement of Assets and Liabilities
As of November 11, 1990

Assets:

Cash in Certificate of Deposit (matures 4/91)	\$ 1,000.00
Cash in Checking Account	124.37
Cash on Hand	25.00
Furniture and Fixtures	500.00
Total Assets	<u>\$ 1,149.37</u> =====

Liabilities:

Heat	\$ 90.00
Total Liabilities	<u>90.00</u> =====

