

Application for Recognition of Exemption

Under Section 501(c)(3) of the Internal Revenue Code

For Paperwork Reduction Act Notice, see page 1 of the instructions.

To be filed in the key district for the area in which the organization has its principal office or place of business.

This application, when properly completed, constitutes the notice required under section 508(a) of the Internal Revenue Code so that an applicant may be treated as described in section 501(c)(3) of the Code, and the notice required under section 508(b) for an organization claiming not to be a private foundation within the meaning of section 509(a). (Read the instructions for each part carefully before making any entries.) If required information, a conformed copy of the organizing and operational documents, or financial data are not furnished, the application will not be considered on its merits and the organization will be notified accordingly. Do not file this application if the applicant has no organizing instrument (see Part III).

Part I.—Identification

1 Full name of organization Roger Tory Peterson Institute for the Study of Natural History		2 Employer identification number (If none, see instructions) Appl. mailed 7/11/84 to IRS Center, Andover, MA	
3(a) Address (number and street) 525 Falconer Street		Check here if applying under section: <input type="checkbox"/> 501(e) <input type="checkbox"/> 501(f)	
3(b) City or town, State, and Zip code Jamestown, NY 14701		4 Name and phone number of person to be contacted Paul A. Berke (716) 665-5220	
5 Month the annual accounting period ends August	6 Date incorporated or formed April 27, 1984	7 Activity codes 030 060 199	
8 Has the organization filed Federal income tax returns or exempt organization information returns? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," state the form number(s), years filed, and Internal Revenue office where filed.			

Part II.—Type of Entity and Organizational Document (see instructions)

Check the applicable entity box below and attach a conformed copy of the organization's organizing document and bylaws as indicated for each entity.

Corporation—Articles of incorporation and bylaws. Trust—Trust indenture. Other—Constitution or articles of association and bylaws. (Attachment 1)

Part III.—Activities and Operational Information

- 1 What are or will be the organization's sources of financial support? List in order of size.
- A. The major source of support will be voluntary charitable contributions. A copy of the proposed giving by the Gebbie Foundation is attached. Dr. Roger Tory Peterson will provide to the institute certain of his collections when the institute building is ready to receive them. (Attachments 2 and 3)
- B. No solicitations for financial support have been made other than the contributions from the Gebbie Foundation.
- C. When the exemption is recognized, the institution will undertake solicitations.
- 2 Describe the organization's fund-raising program, both actual and planned, and explain to what extent it has been put into effect. (Include details of fund-raising activities such as selective mailings, formation of fund-raising committees, use of professional fund raisers, etc.) Attach representative copies of solicitations for financial support.
- A. The Board of Trustees will serve initially as the fund raising committee. The first fund raising project will be solicitations of contributions from individuals and foundations known to have an interest in natural history, especially ornithology, and the mission of the institute.
- B. In the second phase, selective mailings with a personal follow-up will be made to individuals identified as having an interest in the purpose of the institute.

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and I have examined this application, including the accompanying statements, and to the best of my knowledge it is true, correct, and complete.

Paul A. Berke
(Signature)

President
(Title or authority of signer)

November 29, 1984
(Date)