



Annual Report and
2008 Financial Statement

 **UTAH NATIONAL GUARD
CHARITABLE TRUST**



Utah National Guard

Charitable Trust

Dear Utah National Guard Charitable Trust Friends,

The Trust has created this annual report and financial statement to provide our donors and supporters with information to gauge our success as an organization. Over the past year, we have experienced some tremendous generosity from donors and corporate sponsors raising \$197,989.64 on behalf of the Trust.

We work hard to keep our operating costs low. This commitment ensures that the vast majority of donations are used exclusively to help those in need. In 2008, the Trust operated with less than one percent of donated funds being used for administrative costs. These rock-bottom operating costs are made possible by wonderful volunteers who continue to donate their personal time to support our Soldiers, Airmen, and their families.

We are pleased to share this information with you, and to express our gratitude, but numbers alone cannot adequately demonstrate how many lives were touched or how many children were blessed as they participated in events hosted by our Family and Youth Programs and they don't describe the comfort brought to spouses as they were flown to the bedside of their injured Soldiers.

We have some exciting stories to tell about how these donations have blessed the lives of individuals and families. Alongside the financials, we have included photos that help to tell the story of how much the Trust means to our Soldiers and Airmen. So on behalf of everyone who has been aided by the Trust, we thank you!

With kind regards,

Brigadier General Jefferson S. Burton
President & Board Chairman



Board *of Directors*

Brigadier General Jefferson Burton

Utah Army National Guard Assistant Adjutant General — Army

Brigadier General David Hooper

Utah Air National Guard Assistant Adjutant General — Air

Colonel Lawrence Schmidt

Utah Army National Guard Chief of the Joint Staff

Colonel Lynn Humphreys

Utah Army National Guard Chaplain

Lieutenant Colonel James Woodall

Utah Army National Guard State Staff Judge Advocate

Command Sergeant Major Bruce Summers

Utah Army National Guard State Sergeant Major

Administrative Assistant to the Board: Staff Sergeant Scott Faddis



Charitable Trust

2008 Contributors



\$30,000

Ralph L Wadsworth

\$24,000

Macey's

\$20,000

Tri West

\$15,000

Utah Pacific Bridge and Steel

\$10,400

Draper 10th Ward

\$10,000

Kennecott Utah Copper

\$8,000

Honorary Colonels Corps of Utah

\$7,500

Universal Industrial Sales

6,800

Salt Lake Bees

\$5,000

Gerber Construction
Larry H. Miller Charities

\$3,800

Merit Medical

\$2,000-2,500

A-Core Concrete Cutting
AMFAB
Clair Black
Dale Barton Agency
Kirton and McConkie
South Hills Middle School
Zions Bank

\$1,500

Hidden Peak Electric Co
Larsen Family Leasing LLC

\$1,000-1,400

Columbia Painting and Coatings
Construction Truck and Trailer
H. W. Lochner
Harper Concrete
Harris Rebar
Hertz Equipment Rental
Johnson Investment Advisory
Services
LD Bowerman Investments
Mammoet USA
Malmrose Heli-Service
McNeil Engineering
Michael Baker Jr.
R.C. Hunt Electric
Ralph and Peggy Wadsworth
Rasmussen Equipment Company
Redeemer Lutheran Church
Rocky Mountain Mechanical
Skyview Excavation and Grading
Stantec Consulting, Inc.
Western States Equipment Co.



\$750-775

CDR Painting
Salt Lake Community Action Program

\$500-550

American Legion Auxiliary
Burton Lumber
E & R Painting
FOR-SHOR CO
Grow Painting
GSH
Komatsu Equipment
LDSAGENTS
Lehi Block Company
NEWLECTRIC
Prince Yeaters and Geldzahler
Roscoe Weston Motels
Shelley and Company
Utah Commercial Contractors

\$300 or less

A and B Associates
ACE Landscape
American Dream
American Legion Spanish Fork #68
Anonymous Donor
Applebee's
Askwig Coachman
B & P Management
Ballard's Drive-Inn
CAN Surety
Daniel Lee Anderson Living Trust
Draper 10th Ward
Draper-Riverton Rotary Club
Granite Construction Company
Harwood Mechanical
Honorary Colonels Corps of Utah
Jerry Hamik
Linda Vancott

Mountain Land Rehab
Mountain States Fence
Peck's Painting
Peterbilt of Utah
Professional Painting
Rain For Rent
Ray Shuman and Sons
Renee Taylor
Richard Groth
Salt Lake Cement Cutting
Sampson
Savage Scaffold & Equipment
Stillwell & Associates
Tall Tree Administrators
Trailer Rental Company
Utah National Guard Recruiters
Wells Fargo Insurance Services



Basic *Needs*

The Utah National Guard Charitable Trust was established in 2005 as a 501(c)3 as a nonprofit entity. Since its creation, the Trust has disbursed more than \$250,000 among hundreds of families, typically to offset financial hardships incurred during deployment of their Service member.

Funds for the Trust have been provided by generous contributions from private donors and corporate partners.

Each year the Utah National Guard honors donors to the Trust at a special ceremony held in Draper, Utah. At this year's ceremony, MG Brian Tarbet personally recognized and thanked the individuals and organizations who have given funds to benefit the Trust.

Recently, the Trust was chosen as the top entity in the

Community Development category from among 16 medalists at the 2008 Best of State Awards Gala May 31.

Utah Guard members and families make significant sacrifices to answer the call of the Nation. Among these are financial hardships endured while the military member serves overseas away from his or her family.

Many of our Citizen-Soldiers experience dramatic reductions in income when they leave their civilian jobs and mobilize for full-time military service.

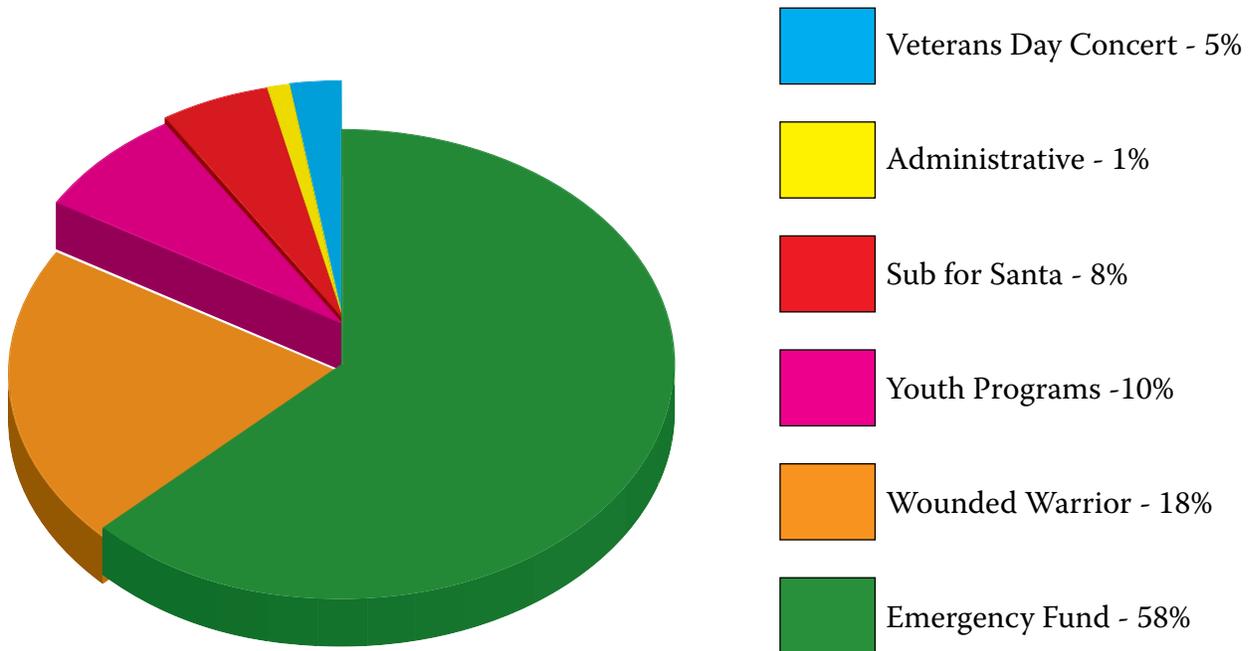
From the general fund of the Utah National Guard Charitable Trust, the Emergency Relief Fund provides assistance to Soldiers, Airmen and their families who find themselves in financial hardship.

Here are some examples of how Emergency Relief funds are used:

- To cover transportation to and lodging costs at a military treatment facility for the spouse of an Airman or Soldier, who has been seriously injured or wounded while on active duty overseas. Many charitable organizations arrange to donate frequent-flier miles for the spouse's airfare—and we make the effort to use this resource when possible—but this option is not always feasible.
- Families of Airmen or Soldiers deployed for combat or a military school often struggle with meeting basic needs due to the difference between their military and civilian salaries. In such cases the Trust will provide families in need with grocery gift cards, or a representative from Family Program will take them grocery shopping.
- Emergency home repairs represent a significant burden for the spouse of a deployed Airman or Soldier. Broken pipes, major appliance repairs, and unexpected car trouble are commonplace occurrences for military families. In many cases a member of the National Guard will perform the repairs so that the only cost to the Trust is for materials.



2008 Expenditures for *Airmen and Soldiers*





Impact *of the Charitable Trust*

An overwhelmed spouse called into a Utah National Guard Family Assistance Center. She explained that her large lawn was overgrown and the city was going to fine her because it violated an ordinance. She had several small children, but none that were old enough to help and no family close by. She had filed a claim with her insurance company, which picked up only a portion of the bill. The Charitable Trust was able to assist with the remainder so the entire claim was paid.

Due to a small mix-up, a Soldier's pay was delayed for a month. His wife worked and was able to pay the utilities, but not the rent. By the time the paycheck came, two months of rent was due, and Christmas was fast approaching. The Soldier knew that if the family wanted to stay in their apartment, it would be a meager Christmas for his wife and four children.

It was already late December, and the Soldier wasn't expecting much. One week before

Christmas, volunteers with the Charitable Trust showed up at his office with a truckful of items for his children, as well as gift cards for more gifts and food for Christmas dinner.

"It hit me in the heart pretty deep," the Soldier recalled, choking up at the memory.

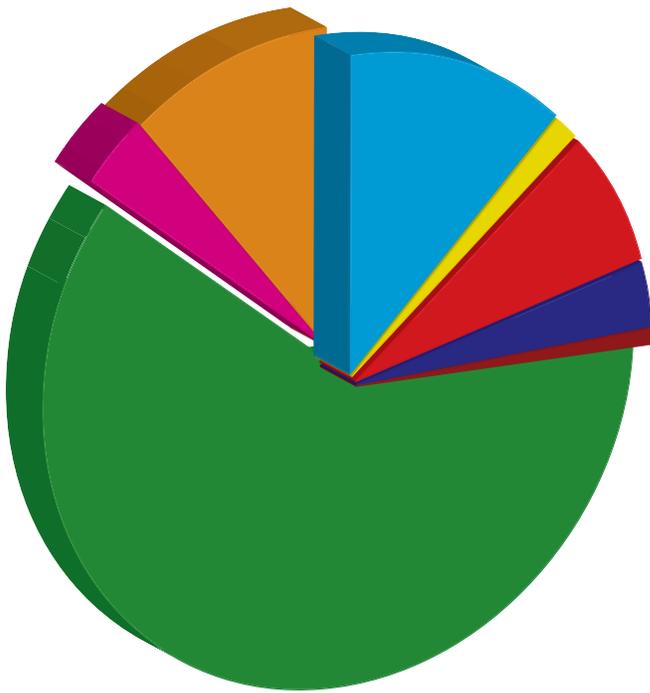
Though Christmas is a busy time, the Charitable Trust works year-round to help families of Service members.

The wife of a Soldier serving in Afghanistan didn't want to bother her husband with the problem of their front door becoming stuck, and she knew it was not likely to be fixed any time soon—that is, until a team of Air National Guardsmen showed up. They brought a new door and installed it for her free of charge, happy to help a fellow Guard members family.

Small acts like these, and much larger ones, are the miracles brought to Guard families every day by the Utah National Guard Charitable Trust.



Emergency *Relief Fund*



- Medical Bills - 1%
- Food - 7%
- Home Repairs - 4%
- Child Care - 2%
- Auto - 12%
- Utilities - 11%
- Other - 4%
- Mortgage or Rent - 61%



Wounded *Warrior*

When Soldiers are deployed, often their monthly military income is less than their civilian pay. This additional hardship makes it difficult for a spouse or parent to fly to where their wounded Soldier or Airman has been evacuated to recover from their injuries.

With a recommendation from a chaplain or commander families may apply for assistance. As a member of the trusts board,

Col. Lynn Humphreys, the state chaplain, has referred many families for help. He says each application is considered carefully, but the Charitable Trust can also act quickly in an emergency, securing transportation to an injured Soldier's side in a few short hours if needed.

"It's just been a godsend to so many, many people," Humphreys said.

One of our Soldiers was hurt in the line of duty and



sent to Germany and then to Fort Lewis, Wash. Funds from the Charitable Trust were used to purchase the airfare, hotel, and other expenses to send the Soldier's spouse to his bedside during his recovery.

In its four-year history, the Trust has given aid to more than 500 military families, fulfilling a critical role in easing the financial strains of those who sacrifice for their country.

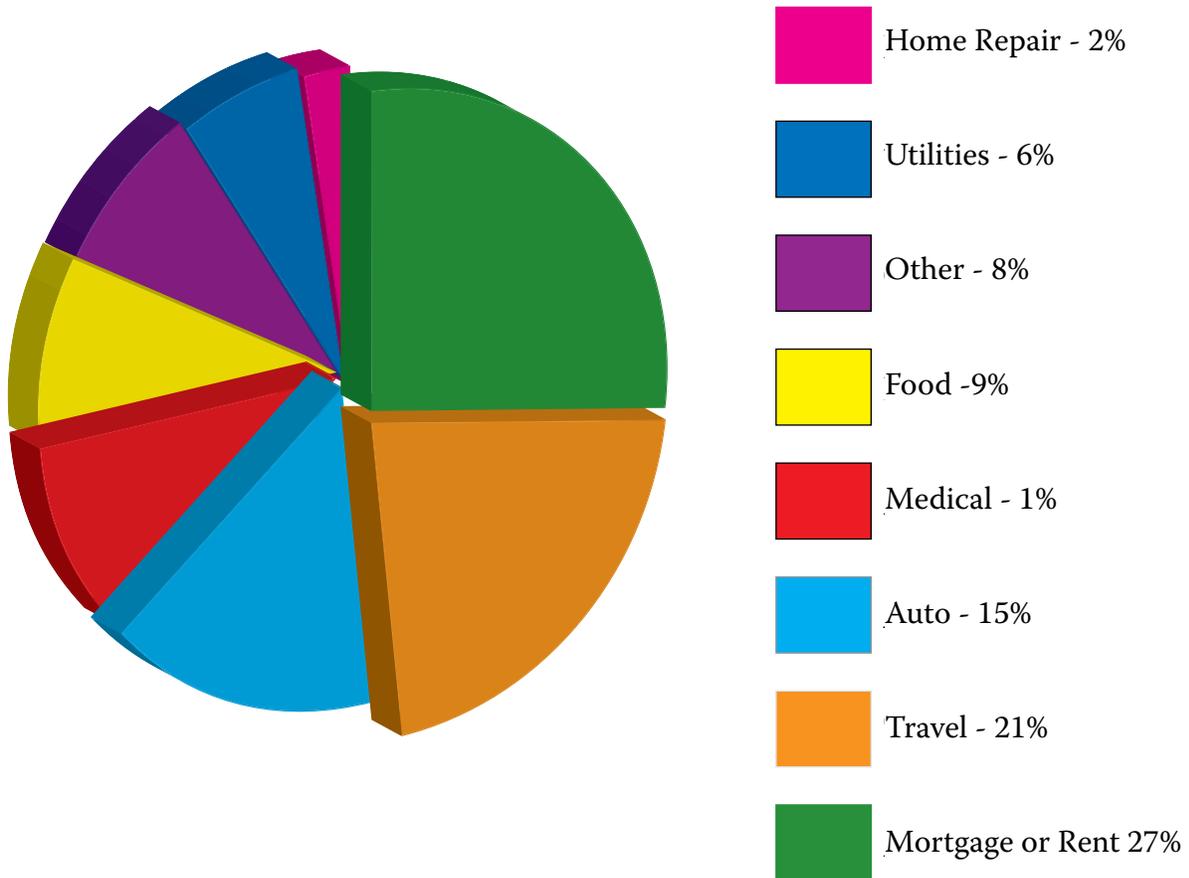
The Trust gives families who have exhausted all other available resources the ability to work their way to greater financial and emotional stability.

Volunteers who work with the Trust have given valuable counseling to military families in financial hardship. They have helped families reduce debt and eliminate unnecessary expenses, effectively giving them the tools they need to move toward self-reliance.



Wounded Warrior

Expenditures





Sub for Santa

Family Program

The Sub for Santa program has assisted families with holiday food, clothing and gifts.

“With the stress of the economy this year, people seem to be more reluctant to submit requests for help because they need more long-

term assistance,” said Tonia Johnson, Military OneSource Consultant.

Requests for clothing, diapers and food seem to be up compared to gifts of toys and electronics.

In 2006, the program helped 40 families. With 97

and 106 families being assisted in 2007 and 2008 respectively.

Both in-kind and monetary donations have been given directly to the Trust. Donations come from companies, families and individuals to provide Christmas for military families.





Great Utah Road Tour

Youth Programs

Charitable Trust funds often augment federal funds set aside for our Utah National Guard Youth Program. Guard children have unique challenges in comparison to those of their active-duty counterparts. Children living on or near a military base have numerous resources and benefits that are easily accessible. They live next door to other military

kids and attend school with other children in their same situation.

In the Guard, Soldiers and Airmen often live in remote locations and in many cases may be only one of a few residents in their city or town who are deployed with the military. Their children have few friends who can relate to their experience. When the

Youth Program was started in 2004, the Youth Leaders were asked what they needed most. Resoundingly, they said that they needed to be with and see other kids who were going through the same things that they were going through.

Our Youth Program has been built around giving National Guard kids the opportunity to come together

again and again to build a strong support network that will get them through these trying times. Without the Trust, our Youth would not get near the opportunities needed to make this happen. Through ongoing monthly and summer events such as camps and the Great Utah Road Tour, our young children and Youth Leaders get the opportunity to strengthen those bonds.





Trunk-or-Treat

Youth Programs

The Utah National Guard Family Program Office held its annual “Trunk-or-Treat” Halloween party at the Utah National Guard Headquarters on October 25. It was the fifth time for the yearly event and organizers estimate that it drew an audience of nearly 1,000 for the three-hour bash.

“Every year it has gotten bigger and bigger, and this year was the culmination of a lot of hard work,” said Kelly Barnes, State Youth Coordinator for the Utah National Guard. “Every year we do this before Halloween, and I have parents E-mail me saying that their kids enjoyed [the Trunk-or-Treat event] more than Halloween itself.”



Volunteers and staff hosted the event that featured several car trunks decorated for Halloween, with scary characters passing out candy to Guards-member’s children dressed in costumes. The purpose of the event was to bring Utah Army and Air Guard families together in a fun and safe environment to share a night of “trick-or-treating” together.



Several of the Utah Air National Guard's enlisted organizations sponsored trunks for the occasion.

"As junior enlisted members of the Utah ANG, we decided that it would be a worthwhile thing for us to come out and support the community and the families of both the Army and Air National Guard," said Tech. Sgt. Ali Chamberlain, a recruiter for the 151st Air Refueling Wing.



In addition to trunk-or-treating, the festivities included several bounce houses, other inflatables, a climbing wall, clowns, and free hot dogs and soda.

"I think it is a safe and secure environment for the kids. My kids are having a blast. They love the candy," said Tech. Sgt. Anthony Valdez of the 151st Communications Flight. "This is what it is all about: kids and costumes."



Veterans Day Concert

Heroes, Then and Now

The Utah National Guard celebrated its 52nd Annual Veterans Day Concert Nov. 10, 2007, at the University of Utah's Huntsman Center. The 23rd Army Band and the Granite School District's Combined High School Choir performed in an outstanding manner in honor of our Nation and its Veterans. The theme was "Heroes, Then and Now." Some of the favorite musical numbers included

"Do You Hear the People Sing," "Taps," "Battle Hymn of the Republic" and "The Star-Spangled Banner." These and many other selections allowed all in attendance to reflect on their freedoms and on the sacrifices required to enjoy them. The concert recognized all Soldiers, Airmen, Sailors, and Marines, and honored each of them for their service, many paying the ultimate sacrifice while answering our Nation's call.



Master Sgt. Sterling Poulson served as the master of ceremonies. He provided a perfect mix of both serious and lighthearted narration and commentary throughout the performance. Major General Peter S. Cooke was the concert's keynote speaker. In discussing current military operations, he emphasized the strength, dedication and commitment of both our military and their families in support of our Nation.





Fund Raising Event

Minuteman 5K Run/Walk



Through Ralph L. Wadsworth Construction's fundraising efforts, the 2008 Minuteman 5K Run/Walk was able to bring in more than \$125,000 for the Charitable Trust.

The 4th annual Minuteman 5K Run/Walk was held in August 2008 and helped create awareness for the Charitable Trust. Over the last four years there have been more than 1,400 participants in the race. This year's event attracted approximately 600 participants.



IRS

Determination Letter



INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

OCT 11 2006

Date:

THE UTAH NATIONAL GUARD CHARITABLE
TRUST
C/O L S MCCULLOUGH II
10 E SOUTH TEMPLE STE 900
SALT LAKE CITY, UT 84133

Employer Identification Number:
20-3694973
DLN:
17053094023046
Contact Person:
THOMAS M KALLMAN ID# 31383
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
October 17, 2005
Contribution Deductibility:
Yes
Advance Ruling Ending Date:
December 31, 2009

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

If you distribute funds to individuals, you should keep case histories showing the recipient's name and address; the purpose of the award; the manner of selection; and the relationship of the recipient to any of your officers, directors, trustees, members, or major contributors.

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)
Statute Extension



Part X Public Charity Status (Continued)

- e 509(a)(4)—an organization organized and operated exclusively for testing for public safety.
- f 509(a)(1) and 170(b)(1)(A)(iv)—an organization operated for the benefit of a college or university that is owned or operated by a governmental unit.
- g 509(a)(1) and 170(b)(1)(A)(vi)—an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.
- h 509(a)(2)—an organization that normally receives not more than one-third of its financial support from gross investment income and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).
- i A publicly supported organization, but unsure if it is described in 5g or 5h. The organization would like the IRS to decide the correct status.

6 If you checked box g, h, or i in question 5 above, you must request either an **advance** or a **definitive ruling** by selecting one of the boxes below. Refer to the instructions to determine which type of ruling you are eligible to receive.

a **Request for Advance Ruling:** By checking this box and signing the consent, pursuant to section 6501(c)(4) of the Code you request an advance ruling and agree to extend the statute of limitations on the assessment of excise tax under section 4940 of the Code. The tax will apply only if you do not establish public support status at the end of the 5-year advance ruling period. The assessment period will be extended for the 5 advance ruling years to 8 years, 4 months, and 15 days beyond the end of the first year. You have the right to refuse or limit the extension to a mutually agreed-upon period of time or issue(s). Publication 1035, *Extending the Tax Assessment Period*, provides a more detailed explanation of your rights and the consequences of the choices you make. You may obtain Publication 1035 free of charge from the IRS web site at www.irs.gov or by calling toll-free 1-800-829-3676. Signing this consent will not deprive you of any appeal rights to which you would otherwise be entitled. If you decide not to extend the statute of limitations, you are not eligible for an advance ruling.

Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code

For Organization

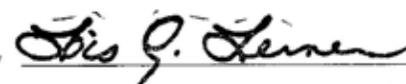

 (Signature of Officer, Director, Trustee, or other authorized official)

SCOT T. OLSON
 (Type or print name of signer)

GRANTOR
 (Type or print title or authority of signer)

MARCH 8, 2006
 (Date)

For Director, Exempt Organizations

By 
 (Signature)

Date OCT 11 2006
 (Date)

- b **Request for Definitive Ruling:** Check this box if you have completed one tax year of at least 8 full months and you are requesting a definitive ruling. To confirm your public support status, answer line 6b(i) if you checked box g in line 5 above. Answer line 6b(ii) if you checked box h in line 5 above. If you checked box i in line 5 above, answer both lines 6b(i) and (ii).
- (i) (a) Enter 2% of line 8, column (e) on Part IX-A, Statement of Revenues and Expenses.
- (b) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," check this box.
- (ii) (a) For each year amounts are included on lines 1, 2, and 9 of Part IX-A, Statement of Revenues and Expenses, attach a list showing the name of and amount received from each **disqualified person**. If the answer is "None," check this box.
- (b) For each year amounts are included on line 9 of Part IX-A, Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of line 10, Part IX-A, Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," check this box.

7 Did you receive any unusual grants during any of the years shown on Part IX-A, Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual. Yes No