

Promotional and Community Event Grant Application

Step 1

Important Information

- **Form Function Note:** In order to go back from a page in the form to a previous page, all required fields on the page must be populated.
- Please read the McKinney Community Development Corporation [Grant Guidelines](#) before completing this application.
- The Grant Guidelines are available on this website or by emailing Info@McKinneyCDC.org.
- A completed application and all supporting documents are required to be submitted via this application for consideration by the MCDC board.
- **Applications must be completed in full, using this form electronically, and received by MCDC by 5 p.m. on the application deadline indicated on the [Grants page](#) of this website.**
- If you are interested in a preliminary review of your grant request or event idea, please complete and submit the online [Letter of Inquiry](#).

Organization Information

Name	MillHouse Foundation
Federal Tax ID Number	83-3358144
Incorporation Date	1/15/2019
Mailing Address	610 Elm Street, Suite 1000
City	McKinney
State	TX
Zip Code	75069
Phone Number	2028102101
Email Address	aimee@millhousefoundation.org
Website	www.millhousefoundation.org
Facebook	https://www.facebook.com/millhousemckinney

Instagram @millhousemckinney

Twitter @millhousemckinney

LinkedIn *Field not completed.*

Please provide a detailed narrative about your organization including years established, mission, goals, scope of services, staff, successes, contribution to community, etc.

I.a. Mission

MillHouse Foundation is a 501(c)(3) tax exempt nonprofit corporation established in January of 2019 to promote small business women in creative fields. Our mission is for women to flourish by providing opportunities to showcase their work and enhance income opportunities.

I.b. Strategic Goal

Our goal as an organization is to provide opportunities for micro-business owners to not only grow skills, but showcase and sell their work, providing economic stability for their families and the surrounding community. Our focus is women, but all are invited to participate in our festivals and events.

I.d. Scope of Services

1) Talent Showcase: Community-focused festivals and events to showcase products and offer enhanced revenue opportunities to participants by increasing visibility and sales, attracting new customers, and enhancing creative collaboration. Programs include art and artisan festivals and events.

2) Spotlight: Showcase work through gallery exhibits, public art, and media promotion. Enable participants to share insights, ideas and expertise, build meaningful connections, allow participants to sell their work. Programs include gallery exhibitions, public art murals and open studio tours.

3) Collaboration: Grow creative impact through collaborative projects and activities. Programs include the Texas Art and Music Guild's McKinney Art Studio Tour, City-sponsored Arts in Bloom art demonstrations, and artist-led group collaborations.

I.e. Staff and Volunteers

MillHouse Foundation Staff: Beth Beck, PhD, Executive Director, Volunteer; Dana Brock, Art Director, Consultant; Aimee Woolverton, Creative Services, Consultant
Volunteers: Gail Delger, Lisa Temple, Andrea Holmes, Valerie Batchelder, Lisa Moore, Celeste Seitz, Robin Pedrero, Alli Koch

I.f. Successes

We've hosted eight multi-day fine art festivals at the McKinney Cotton Mill since 2019: August 2019, February 2020, February 2021, August 2021, February 2022, August 2022, February 2023, August 2023. We expanded ArtFest in 2023 to include the Atrium Hallway at the McKinney Cotton Mill.

For artisans, we've hosted three two-day outdoor Makers Markets in 2020 at a time when all festivals were canceled. We reinstated Makers Market in 2023 with one-day indoor events in July, September, December in the Atrium Hallway. Each festival and market was at capacity.

For muralists and musicians, we've hosted two-day outdoor mural festivals on the south lawn of the Cotton Mill in 2022 and 2023. The first event included a celebrated cellist performing on the Friday evening VIP reception and a solo guitarist throughout the festival weekend. This summer, the second MuralFest featured a full sound stage lineup with solo performers, trios, and full bands on stage in the Tupps facility adjacent to the festival grounds. We've hosted 27 artists over the last two years to paint permanent exterior murals on the Cotton Mill facility. In addition, we hosted ten mobile muralists who painted 48x60 in canvases, which were auctioned to the public. We are planning to expand MuralFest in 2024.

I.g. Contribution to community

We believe the creative micro-business owners in the community, who participate in MillHouse events, help fuel our local economy. As their income-potential rises, so does the community as they invest their well-earned dollars at the local grocery stores, gas stations, restaurants, schools, and other local establishments.

We invite local, regional, and international creatives to engage and participate in MillHouse programs, with the intention of building and sustaining a vibrant, creative, prosperous community atmosphere to attract new visitors, residents, businesses, artisans, and foodies to the historic Cotton Mill Arts District.

We also offer the community an opportunity to come meet artists, makers, and muralists at each of our events, including our participation in the McKinney Art Studio Tour and artist demos at the City's Arts in Bloom festival. In addition, families and friends can enjoy our outdoor mural festival with food, music, and activities for the kids.

Organization Type Nonprofit - 501(c) (Attach a copy of IRS Determination Letter)

IRS Determination Letter [MillHouseTaxExemptLetterID17260 .pdf](#)

Noteworthy recognitions or awards in the last two years. We feel honored to have received grant awards from Visit McKinney, McKinney Arts Commission and MCDC. Beth Beck was thrilled beyond measure to be nominated for the MCDC Quality of Life Award.

Representative & Contact Information

Representative Completing Application:

Name Aimee Woolverton

Title Marketing and Grants Director

Mailing Address 610 Elm Street, Suite 1000

City McKinney

State TX

Zip Code 75069

Phone Number 2028102101

Email Address aimee@millhousefoundation.org

(Section Break)

Contact for Communications Between MCDC and Organization:

Name Aimee Woolverton

Title Marketing and Grants Director

Mailing Address 610 Elm Street, Suite 1000

City McKinney

State TX

Zip Code 75069

Phone Number 2028102101

Email Address aimee@millhousefoundation.org

Project Information

Funding - Total Amount Requested 13950

Are matching funds available? No

Will funding be requested from any other City of McKinney entity (e.g. Visit McKinney, Arts Commission, City of McKinney Community Support Grant)? Yes

Provide name of City of McKinney entity funding source and amount. McKinney Arts Commission - \$15,000
Visit McKinney - \$4,950

Have you received or will funding be requested from other organizations / foundations for this event(s)? Yes

Provide name of organization / foundation funding source and amount. HEB - \$5,000 for Muralfest

Has a request for funding for this Promotional / Community Event been submitted to MCDC in the past five years? Yes

Please list. 2022, 2023

Board of Directors Beth Beck, PhD
Aimee Woolverton
Dana Brock
Gail Delger

	Lisa Temple Andrea Holmes
Leadership Staff	Beth Beck, PhD Aimee Woolverton Dana Brock
Board of Directors Attachment	<i>Field not completed.</i>
Leadership Staff Attachment	<i>Field not completed.</i>

Promotional / Community Event Information

Information provided for promotional / community event for which you are seeking funding.

Date(s) of Event	MillHouse Indoor Makers Markets, January 13, March 9, April 13, May 11, July 13, September 14, October 12, November 9, and December 14, 2024 Winter Indoor ArtFest, February 24-25, 2024 Outdoor MuralFest, June 1-2, 2024 Summer Indoor ArtFest, August 24-25, 2024 International Postcard Art Exhibit, September 28, 2024
Ticket Prices	All events are free admission
Describe the target attendee for the event(s)?	1. Art patrons from state and beyond; 2. Regional artists and creatives; and, 3. Citizens looking for family friendly activities.
Is this the first time for this event?	No
If not, what is the history for the event (beginning in what year and how often is event held)?	ArtFest began in 2019 and has been held every February and August except for August 2020 (COVID), Makers Market began in September 2020 and has been held 5 times. MuralFest began in 2022 and was repeated in 2023.
How will the event showcase McKinney for tourism and / or business development?	At MillHouse, we're in the business of micro-business development. MillHouse festivals and events enable local and regional creatives, who own an impressive range of sole proprietor businesses, to earn income and grow their client base. MillHouse generates local economic impact by keeping the sales and tourism tax dollars local; and contributes to

McKinney's reputation as a cultural destination. McKinney Community Development Corporation cell phone data indicates that 70% of our festival attendees come from outside McKinney and visit McKinney establishments downtown both before and after they attend MillHouse events.

We have a successful history of well-attended events, with close to 12,000 participants over the previous thirteen events. Many are repeat visitors who are drawn to our unique venue in a gateway historic McKinney property, The Cotton Mill, on Highway 5 at the entry to the east McKinney redevelopment zone. Because of the quality and diversity of art at our festivals, corporate executives, interior designers, and other businesses represent some of the patrons who attend and buy.

We promote our art and mural festivals as two-day destinations where attendees can "come and go" throughout the weekend, mingled with visits to local shops, restaurants, historic buildings, and the many outdoor parks that McKinney has to offer. MillHouse festivals, markets and events help promote the City of McKinney as a cultural arts destination for weekend travelers.

Expected attendance	11,000 people across 13 events
Expected number or percentage of attendees coming from outside McKinney	70%
Location(s) of event(s)	McKinney Cotton Mill
Does the event support a non-profit (other than applicant)?	No
What percentage of revenue will be donated(indicate net or gross)?	N/A - however, we provide stipends for our artists who lead our festivals and events, and for the muralists and musicians who participate in MuralFest.
Provide a detailed narrative of the event(s) including mission, goals, activities, schedule, production	MillHouse festivals are large-scale arts events focused on providing an engaging space for the community to interact with artists in one of the 65+ booths that are a part of these indoor and outdoor events. The artisan Makers Markets can host up

timeline, goals for growth / expansion, etc.

to 34 vendors to each event. MuralFest invites the community to enjoy muralists painting murals at the Cotton Mill over the weekend, with a full line of musicians performing. Each festival and event offers us the opportunity to showcase the historic Cotton Mill in McKinney.

Mission/Goals/Expansion

The mission and goals for these activities are the same as for the organization as a whole. We're expanding the number of Makers Markets from three in 2023 to nine in 2024, and the MuralFest event from a two-day festival to a four-day event for the participating muralists, including mural mentor sessions with MillHouse studio artist Alli Koch of Alli K Designs. MuralFest will continue as a two-day festival with a full music stage line-up, following the two-day head start the muralists have on the large exterior murals. In addition, we're erecting a large temporary wall on the south Cotton Mill lawn for up to ten muralists.

Schedule

Planned Activities: Free Admission to all
Makers Market, January 9, 2024 (10 am - 4 pm)
The Cotton Mill Atrium Hallway
Estimated attendance: 500
Participating artists: 25+

Winter Indoor Festival, February 24-25, 2024 (11am-5pm each day)

- The Cotton Mill, Grand Hallway, Atrium Hallway, and Wedding Venue
- Estimated attendance: 2500
- Participating artists: 65+

Makers Market, March 9, 2024 (10 am - 4 pm)
The Cotton Mill Atrium Hallway
Estimated attendance: 500
Participating artists: 25+

Makers Market, April 13, 2024 (10 am - 4 pm)
The Cotton Mill Atrium Hallway
Estimated attendance: 500
Participating artists: 30+

Makers Market, May 11, 2024 (10 am - 4 pm)

The Cotton Mill Atrium Hallway

Estimated attendance: 500

Participating artists: 30+

Mural Festival, June 1-2, 2024 (11am-5pm each day)

- The Cotton Mill, Cotton Mill South Grounds and Dye Room

- Estimated attendance: 750-1000

Music Sound Stage with 10 bands

- Participating artists: 10-15 artists for semi-permanent mural on exterior location (each artist receives a stipend), 10-20 artists with stand-alone temporary murals available for auction.

Makers Market, July 13, 2024

- The Cotton Mill Atrium Hallway

- Estimated attendance: 500

- Participating artists: 30+

Summer Indoor Festival, August 24-25, 2024 (11am-5pm each day)

- The Cotton Mill, Grand Hallway, Atrium Hallway, and Wedding Venue

- Estimated attendance: 2500

- Participating artists: 65+

Makers Market, September 14, 2024

- The Cotton Mill Atrium Hallway

- Estimated attendance: 500

- Participating artists: 30+

International Postcard Art Exhibit (formerly the Twitter Art Exhibit), September 28, 2024

- The Cotton Mill Atrium Hallway

- Estimated attendance: 250

- Participating artists: 1000+

Makers Market, October 12, 2024

- The Cotton Mill Atrium Hallway

- Estimated attendance: 500

- Participating artists: 30+

Makers Market, November 9, 2024

- The Cotton Mill Atrium Hallway

- Estimated attendance: 500

- Participating artists: 30+

Makers Market, December 14, 2024

- The Cotton Mill Atrium Hallway

- Estimated attendance: 500

- Participating artists: 30+

Production schedule

Our production timeline is year-round. For each ArtFest in Winter and Summer, we discuss needed changes or updates to be implemented then open applications for the next ArtFest. We begin social media posts 60-90 days in advance of each event. Makers Markets are on a quicker cadence for planning and social media and require social media posts 45 days in advance, if possible. We opened applications in October for the 2024 season. We start planning each MuralFest immediately following the lessons learned session with the team after the event, and plan for the following Summer. We open applications in January for the June event.

Specific Marketing Plans and Budget

Provide a detailed marketing plan and budget for the event(s). Plan should also include promotional channels (print ads including publication names, social media, radio, posters, flyers, yard signs, etc.).

We're including an attachment with the plan. Below is a synopsis of the marketing expenditures.

Print ads monthly in Community Impact Magazine - 1/8th size page ad - Budget: \$9,000

Paid Facebook and Instagram ads leading up to each event - \$5,850

Strategic signage: including flag signs & banners, including 14 ft sign outside of the Cotton Mill at Elm and Hwy 5. Budget: 0 (all signs have already been purchased)

Media Content and Design - Curated strategy, creation, and design all of the social media content, including festival webpages, photography, graphics, descriptions, links, etc. Budget: \$8,500

Brand package for artists to use to promote festivals. Budget: \$0

Attach marketing plan

[MillHouse Foundation Marketing Plan Template.pdf](#)

Total Promotional Budget

\$23,400

What percentage of the total marketing budget does the grant represent?

59%

Marketing lessons learned from past (what worked and what did not).

Social media and Instagram reels can be shared and reposted by the participating artists and interested shoppers. Digital media and print ads work well and offer statistics on viewership. Printed flyers and cards are costly and create waste.

How will you measure success of your event(s) and marketing campaign? (attendance, website hits, social media indicators, etc.)	Attendance. Artists' anecdotal evidence from sales. Website hits. Social media campaign reports. Community Impact print and online media reports.
Please include examples of past marketing efforts (screen shots of ads, posters, social posts, radio text, etc.)	We have included this as an attachment.
Additional details related to marketing efforts.	<i>Field not completed.</i>
Budget	MillHouse Foundation Festival Budget 2024.pdf
What percentage of Project / Promotional / Community Event funding will be provided by the applicant?	55%
Are matching funds available?	No
What dollar amount and percentage of Promotional / Community Event funding will be provided by other sources such as sponsorship, registration fees, individual or corporate donations, etc.?	
Sponsorship Revenue	0
Registration Fees	62,225 - 81%
Donations	\$14,500 potential donations 19% not included in the budget. We have secured \$5,000 of this from HEB
Other (raffle, auction, etc.)	0
Net Revenue	-\$13,573 (Note if we receive all possible donations, Net Revenue is \$927)
Metrics to Evaluate Success: Outline the metrics that will be used to evaluate success of the proposed Promotional /	Strategic Economic Objectives and Metrics: Host at least one event per month at the McKinney Cotton Mill featuring local and regional creatives. Metric: Complete the planned festivals and events in a timely manner.

Community Event. If funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

Leverage print and digital media markets to increase awareness of McKinney as a weekend destination.
Metric: Plan monthly Community Impact ads, send press releases to local and regional media outlets, and post social media for all festival participants.

Financial Goals of Promotional / Community Event

Gross Revenue	\$62,225
Projected Expenses	\$75,798
Net Revenue	-\$13,753 (without donations)
Other Funding Sources	<i>Field not completed.</i>

Financial Status of Applying Organization

- Provide an overview of the organization's financial status including the projected impact of the event(s) on the organization's mission and goals
- Please attach your budget for the current year and audited financial statements for the preceding two years. If audited financials are not available, please indicate why and attach a copy of the 990 filed with the IRS.

Budget	MillHouse Foundation Budget 2023.pdf
Financial Statements	MillHouse Foundation 2022 Tax Return.pdf
W9	W9 MhF 2023.pdf
IRS Determination Letter (if applicable)	MillHouseTaxExemptLetterID17260_1.pdf
990 Filed with IRS (if applicable)	<i>Field not completed.</i>

Presentation to MCDC Board of Directors

Completed applications that are eligible for consideration by MCDC will be presented to the board according to the schedule on the [Grants page](#) of this

website. Presentations will be limited to five (5) minutes followed by time for Board questions. **Please be prepared to provide the information outlined below in your presentation:**

- Summary of organization and goals
- Summary of event(s) to include dates, location, ticket prices, target audience, how your event will showcase McKinney, estimated attendance from within and outside of McKinney (and past attendance, if applicable), event features / activities, how event supports your organization's mission, and non-profit beneficiary, if applicable.
- Specific marketing plans for event(s) including promotional channels to be utilized (print, radio, social media, posters, etc.) and budget for each. Please share the percentage of the total marketing budget that this grant application represents.

Acknowledgements

If funding is approved by the MCDC board of directors, applicant will assure:

- An application is considered complete when it is submitted on time and when it contains all information in this application.
 - The Promotional / Community Event for which financial assistance is sought will be administered by or under the supervision of the applying organization;
 - All funds awarded will be used exclusively for advertising, marketing and promotion of the Promotional / Community event described in this application.
 - MCDC will be recognized in all marketing, advertising, outreach and public relations as a funder of the Promotional / Community Event. A logo will be provided by MCDC for inclusion on all advertising, marketing and promotional materials. Specifics for audio messaging will be agreed upon by applicant and MCDC and included in an executed performance agreement.
 - The organization's officials who have signed the application are authorized by the organization to submit the application.
 - Applicant will comply with the MCDC Grant Guidelines in executing the Promotional / Community Event for which funds were received.
 - Applicant gives permission for the use of Board presentation images and other published event images on MCDC and City of McKinney website and social media content and print/digital publications.
 - Applicant will provide a final report of the Promotional/Community Event(s) no later than 30 days following the completion of the Promotional/Community Event(s). Applicant may choose to use the online form for Final
-

Report found [here](#) or email Final Report to info@mckinneycdc.org. If emailed, Final Report may be in any format. All Final Reports should include: narrative report on the event(s), goals and objectives achieved based on performance metrics outlined in the application, financial data (budget vs. actual expenses and revenues along with explanation for variances, amount donated to charity (if applicable), samples of marketing efforts (images of printed materials and ads, screenshots of website and online promotions), and photos and/or video of the event(s).

- Grant funding is provided on a reimbursement basis subsequent to submission of a reimbursement request, with copies of invoices and paid receipts for qualified expenses. Up to 20% of the grant awarded may be withheld until the **final report on the Promotional/Community Event is provided to MCDC.**

Applicant Electronic Signature	Selecting this option indicates your agreement with the above statement.
Chief Executive Officer	Beth Beck
Date	11/29/2023
Representative Completing Application	Aimee Woolverton
Date	11/29/2023

Notes

- *Incomplete applications or those received after the deadline will not be considered.*
- *A final report must be provided to MCDC within 30 days of the event / completion of the Promotional / Community Event.*
- *Final payment of funding awarded will be made upon receipt of final report.*
- *Please use the Final Report to report your results. A PDF version is also available.*



Marketing Plan - 2024

Mission, values, and vision

MillHouse Foundation is a 501(c)(3) tax exempt nonprofit corporation created to promote female artists and entrepreneurs through meaningful connections, social and educational activities, and access to shared resources to create social, creative, and economic impact in the local community. The organization believes that when women flourish, so do their families and extended communities. MillHouse Foundation partners with her sister organization, MillHouse McKinney, to provide female artists and creatives access to private and open studios, co-working and social space, workshops and classes, and member resources; while focusing efforts on program priorities.

MillHouse Foundation's top program priorities are:

- 1) Talent Showcase - community-based festivals, markets, and events to offer enhanced revenue opportunities for local and regional creatives by increasing visibility and sales, and attracting new customers;
- 2) Art/Product Spotlights: opportunities to highlight creative work through Gallery exhibits, Public Art, and social media promotions; and
- 3) Collaborative projects to elevate creative expression working with McKinney creatives and organizations.

Each of these priorities offer creative, entrepreneurial women the opportunity to learn, grow, collaborate, and showcase their ideas, products, and services.

Our core beliefs are centered on the following guiding principles:

- 1) Every woman is an entrepreneur at heart, awaiting encouragement, guidance, and resources to awaken and flourish.
- 2) Contributions by small business women deserve elevation, recognition, and resources.
- 3) Women, as artists and entrepreneurs, create economic impact with social benefits

Marketing Goals and Objectives

1. Increase Event Attendance

Boost festival/event attendance during 2024. We will do this by increasing our ads in Community Impact. In previous years, we ran ads only the month before each event. In 2024 we plan to run ads every month, therefore increasing brand awareness and ultimately event attendance. In addition, we will continue with targeted social media ads.

2. Boost Social Media Engagement

Increase the social media engagement for MillHouse festivals/events in 2024 adding more video content.

3. Enhance Sponsor Relations

Secure sponsorships by leveraging volunteers specifically tasked with reaching out to potential event sponsors.

4. Increase Search Engine Ranking

By the end of the year, we want to increase our search results page position for our main brand-related keywords to drive more organic traffic. Currently MillHouse Foundation ranks 4th in McKinney searches on Google for McKinney Art Festivals. Our goal is to increase this by one spot in 2024. Additionally, we would like to rank on the first page of Google searches for art festivals in the Dallas area. We will do this by adding more specific key words on our website and social media posts.

The team

- Aimee Woolverton, Creative Services Director creates social media content and posts for all festivals and events, as well as directing social media and print advertising.
- Beth Beck, PhD creates social media for MillHouse Foundation brand awareness
- Celeste Seitz works to secure sponsorship partners for festivals and events.

Target audience persona(s)

1. Art patrons from state and beyond with disposable income - typically between the ages of 30-60
2. Regional artists and creatives
3. Citizens looking for family friendly activities

Channels and tactics

- Email newsletters
- Social media including Facebook/Instagram ads
- Website
- Print advertising
 - Paid advertising in Community Impact Magazine
 - Free advertising via event submissions in regional and statewide publications, including Texas Monthly, Texas Highways, AARP, and The Dallas Morning News

Budget and resources assessment

MillHouse Foundation currently has no marketing budget to allocate to staff or direct advertising. All marketing funds come from local grants.

2024 Season Budget - MillHouse Foundation			
MURALFEST 2024			
REVENUE			In-Kind
	(35 applications @\$25)	\$875	
	Vendor applications and booth fees	\$1,875	
	mobile mural sales	\$1,000	
REVENUE TOTAL		\$3,750	
EXPENSES			
	2 Part-time Artist Festival coordinators	\$4,000	
	MuralFest Artist stipends	\$12,000	
	Live Musicians	\$3,000	
	MuralFest Artist supplies	\$5,900	
	Porta-Potty rental	\$800	
	Audio Equipment Rental	\$250	
	OutdoorEvent/Security	\$1,000	
	Cleaning		\$300
	Event Insurance	\$350	
	Porter fee		\$200
	Outdoor Facility		\$1,000
	Artist signs for murals	250	
	Sponsor Boards	250	
	Marketing	\$2,675	
	EXPENSES SUBTOTAL	\$30,475	\$1,500
WINTER AND SUMMER ARTFESTS 2024			
REVENUE			In-Kind
	Artist Applications	\$3,125	
	Artist Booth Fees	\$29,500	
REVENUE TOTAL		\$32,625	
EXPENSES			
	2 Part-time Artist Festival coordinators	\$8,000	
	Live Musicians	\$1,800	
	Cotton Mill Facility Rental		\$6,000
	Volunteer and participant food/drinks	\$680	
	Event/Security	\$3,000	
	Event Insurance	\$398	
	Cleaning		\$600
	Porter fee		\$400
	MARKETING	\$5,350	
	EXPENSES SUBTOTAL	\$19,228	\$7,000

INDOOR MAKERS MARKET 2024 (10 planned)		
REVENUE		
		In-Kind
Artist Applications (250 at \$25 each)	\$6,250	
Artist Booth Fees	\$14,000	
REVENUE TOTAL	\$20,250	
EXPENSES		
Part-time Artist Festival coordinator	\$7,500	
Cotton Mill Facility Rental	\$1,400	\$0
Event Insurance	\$1,270	
Event/Security	\$0	
Cleaning		\$900
Porter fee		\$600
MARKETING	\$11,000	
EXPENSES SUBTOTAL	\$21,170	\$1,500
TWITTER ART EXHIBIT		
REVENUE		
		In Kind
Original Art Cards sales - estimate of MillHouse percentage	\$5,600	
EXPENSES		
Part-time Artist Exhibit Curator	\$1,000	
Display boards	\$300	
Marketing	\$1,175	
Art Book Design	\$500	
Print media	\$150	
Signs	\$200	
Supplies	\$100	
Live Musician	\$350	
Volunteer and participant food/drinks	\$600	
Event insurance	\$250	
Event security	\$300	
Cotton Mill Facility Rental		\$750
Cleaning		\$90
Porter fee		\$60
EXPENSES SUBTOTAL	\$4,925	
Total MillHouse Foundation 2024 Revenue	\$62,225	
Total MillHouse Foundation 2024 Expenses	\$75,798	

Past promotions

MILLHOUSE MURALFEST 2023 SOCIAL MEDIA CONTENT CREATION INSTAGRAM REELS INSIGHTS



996

Accounts Center accounts reached ⓘ

Post interactions ⓘ

78 likes

2 comments

3 saves



468

Accounts Center accounts reached ⓘ

Post interactions ⓘ

43 likes

2 comments

1 save

MILLHOUSE MURALFEST 2023 SOCIAL MEDIA CONTENT CREATION COMMUNITY IMPACT



Jun 1, 2023 - Jun 30, 2023

ADVERTISER IMPACT REPORT



TOTAL MAILBOXES
78,699



PRINT READERSHIP
121,983



DIGITAL IMPRESSIONS
30,080



TOTAL REACH
152,063

MCKINNEY IN-PAPER

IN MAILBOXES: JUN 23 SPEND: \$600 CIRCULATION: 78,699 READERSHIP: 121,983



Residences: 78,699
Average Age: 44.8
% with Children: 44.0%
Average Income: \$105,299



Eight
Page 13

MCKINNEY WEBSITE

START DATE: MAY 5 SPEND: \$300 IMPRESSIONS: 30,080 VIEWABLE IMPRESSIONS: 11,265
END DATE: JUN 4



Report Generated Date: Jun 23, 2023

Clicks: 32

Click-Through Rate: 0.11%

Viewable Click-Through Rate: 0.26%



Arts and Music Guild

Nonprofit acts as umbrella for creative programs in McKinney

BY COLBY FARR

The Cove, an art studio located at 402 Tennessee St. in downtown McKinney, offers one piece of the picture that makes up the community's Arts and Music Guild.

Several other programs operate under the nonprofit organization's umbrella, including McKinney Art Studio Tour, McKinney Plein Air Society and Summer Music Intensives. The guild is operated and maintained by volunteers, including its co-founder and Director Annie Royer.

"This is all volunteer [work]," Royer said. "There's no paid staff at the guild."

A group of artists met initially at artist Leo Malboeuf and his wife's house in 2010 to discuss how a new arts nonprofit could benefit the community. Royer and co-founder J.C. Tobey worked on the legalities of building the organization, and board members were chosen for experience in nonprofit management.

The guild received its 501c-3 status in 2011.

"The whole idea was that [the guild] is an umbrella organization for good ideas and programs," Royer said.

Those programs start organically based on the

interests and needs of artists. Each program has its own leadership, committee and budget. Under the guild board's guidance, each program can develop with independence and flexibility.

Each program also has its own funding source. "There's no membership dues," Royer said. "There used to be, but no more. Instead, each program has some fees to participate."

The guild tries to pay its artists for the work they do while offering as many inexpensive opportunities as possible for creative people to get their work in front of the public, Royer said. For example, artists can pay to have a solo show at The Cove, which hosts about 40 shows a year.

Before The Cove, Royer said there wasn't a place in McKinney for artists and musicians to hang out and share ideas. The venue features a seating area for people to gather during shows.

When people ask how they can get involved with The Cove, she tells them there's usually a waitlist to have art displayed, but a big part of being a guild member is being part of the community, she said.

"Until we find a spot for you on the wall, why don't you just come hang out and get to know us?" Royer said.



From left, artist Leo Malboeuf and Guild Director Annie Royer pose at The Cove on May 6.

UP COMING EVENTS

McKinney Summer Music Intensives

The camp offers instruction in various styles of music through coaching, assemblies and performance.

July 24-30 | Trinity Presbyterian Church, 5827 Virginia Parkway, McKinney
www.mckinneyartsandmusicguild.org

McKinney Plein Air Society



On the first Saturday morning of each month, artists meet at locations in McKinney and the surrounding area to paint while outside.

June 3 | 8am-7pm | Park 6 in Sherman, Texas
www.mckinneyartsandmusicguild.org/post/mckinney-plein-air-artists-meet

Arts and Music Guild

artsandmusicguild@gmail.com
www.artsandmusicguild.org

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"Senior living in a wonderfully unique residential-style community"

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Handicap accessible units are available. Security and maintenance services provided. Community center with recreational center and lounge building.

EMERALD COTTAGES

visit **McKinney**

McKinney Arts Commission

MCDC
McKINNEY COMMUNITY DEVELOPMENT CORPORATION

MillHouse

MILLHOUSE FOUNDATION AND THE MCKINNEY COTTON MILL PRESENT

MILLHOUSE MURALEST 2023

FEATURING LIVE MURAL PAINTING, LIVE MUSIC, LOCAL FOOD AND DRINKS

JUNE 3-4, 2023
10 AM - 4 PM
721 ANDERSON ST. MCKINNEY

Festival located between TURPPS and the Cotton Mill



Trick or Treat Trail at Towne Lake

The McKinney Parks and Recreation Department hosted the Trick or Treat Trail at Towne Lake Park on Oct. 21. The event included trick-or-treating as well as costume contests in various categories and live music.

- 1 Candy at the Trick or Treat Trail was distributed by vendors.
- 2 The Trick or Treat Trail event included trick-or-treating booths located around the park's 1.2-mile trail.



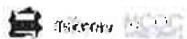
Pumpkin Dunk

The event, held Oct. 22 at the Apex Centre, offered a chance for attendees to jump in the pool and swim through a floating pumpkin patch. The Pumpkin Dunk event welcomed attendees of all ages and also included a dedicated special needs hour.

- 1 Attendees of the event swam in the Apex Centre's indoor pool to collect their pumpkins.
- 2 After selecting a pumpkin, attendees visited provided decoration stations to decorate their pumpkin and collect other provided treats.

MillHouse
MAKERS
Market

at the McKinney Cotton Mill



www.millhousefoundation.org/makers-market

30+ LOCAL ARTISANS

FREE ADMISSION

Food & Beverages available from White Box Roastery

610 Elm Street, Suite 1000, 75069
(inside the Cotton Mill Atrium Hallway)

Saturday, December 9th
10am to 4pm



McKinney City Council looking at strategies to help mitigate housing costs for east side

BY SHELBE HAMILTON

McKinney City Council is considering solutions to protect east side residents from rising housing costs.

Council received a report on the Neighborhood Preservation Study initiative during a winter work session. The initiative began in early 2021 to address concerns of rising housing costs due to surrounding development projects in the city's five historic east side neighborhoods: La Loma-Lively Hill, Lewisville, Mouszon-Central, Rockwall and Wilcox.

The study, conducted by independent consultants Economic & Planning Systems, evaluated relevant information, such as ownership data, the condition of residential and commercial properties in the area, average home sale price, and more. The study concluded the roughly 3,500 residents of the affected neighborhoods are particularly vulnerable to displacement when compared to the rest of McKinney. About 56% of surveyed residents also indicated they intend to remain in their home for 10 or more years, according to the report.

"The Neighborhood Preservation Study came about in an effort to make sure that the residents that wanted to remain in their homes were able to do so," said Janay Tiekem, director of the housing and community development department.

The report also noted east side residents are more diverse, have significantly lower median household incomes and are growing as a population at a slower rate than the rest of the city. The affected neighborhoods have also seen a significant increase in the median home sale price since 2010, according to the report.

The report included feedback collected from 173 east side residents who indicated they are facing financial challenges and are interested in financial

assistance programs for things, such as home repairs, down payments, utility payments and more, according to the report.

The presentation given to council at the meeting by representatives of Economic & Planning Systems outlined various strategies, policies and tools that could be implemented to help mitigate the impact of development on east side residents. Proposed solutions include implementing a community land trust, creating or expanding an existing tax increment reinvestment zone, and bolstering the city's housing rehabilitation program. These tools target costs incurred by property taxes, house repairs and more, and are intended to provide financial relief.

Council members expressed concerns regarding the use of a community land trust, citing potential issues in implementing the tool for homes being rented out or being passed through generations of family members. Council Member Geri Feltus noted her desire for this strategy to retain home ownership for residents passing their property to the next generation.

"One of the best ways to increase generational wealth is to pass on home ownership, so I would like to see us really reach for that better as we're creating these policies," Feltus said.

Council also noted concern about how to protect residents who are renting their east side homes. About 60% of residents in the affected neighborhoods rent their homes, according to the report. Various council members expressed interest in learning more about how the tools would protect renters and home occupants, as opposed to the landlord.

"My advocacy has always been for protecting residents that live there now and allowing them to be able to remain there without the cost of rising values

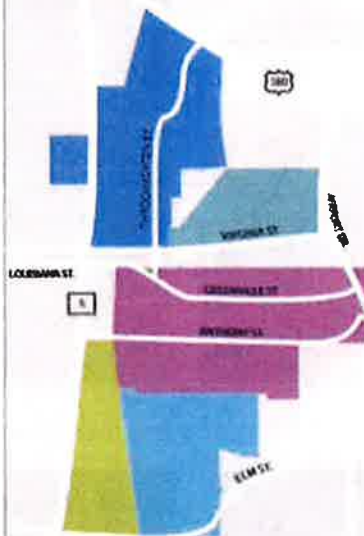
"THE NEIGHBORHOOD PRESERVATION STUDY CAME ABOUT IN AN EFFORT TO MAKE SURE THAT THE RESIDENTS THAT WANTED TO REMAIN IN THEIR HOMES WERE ABLE TO DO SO."

JANAY TIEKEM, DIRECTOR OF THE HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT

PRESERVING HISTORY

McKinney's Neighborhood Preservation Study addresses the impacts of new development on five east side neighborhoods, which are shown here.

Neighborhoods
 Lewisville La Loma-Lively Hill
 Mouszon Wilcox Rockwall



SOURCE: CITY OF MCKINNEY COMMUNITY IMPACT

to push them out," Mayor George Fuller said.

The City Council gave direction at a January work session indicating their support for expanding the existing tax increment reinvestment zone, pursuing a clear title program and creating an accessory dwelling unit loan program, according to city documents. A finalized neighborhood preservation plan is expected to be presented to the council.

For more information, visit www.mckinneytexas.org/7340/Studies#NPS. To give additional feedback or ask questions about the study, contact Janay Tiekem at 972-547-7578 or jtiekem@mckinneytexas.org.

MillHouse ArtFest
 McKinney Cotton Mill

50+ ARTISTS IN ATTENDANCE

Free Admission • Food & Beverages Available

February 25-26 | 11AM - 3PM | 410 Glen Street 75069

McKinney FODC

www.millhousefoundation.org/artfest

fit pelvis

Empowering You For Every Moment

Yoga • Health • Physical Therapy • Nutrition Counseling • Yoga • Health Coaching



MILLHOUSE FOUNDATION 2023 BUDGET

REVENUE

Donations	\$13,453
Programs	\$37,201
Grants	\$31,000
REVENUE TOTAL	\$81,654

EXPENSES

Rent/Utilities	\$17,226
Marketing	\$17,569
Other/Supplies	\$6,166
Artist Stipends	\$39,802
Salaries \$0	\$0
EXPENSES TOTAL	\$80,763

NET **\$891**

Our organization is new but growing. We do not have audited financial statements.

Form **990-EZ**

**Short Form
Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form, as it may be made public.

Go to www.irs.gov/Form990EZ for instructions and the latest information.

2022

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2022 calendar year, or tax year beginning _____, **and ending** _____

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

C Name of organization
MillHouse Foundation

D Employer identification number
83-3359144

E Telephone number
(202) 810-2101

F Group Exemption Number

G Accounting Method: Cash Accrual Other (specify) _____

H Check if the organization is not required to attach Schedule B (Form 990).

I Website: <https://millhousefoundation.org>

J Tax-exempt status (check only one) - 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527

K Form of organization: Corporation Trust Association Other _____

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ \$ **62,394.**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)
 Check if the organization used Schedule O to respond to any question in this Part I

		1	2	3	4	5a	5b	5c	6a	6b	6c	6d	7a	7b	7c	8	9	10	11	12	13	14	15	16	17	18	19	20	21		
Revenue	1	Contributions, gifts, grants, and similar amounts received		25,666.																											
	2	Program service revenue including government fees and contracts		36,728.																											
	3	Membership dues and assessments																													
	4	Investment income																													
	5a	Gross amount from sale of assets other than inventory	5a																												
	5b	Less: cost or other basis and sales expenses	5b																												
	5c	Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)																													
	6	Gaming and fundraising events:																													
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a																												
	b	Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b																												
c	Less: direct expenses from gaming and fundraising events	6c																													
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d																													
7a	Gross sales of inventory, less returns and allowances	7a																													
b	Less: cost of goods sold	7b																													
c	Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)	7c																													
8	Other revenue (describe in Schedule O)	8																													
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9		62,394.																											
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10																												
	11	Benefits paid to or for members	11																												
	12	Salaries, other compensation, and employee benefits	12		18,175.																										
	13	Professional fees and other payments to independent contractors	13		474.																										
	14	Occupancy, rent, utilities, and maintenance	14		23,115.																										
	15	Printing, publications, postage, and shipping	15																												
	16	Other expenses (describe in Schedule O)	16		15,683.																										
17	Total expenses. Add lines 10 through 16	17		57,447.																											
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 9)	18		4,947.																										
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19																												
	20	Other changes in net assets or fund balances (explain in Schedule O)	20																												
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21		4,947.																										

Part II Balance Sheets (see the instructions for Part II)

Check if the organization used Schedule O to respond to any question in this Part II

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	0.	0.
23 Land and buildings.	0.	0.
24 Other assets (describe in Schedule O)	0.	0.
25 Total assets	0.	0.
26 Total liabilities (describe in Schedule O)	0.	0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	0.	0.

Part III Statement of Program Service Accomplishments (see the instructions for Part III)

Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose? Support micro business women in creative fields.

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

	Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)
28 Talent Showcase <u>Community based festivals, markets and events to offer enhanced revenue opportunities for local and regional creatives by increasing</u> (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	28a
29 Spotlight <u>Highlight creative work through gallery exhibits, public art, media promotions, 13 public art murals on Cotton Mill, 450 media posts to</u> (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	29a
30 Collaboration <u>Elevate creative expression working with McKinney creatives and organizations; McKinney Garden Club Home Tours, Arts and Music</u> (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	30a
31 Other program services (describe in Schedule O) (Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	31a
32 Total program service expenses (add lines 28a through 31a)	32

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated - see the instructions for Part IV)

Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC/1099-NEC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
Dana J Brock Board Treasurer				
Aimee L Woolverton Board Secretary				
Elizabeth S Beck Board President				
Gail M Delger Board Director				
Lisa Temple Board Director				
Andrea Holmes Board Director				

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

		Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O		X
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O. See instructions		X
35a	Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?		X
b	If "Yes" to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O		
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III.		
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N		
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions	37a	
b	Did the organization file Form 1120-POL for this year?	37b	X
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee; or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a	X
b	If "Yes," complete Schedule L, Part II, and enter the total amount involved	38b	
39	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on line 9	39a	
b	Gross receipts, included on line 9, for public use of club facilities	39b	
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911: _____; section 4912: _____; section 4955: _____		
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I.	40b	X
c	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958		
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T.	40e	X
41	List the states with which a copy of this return is filed: TX		
42a	The organization's books are in care of: Dana J. Brock Telephone no. (202) 810-2101 Located at: 610 Elm Street Ste. 1000 Mckinney, TX ZIP + 4 75069-6777		
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country: _____ See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).	42b	X
c	At any time during the calendar year, did the organization maintain an office outside the United States? If "Yes," enter the name of the foreign country: _____	42c	X
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here. <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year	43	
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a	X
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44b	
c	Did the organization receive any payments for indoor tanning services during the year?	44c	X
d	If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	44d	
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a	X
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ. See instructions	45b	

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I. Yes No
46

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II. Yes No
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E. 47 48
49a Did the organization make any transfers to an exempt non-charitable related organization? 49a
b If "Yes," was the related organization a section 527 organization? 49b

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC/1099-NEC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

f Total number of other employees paid over \$100,000 **0**

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000 **0**

52 Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A. Yes No

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.

Sign Here	Signature of officer Elizabeth S. Beck, Board President		Date		
	Type or print name and title				
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name			Firm's EIN	
	Firm's address			Phone no.	

May the IRS discuss this return with the preparer shown above? See instructions Yes No

SCHEDULE A
(Form 990)

Public Charity Status and Public Support

OMB No. 1545-0047

2022

Open to Public Inspection

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization

Employer identification number

MillHouse Foundation

83-3359144

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 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 exempt 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).** (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
 - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
 (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3.						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f))	14	%
15 Public support percentage from 2021 Schedule A, Part II, line 14	15	%
16a 33 1/3 % support test—2022. If the organization did not check the box on line 13, and line 14 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 33 1/3 % support test—2021. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
17a 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization. <input type="checkbox"/>		
b 10%-facts-and-circumstances test—2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization. <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")			23,415.	5,257.	13,773.	42,445.
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose			28,329.			28,329.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5			51,744.	5,257.	13,773.	70,774.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						70,774.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6			51,744.	5,257.	13,773.	70,774.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)			51,744.	5,257.	13,773.	70,774.

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f)).	15	100.00%
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	100.00%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f)).	17	%
18 Investment income percentage from 2021 Schedule A, Part III, line 17.	18	%

19a 33 1/3 % support tests-2022. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization.

b 33 1/3 % support tests-2021. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization.

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or memberships of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.		Yes	No
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI.			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.			

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in **Part VI**).

See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	
Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	
Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2022 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1 Distributable amount for 2022 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2022 (reasonable cause required- explain in Part VI). See instr.			
3 Excess distributions carryover, if any, to 2022			
a From 2017			
b From 2018			
c From 2019			
d From 2020			
e From 2021			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2022 distributable amount			
i Carryover from 2017 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2022 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2022 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2023. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2018			
b Excess from 2019			
c Excess from 2020			
d Excess from 2021			
e Excess from 2022			

**SCHEDULE O
(Form 990)**

Supplemental Information to Form 990 or 990-EZ

OMB No. 1545-0047

**Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.**

2022

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

Name of the organization

Employer identification number

MillHouse Foundation

83-3359144

Name of the organization

Employer identification number

MillHouse Foundation

83-3359144

Part I Line 16

Advertising and promotion \$13541.00

Part I Line 16

Vendor Reimburse \$1920.00

Part I Line 16

Misc Exp \$222.00

Part I Line 13

Grant Watch \$199.00

Part I Line 13

Chamber of Commerce \$275.00

Details for Form 990, Part IX, Line 5

83-3359144

Date	Description	Amount
	Officers and Artists	18,175.00
	Total	18,175.00

Details for Form 990, Part IX, Line 16

83-3359144

Date	Description	Amount
	Occupancy	16,742.78
	Utilities	5,014.87
	Supplies	1,357.73
	Total	23,115.38

Details for Schedule A, Part III, Line 1

83-3359144

Date	Description	Amount
	City of McKinney	13,772.98
	Total	13,772.98

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

DEPARTMENT OF THE TREASURY

Date: **JUN 27 2019**

MILLHOUSE FOUNDATION
505 W LAMAR ST
MCKINNEY, TX 75069

Employer Identification Number:
83-3359144
DLN:
17053081321009
Contact Person:
ANNA M BLAIR ID# 17260
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
January 29, 2019
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

MILLHOUSE FOUNDATION

Sincerely *Stephen A. Martin*

Director, Exempt Organizations
Rulings and Agreements

Organization Docs

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
MillHouse Foundation

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Other (see instructions) ▶ **nonprofit corporation**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
610 Elm Street, Suite 1000

6 City, state, and ZIP code
McKinney, Texas 75069

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number

				-							
--	--	--	--	---	--	--	--	--	--	--	--

or

Employer identification number

8	3	-	3	3	5	9	1	4	4
---	---	---	---	---	---	---	---	---	---

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ **Beth Beck** Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

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 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee ¹ The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor ⁴

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

