** Return of Organization Exempt From Income Tax **

Form 990
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/Form990 for instructions and the latest information.

** ** OPEN TO PUBLIC INSPECTION ** **

** ** PUBLIC DISCLOSURE COPY ** **

JUL 1, 2022
JUN 30, 2023
MUSEUM OF THE NEW SOUTH, INC.
56-1748648
(704)333-1887
PO BOX 30125
CHARLOTTE, NC 28230

** PUBLIC DISCLOSURE COPY **

** **

Summary

Signature Block

Part II

990
Return of Organization Exempt From Income Tax

990
2022

[27x126]true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

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.

May the IRS discuss this return with the preparer shown above? See instructions

Here

Signature of officer

Date

RICHARD COOPER, PRESIDENT & CEO

Type or print name and title

AMY BIBBY

Preparer’s signature

Date

Check if self-employed

PTIN 00445891

Preparer’s name

Preparer’s address

Firm’s name

Firm’s EIN

Firm’s address

Phone no.

For Paperwork Reduction Act Notice, see the separate instructions.

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

### Part I

<table>
<thead>
<tr>
<th>Description</th>
<th>Prior Year</th>
<th>Current Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and grants</td>
<td>1,064,465</td>
<td>1,586,944</td>
</tr>
<tr>
<td>Program service revenue</td>
<td>107,027</td>
<td>16,320</td>
</tr>
<tr>
<td>Investment income</td>
<td>5,422,036</td>
<td>45,401</td>
</tr>
<tr>
<td>Other revenue</td>
<td>93,838</td>
<td>72,245</td>
</tr>
<tr>
<td>Total revenue</td>
<td>6,687,366</td>
<td>1,720,910</td>
</tr>
<tr>
<td>Grants and similar amounts paid</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Benefits paid to or for members</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Salaries, other compensation, employee benefits</td>
<td>1,168,674</td>
<td>1,612,052</td>
</tr>
<tr>
<td>Professional fundraising fees</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total fundraising expenses</td>
<td>324,197</td>
<td></td>
</tr>
<tr>
<td>Other expenses</td>
<td>894,011</td>
<td>1,435,044</td>
</tr>
<tr>
<td>Total expenses</td>
<td>2,062,685</td>
<td>3,047,096</td>
</tr>
<tr>
<td>Revenue less expenses. Subtract line 18 from line 12</td>
<td>4,624,681</td>
<td>-1,326,186</td>
</tr>
</tbody>
</table>

### Part II

<table>
<thead>
<tr>
<th>Description</th>
<th>Beginning of Current Year</th>
<th>End of Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total assets</td>
<td>19,470,866</td>
<td>18,718,004</td>
</tr>
<tr>
<td>Total liabilities</td>
<td>130,693</td>
<td>118,317</td>
</tr>
<tr>
<td>Net assets or fund balances. Subtract line 21 from line 20</td>
<td>19,340,173</td>
<td>18,599,687</td>
</tr>
</tbody>
</table>

For Paperwork Reduction Act Notice, see the separate instructions.
MUSEUM OF THE NEW SOUTH, INC. 56-1748648

Part III Statement of Program Service Accomplishments

1 Briefly describe the organization’s mission:

LEVINE MUSEUM'S MISSION IS TO CONNECT THE PAST TO THE FUTURE TO REALIZE THE PROMISES OF A NEW SOUTH THROUGH EXHIBITS THAT EXPLORE COMPLEX CHAPTERS IN THE REGION'S HISTORY AND PROGRAMS THAT LAUNCH DIALOGUE, FOSTER EMPATHY, AND BUILD AN EQUITABLE COMMUNITY.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? □ Yes □ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? □ Yes □ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ______) (Expenses $1,939,451. including grants of $ ) (Revenue $15,059.)

PLEASE SEE OUR STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS ON SCHEDULE O.

4b (Code: ______) (Expenses $ including grants of $ ) (Revenue $ )

4c (Code: ______) (Expenses $ including grants of $ ) (Revenue $ )

4d Other program services (Describe on Schedule O.)

(Expenses $ including grants of $ ) (Revenue $ )

4e Total program service expenses $1,939,451.
**Part IV Checklist of Required Schedules**

1. Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?
   - If "Yes," complete Schedule A
   - Yes [X] No [ ]

2. Is the organization required to complete Schedule B, Schedule of Contributors? See instructions
   - Yes [X] No [ ]

3. Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I
   - Yes [X] No [ ]

4. Section 501(c)(3) organizations. 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 [X] No [ ]

5. Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III
   - Yes [X] No [ ]

6. Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I
   - Yes [X] No [ ]

7. Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II
   - Yes [X] No [ ]

8. Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III
   - Yes [X] No [ ]

9. Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV
   - Yes [X] No [ ]

10. Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? If "Yes," complete Schedule D, Part V
    - Yes [X] No [ ]

11. If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.
    - If "Yes," complete Schedule D, Part VI

12a. Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI
    - Yes [X] No [ ]

12b. Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII
    - Yes [X] No [ ]

12c. Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII
    - Yes [X] No [ ]

12d. Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX
    - Yes [X] No [ ]

12e. Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X
    - Yes [X] No [ ]

12f. Did the organization’s separate or consolidated financial statements for the tax year include a footnote that addresses the organization’s liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X
    - Yes [X] No [ ]

12g. Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII
    - Yes [X] No [ ]

12h. Was the organization included in consolidated, independent audited financial statements for the tax year?
    - Yes [X] No [ ]

13. Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E
    - Yes [X] No [ ]

14a. Did the organization maintain an office, employees, or agents outside of the United States?
    - Yes [X] No [ ]

14b. Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? If "Yes," complete Schedule F, Parts I and IV
    - Yes [X] No [ ]

15. Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV
    - Yes [X] No [ ]

16. Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV
    - Yes [X] No [ ]

17. Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions
    - Yes [X] No [ ]

18. Did the organization report more than $15,000 of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II
    - Yes [X] No [ ]

19. Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III
    - Yes [X] No [ ]

20a. Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H
    - Yes [X] No [ ]

20b. If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?
    - Yes [X] No [ ]

21. Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 17? If "Yes," complete Schedule I, Parts I and II
    - Yes [X] No [ ]
### Part IV Checklist of Required Schedules (continued)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>22</td>
<td>X</td>
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<tr>
<td>23</td>
<td>X</td>
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<tr>
<td>24a</td>
<td>X</td>
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<td>24b</td>
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<td>24c</td>
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<td>25a</td>
<td>X</td>
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<td>25b</td>
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<td>26</td>
<td>X</td>
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<td>27</td>
<td>X</td>
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<tr>
<td>28a</td>
<td>X</td>
</tr>
<tr>
<td>28b</td>
<td></td>
</tr>
<tr>
<td>28c</td>
<td></td>
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<tr>
<td>29</td>
<td>X</td>
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<tr>
<td>30</td>
<td>X</td>
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<td>31</td>
<td>X</td>
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<td>32</td>
<td>X</td>
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<td>33</td>
<td>X</td>
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<tr>
<td>34</td>
<td></td>
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<tr>
<td>34a</td>
<td>X</td>
</tr>
<tr>
<td>35a</td>
<td></td>
</tr>
<tr>
<td>35b</td>
<td></td>
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<tr>
<td>36</td>
<td>X</td>
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<tr>
<td>37</td>
<td>X</td>
</tr>
<tr>
<td>38</td>
<td>X</td>
</tr>
</tbody>
</table>

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

- **1a** Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable  
  **39**  
- **1b** Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable  
  **0**  
- **1c** Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?  
  **X**
Part V

Statements Regarding Other IRS Filings and Tax Compliance

2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return .............................................. 2a 24

b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? .............................................. 2b X

3a Did the organization have unrelated business gross income of $1,000 or more during the year? .............................................. 3a X

b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O ........................................... 3b X

4a 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)? .............................................. 4a X

b If "Yes," enter the name of the foreign country


5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? .............................................. 5a X

b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? .............................................. 5b X

c If "Yes" to line 5a or 5b, did the organization file Form 8886-T? .............................................. 5c

6a Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? .............................................. 6a X

b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? .............................................. 6b

7 Organizations that may receive deductible contributions under section 170(c).

a Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor? .............................................. 7a X

b If "Yes," did the organization notify the donor of the value of the goods or services provided? .............................................. 7b X

c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? .............................................. 7c X

d If "Yes," indicate the number of Forms 8282 filed during the year .............................................. 7d

e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? .............................................. 7e X

f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? .............................................. 7f X

g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? .............................................. 7g

h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? .............................................. 7h

8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? .............................................. 8

9 Sponsoring organizations maintaining donor advised funds.

a Did the sponsoring organization make any taxable distributions under section 4966? .............................................. 9a

b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? .............................................. 9b

10 Section 501(c)(7) organizations. Enter:

a Initiation fees and capital contributions included on Part VIII, line 12 .............................................. 10a

b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities .............................................. 10b

11 Section 501(c)(12) organizations. Enter:

a Gross income from members or shareholders .............................................. 11a

b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) .............................................. 11b

12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? .............................................. 12a

b If "Yes," enter the amount of tax-exempt interest received or accrued during the year .............................................. 12b

13 Section 501(c)(29) qualified nonprofit health insurance issuers.

a Is the organization licensed to issue qualified health plans in more than one state?

Note: See the instructions for additional information the organization must report on Schedule O.

b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans .............................................. 13b

c Enter the amount of reserves on hand .............................................. 13c

14a Did the organization receive any payments for indoor tanning services during the tax year? .............................................. 14a X

b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O .............................................. 14b

15 Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? .............................................. 15 X

b If "Yes," see the instructions and file Form 4720, Schedule N.

16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? .............................................. 16 X

b If "Yes," complete Form 4720, Schedule O.

17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? .............................................. 17

b If "Yes," complete Form 6069.
### Part VI | Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

#### Section A. Governing Body and Management

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Enter the number of voting members of the governing body at the end of the tax year</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>1b</td>
<td>Enter the number of voting members included on line 1a, above, who are independent</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Did the organization become aware during the year of a significant diversion of the organization’s assets?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Did the organization have members or stockholders?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>7a</td>
<td>Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>The governing body?</td>
<td>8a</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Each committee with authority to act on behalf of the governing body?</td>
<td>8b</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization’s mailing address? If &quot;Yes,&quot; provide the names and addresses on Schedule O</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

#### Section B. Policies

(This Section B requests information about policies not required by the Internal Revenue Code.)

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>10a</td>
<td>Did the organization have local chapters, branches, or affiliates?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>10b</td>
<td>If &quot;Yes,&quot; did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization’s exempt purposes?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11a</td>
<td>Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>11b</td>
<td>Describe on Schedule O the process, if any, used by the organization to review this Form 990.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12a</td>
<td>Did the organization have a written conflict of interest policy? If &quot;No,&quot; go to line 13</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>12b</td>
<td>Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>12c</td>
<td>Did the organization regularly and consistently monitor and enforce compliance with the policy? If &quot;Yes,&quot; describe on Schedule O how this was done</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Did the organization have a written whistleblower policy?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Did the organization have a written document retention and destruction policy?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>The organization’s CEO, Executive Director, or top management official</td>
<td>15a</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Other officers or key employees of the organization</td>
<td>15b</td>
<td></td>
</tr>
<tr>
<td>16a</td>
<td>Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>16b</td>
<td>If &quot;Yes,&quot; did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization’s exempt status with respect to such arrangements?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Section C. Disclosure

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>X</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>List the states with which a copy of this Form 990 is required to be filed</td>
<td>NONE</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>State the name, address, and telephone number of the person who possesses the organization’s books and records</td>
<td>LISA HORLDT - 704-333-1887</td>
<td></td>
</tr>
<tr>
<td></td>
<td>200 EAST 7TH STREET, CHARLOTTE, NC 28202</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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LISA HORLDT - 704-333-1887
200 EAST 7TH STREET, CHARLOTTE, NC 28202
Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization’s tax year.

- List all of the organization’s current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization’s current key employees, if any. See the instructions for definition of “key employee.”
- List the organization’s five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than $100,000 from the organization and any related organizations.
- List all of the organization’s former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week</th>
<th>(C) Position</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) KATHRYN HILL</td>
<td>40.00</td>
<td>X</td>
<td>201,817.</td>
<td>0.</td>
<td>8,099.</td>
</tr>
<tr>
<td>PRESIDENT &amp; CEO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) LISA HORLDT</td>
<td>40.00</td>
<td>X</td>
<td>107,149.</td>
<td>0.</td>
<td>10,238.</td>
</tr>
<tr>
<td>CHIEF FINANCIAL OFFICER</td>
<td>40.00</td>
<td>X</td>
<td>107,666.</td>
<td>0.</td>
<td>9,460.</td>
</tr>
<tr>
<td>(3) FRANCES ABBOTT</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHIEF CONTENT STRATEGIST</td>
<td>40.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4) JOHN RUSSICK</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INTERIM PRESIDENT &amp; CEO</td>
<td>40.00</td>
<td>X</td>
<td>29,292.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(5) KIETH COCKRELL</td>
<td>2.00</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IMMEDIATE PAST CHAIR</td>
<td></td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6) TY NIESS</td>
<td>2.00</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHAIR</td>
<td></td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7) JIMMY KMETZ</td>
<td>2.00</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TREASURER</td>
<td></td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8) VIDA HARVEY</td>
<td>2.00</td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9) KELLY ALEXANDER</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(10) JUDY AUGUST</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(11) KEITH CLARK</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(12) DENISE COLEMAN</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(13) LUCIA ZAPATA GRIFFITH</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(14) RHONDAL HAYWOOD</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(15) KEVIN MALCOLM</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SECRETARY</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(16) KATR MAYNARD</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(17) CG NEWSOME</td>
<td>2.00</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

<table>
<thead>
<tr>
<th>Name and title</th>
<th>Average hours per week</th>
<th>Position</th>
<th>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)</th>
<th>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)</th>
<th>Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(18) SCOTT POOLE</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(19) HUNTER PRIESTER</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(20) RYAN RICH</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(21) MICHAEL SMITH</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(22) CLAYE STOKES</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(23) CYNTHIA WALLACE</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(24) GLEN WRIGHT</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(25) JONI ADAMS</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(26) GRIS BAILEY</td>
<td>2.00</td>
<td>DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
</tbody>
</table>

#### Part VII, Section A Continuation Sheets

Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization: 0

---

### Section B. Independent Contractors

1. Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization’s tax year.

<table>
<thead>
<tr>
<th>Name and business address</th>
<th>Description of services</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization: 0
<table>
<thead>
<tr>
<th>Name and title</th>
<th>Average hours per week (list any hours for related organizations below line)</th>
<th>Position (check all that apply)</th>
<th>Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(27) DAVID JACOBS DIRECTOR</td>
<td>2.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(28) BRYON WHITE DIRECTOR</td>
<td>2.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
</tbody>
</table>

Total to Part VII, Section A, line 1c
## Part VIII  Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

<table>
<thead>
<tr>
<th>Contributions, Gifts, Grants and Other Similar Amounts</th>
<th>(A) Total revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512 - 514</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 a Federated campaigns</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 b Membership dues</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 c Fundraising events</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 d Related organizations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 e Government grants (contributions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 f All other contributions, gifts, grants, and</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>similar amounts not included above</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 g Noncash contributions included in lines 1a-1f</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h Total. Add lines 1a-1f</td>
<td></td>
<td></td>
<td></td>
<td>1,586,944.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Service Revenue</th>
<th>Business Code</th>
<th>(A) Total revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 a ADOPTIONS AND SALES</td>
<td>713990</td>
<td>16,320.</td>
<td>16,320.</td>
<td></td>
</tr>
<tr>
<td>2 b</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 c</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 d</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 e</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f All other program service revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g Total. Add lines 2a-2f</td>
<td></td>
<td>16,320.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>(A) Total revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Investment income (including dividends, interest, and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>other similar amounts)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Income from investment of tax-exempt bond proceeds</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Royalties</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 a Gross rents</td>
<td>(i) Real</td>
<td>(ii) Personal</td>
<td></td>
</tr>
<tr>
<td>6 b Less: rental expenses</td>
<td>(i) Securities</td>
<td>(ii) Other</td>
<td></td>
</tr>
<tr>
<td>6 c Rental income or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 d Net rental income or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 a Gross amount from sales of assets other than inventory</td>
<td>(i) Securities</td>
<td>(ii) Other</td>
<td></td>
</tr>
<tr>
<td>7 b Less: cost or other basis and sales expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 c Gain or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 d Net gain or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 a Gross income from fundraising events (not including</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$ contributions reported on line 1c). See Part IV, line 8</td>
<td></td>
<td>153,252.</td>
<td>86,522.</td>
</tr>
<tr>
<td>8 b Less: direct expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 c Net income or (loss) from fundraising events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 a Gross income from gaming activities. See Part IV,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>line 19</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 b Less: direct expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 c Net income or (loss) from gaming activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 a Gross sales of inventory, less returns and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>allowances</td>
<td></td>
<td>10,628.</td>
<td>7,934.</td>
</tr>
<tr>
<td>10 b Less: cost of goods sold</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 c Net income or (loss) from sales of inventory</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 a MISCELLANEOUS REVENUE</td>
<td>Business Code</td>
<td>2,821.</td>
<td></td>
</tr>
<tr>
<td>11 b</td>
<td></td>
<td>2,821.</td>
<td></td>
</tr>
<tr>
<td>11 c</td>
<td></td>
<td>2,821.</td>
<td></td>
</tr>
<tr>
<td>11 d All other revenue</td>
<td></td>
<td>2,821.</td>
<td></td>
</tr>
<tr>
<td>e Total. Add lines 11a-11d</td>
<td></td>
<td>2,821.</td>
<td></td>
</tr>
<tr>
<td>12 Total revenue. See instructions</td>
<td></td>
<td>1,720,910.</td>
<td>15,059.</td>
</tr>
</tbody>
</table>
### Part IX - Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

**Check if Schedule O contains a response or note to any line in this Part IX** [X]

<table>
<thead>
<tr>
<th></th>
<th>(A) Total expenses</th>
<th>(B) Program service expenses</th>
<th>(C) Management and general expenses</th>
<th>(D) Fundraising expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21</td>
<td>328,086</td>
<td>112,761</td>
<td>215,325</td>
</tr>
<tr>
<td>2</td>
<td>Grants and other assistance to domestic individuals. See Part IV, line 22</td>
<td>74,462</td>
<td>74,462</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16</td>
<td>466,437</td>
<td>345,023</td>
<td>119,763</td>
</tr>
<tr>
<td>4</td>
<td>Benefits paid to or for members</td>
<td>43,495</td>
<td>29,321</td>
<td>14,033</td>
</tr>
<tr>
<td>5</td>
<td>Compensation of current officers, directors, trustees, and key employees</td>
<td>53,810</td>
<td>53,810</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Other salaries and wages</td>
<td>1,202,551</td>
<td>768,522</td>
<td>200,129</td>
</tr>
<tr>
<td>8</td>
<td>Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)</td>
<td>22,188</td>
<td>13,668</td>
<td>4,552</td>
</tr>
<tr>
<td>9</td>
<td>Other employee benefits</td>
<td>57,184</td>
<td>35,225</td>
<td>11,733</td>
</tr>
<tr>
<td>10</td>
<td>Payroll taxes</td>
<td>90,922</td>
<td>56,008</td>
<td>18,655</td>
</tr>
<tr>
<td>11</td>
<td>Fees for services (nonemployees):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Management</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Legal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Accounting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Lobbying</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Professional fundraising services. See Part IV, line 17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f</td>
<td>Investment management fees</td>
<td>18,587</td>
<td>18,587</td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)</td>
<td>35,225</td>
<td>11,733</td>
<td>10,226</td>
</tr>
<tr>
<td>12</td>
<td>Advertising and promotion</td>
<td>2,954</td>
<td>1,130</td>
<td>696</td>
</tr>
<tr>
<td>13</td>
<td>Office expenses</td>
<td>26,14</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>14</td>
<td>Information technology</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>15</td>
<td>Royalties</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>16</td>
<td>Occupancy</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>17</td>
<td>Travel</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>18</td>
<td>Payments of travel or entertainment expenses for any federal, state, or local public officials</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>19</td>
<td>Conferences, conventions, and meetings</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>20</td>
<td>Interest</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>21</td>
<td>Payments to affiliates</td>
<td>2,614</td>
<td>1,000</td>
<td>616</td>
</tr>
<tr>
<td>22</td>
<td>Depreciation, depletion, and amortization</td>
<td>23,284</td>
<td>23,284</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Insurance</td>
<td>23,284</td>
<td>23,284</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>EXHIBITS AND PROGRAMS</td>
<td>245,318</td>
<td>245,318</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>MISCELLANEOUS</td>
<td>145,873</td>
<td>93,997</td>
<td>38,557</td>
</tr>
<tr>
<td>c</td>
<td>BAD DEBT EXPENSE</td>
<td>2,017</td>
<td>2,017</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>UNRELATED BUSINESS INCO</td>
<td>22</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>e</td>
<td>All other expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Total functional expenses. Add lines 1 through 24e</td>
<td>3,047,096</td>
<td>1,939,451</td>
<td>783,448</td>
</tr>
<tr>
<td>26</td>
<td>Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Part X Balance Sheet

**Assets**

<table>
<thead>
<tr>
<th>Item</th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash - non-interest-bearing</td>
<td>741,255.</td>
<td>671,260.</td>
</tr>
<tr>
<td>Savings and temporary cash investments</td>
<td>10,155,769.</td>
<td>9,370,892.</td>
</tr>
<tr>
<td>Pledges and grants receivable, net</td>
<td>206,900.</td>
<td>5,000.</td>
</tr>
<tr>
<td>Accounts receivable, net</td>
<td>28,567.</td>
<td>55,967.</td>
</tr>
<tr>
<td>Loans and other receivables from any current or former officer,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>director, trustee, key employee, creator or founder, substantial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>contributor, or 35% controlled entity or family member of any of</td>
<td></td>
<td></td>
</tr>
<tr>
<td>these persons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loans and other receivables from other disqualified persons (as</td>
<td></td>
<td></td>
</tr>
<tr>
<td>defined under section 4958(f)(1)), and persons described in section</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4958(c)(3)(B)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes and loans receivable, net</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventories for sale or use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepaid expenses and deferred charges</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land, buildings, and equipment: cost or other basis. Complete Part</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VI of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less: accumulated depreciation</td>
<td>251,081.</td>
<td>123,598.</td>
</tr>
<tr>
<td>Investments - publicly traded securities</td>
<td>8,287,899.</td>
<td>8,464,698.</td>
</tr>
<tr>
<td>Investments - other securities. See Part IV, line 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments - program-related. See Part IV, line 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intangible assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other assets. See Part IV, line 11</td>
<td>7,353.</td>
<td>13,442.</td>
</tr>
<tr>
<td>Total assets. Add lines 1 through 15 (must equal line 33)</td>
<td>19,470,866.</td>
<td>18,718,004.</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>130,693.</td>
<td>113,746.</td>
</tr>
<tr>
<td>Grants payable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deferred revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax-exempt bond liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Escrow or custodial account liability. Complete Part IV of Schedule</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loans and other payables to any current or former officer, director,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>trustee, key employee, creator or founder, substantial contributor,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or 35% controlled entity or family member of any of these persons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other liabilities (including federal income tax, payables to related</td>
<td></td>
<td></td>
</tr>
<tr>
<td>third parties, and other liabilities not included on lines 17-24).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete Part X of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>130,693.</td>
<td>113,746.</td>
</tr>
<tr>
<td>Loans and other payables to any current or former officer, director,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>trustee, key employee, creator or founder, substantial contributor,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or 35% controlled entity or family member of any of these persons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total liabilities. Add lines 17 through 25</td>
<td>130,693.</td>
<td>118,317.</td>
</tr>
</tbody>
</table>

**Liabilities**

| Organizations that follow FASB ASC 958, check here and complete lines | (A) Beginning of year | (B) End of year |
| 27 Net assets without donor restrictions                             | 18,934,857.           | 18,368,110.     |
| 28 Net assets with donor restrictions                                | 405,316.              | 231,577.        |
| Organizations that do not follow FASB ASC 958, check here and complete lines |                     |                 |
| 29 Capital stock or trust principal, or current funds               |                       |                 |
| 30 Paid-in or capital surplus, or land, building, or equipment fund |                       |                 |
| 31 Retained earnings, endowment, accumulated income, or other funds |                       |                 |
| 32 Total net assets or fund balances                                | 19,340,173.           | 18,599,687.     |
| 33 Total liabilities and net assets/fund balances                   | 19,470,866.           | 18,718,004.     |
**Part XI | Reconciliation of Net Assets**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VIII, column (A), line 12)</td>
<td>1,720,910.</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part IX, column (A), line 25)</td>
<td>3,047,096.</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses. Subtract line 2 from line 1</td>
<td>-1,326,186.</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))</td>
<td>19,340,173.</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
<td>585,700.</td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain on Schedule O)</td>
<td>0.</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, column (B))</td>
<td>18,599,687.</td>
</tr>
</tbody>
</table>

**Part XII | Financial Statements and Reporting**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Accounting method used to prepare the Form 990:</td>
<td>X Accrual</td>
</tr>
<tr>
<td></td>
<td>If the organization changed its method of accounting from a prior year or checked &quot;Other,&quot; explain on Schedule O.</td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Were the organization’s financial statements compiled or reviewed by an independent accountant?</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>If “Yes,” check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Separate basis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidated basis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Both consolidated and separate basis</td>
<td></td>
</tr>
<tr>
<td>2b</td>
<td>Were the organization’s financial statements audited by an independent accountant?</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>If “Yes,” check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Separate basis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidated basis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Both consolidated and separate basis</td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>If “Yes” to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.</td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?</td>
<td>X</td>
</tr>
<tr>
<td>3b</td>
<td>If “Yes,” did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits</td>
<td></td>
</tr>
</tbody>
</table>
MUSEUM OF THE NEW SOUTH, INC.

**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.)


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 supported 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)

Total

*LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.* 232021 12-09-22 Schedule A (Form 990) 2022
### 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

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2018</th>
<th>(b) 2019</th>
<th>(c) 2020</th>
<th>(d) 2021</th>
<th>(e) 2022</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gifts, grants, contributions, and membership fees received. (Do not include any &quot;unusual grants.&quot;)</td>
<td>1360091.</td>
<td>1406514.</td>
<td>1833986.</td>
<td>1064465.</td>
<td>1586944.</td>
<td>7252000.</td>
</tr>
<tr>
<td>2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td>227,244.</td>
<td>133,714.</td>
<td>13,231.</td>
<td>9,557.</td>
<td>45,401.</td>
<td>429,147.</td>
</tr>
<tr>
<td>3 The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td>13,501.</td>
<td>7,734.</td>
<td>2,640.</td>
<td>3,955.</td>
<td>27,830.</td>
<td>2,821.</td>
</tr>
<tr>
<td>4 Total. Add lines 1 through 3</td>
<td>1833986.</td>
<td>1064465.</td>
<td>1586944.</td>
<td>7252000.</td>
<td>1833986.</td>
<td>1064465.</td>
</tr>
<tr>
<td>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)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1168500.</td>
</tr>
<tr>
<td>6 Public support, Subtract line 5 from line 4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6083500.</td>
</tr>
</tbody>
</table>

#### Section B. Total Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2018</th>
<th>(b) 2019</th>
<th>(c) 2020</th>
<th>(d) 2021</th>
<th>(e) 2022</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Amounts from line 4</td>
<td>1360091.</td>
<td>1406514.</td>
<td>1833986.</td>
<td>1064465.</td>
<td>1586944.</td>
<td>7252000.</td>
</tr>
<tr>
<td>8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources</td>
<td>227,244.</td>
<td>133,714.</td>
<td>13,231.</td>
<td>9,557.</td>
<td>45,401.</td>
<td>429,147.</td>
</tr>
<tr>
<td>9 Net income from unrelated business activities, whether or not the business is regularly carried on</td>
<td>13,501.</td>
<td>7,734.</td>
<td>2,640.</td>
<td>3,955.</td>
<td>27,830.</td>
<td>2,821.</td>
</tr>
<tr>
<td>10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2,821.</td>
<td>2,821.</td>
</tr>
<tr>
<td>11 Total support. Add lines 7 through 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7711798.</td>
</tr>
<tr>
<td>12 Gross receipts from related activities, etc. (see instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>571,291.</td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th>(a) 2018</th>
<th>(b) 2019</th>
<th>(c) 2020</th>
<th>(d) 2021</th>
<th>(e) 2022</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f))</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Public support percentage from 2021 Schedule A, Part II, line 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Section A. Public Support

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>(a) 2018</th>
<th>(b) 2019</th>
<th>(c) 2020</th>
<th>(d) 2021</th>
<th>(e) 2022</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Gifts, grants, contributions, and membership fees received. (Do not include any &quot;unusual grants.&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Gross receipts from activities that are not an unrelated trade or business under section 513</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Tax revenues levied for the organization’s benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Total. Add lines 1 through 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7a</td>
<td>Amounts included on lines 1, 2, and 3 received from disqualified persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7b</td>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Public support. Subtract line 7c from line 8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section B. Total Support

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>(a) 2018</th>
<th>(b) 2019</th>
<th>(c) 2020</th>
<th>(d) 2021</th>
<th>(e) 2022</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Amounts from line 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10a</td>
<td>Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b</td>
<td>Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Total support. Add lines 9, 10a, 11, and 12.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f))</td>
<td>15%</td>
</tr>
<tr>
<td>16</td>
<td>Public support percentage from 2021 Schedule A, Part III, line 15</td>
<td>16%</td>
</tr>
</tbody>
</table>

### Section D. Computation of Investment Income Percentage

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f))</td>
<td>17%</td>
</tr>
<tr>
<td>18</td>
<td>Investment income percentage from 2021 Schedule A, Part III, line 17</td>
<td>18%</td>
</tr>
</tbody>
</table>

### Notes
- **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.
- **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

**Section A. All Supporting Organizations**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Are all of the organization’s supported organizations listed by name in the organization’s governing documents? 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.</td>
<td>Yes</td>
</tr>
<tr>
<td>2. Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If “Yes,” explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</td>
<td>Yes</td>
</tr>
<tr>
<td>3a. Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If “Yes,” answer lines 3b and 3c below.</td>
<td>Yes</td>
</tr>
<tr>
<td>3b. 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)? If “Yes,” describe in Part VI when and how the organization made the determination.</td>
<td>Yes</td>
</tr>
<tr>
<td>3c. Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If “Yes,” explain in Part VI what controls the organization put in place to ensure such use.</td>
<td>Yes</td>
</tr>
<tr>
<td>4a. Was any supported organization not organized in the United States (“foreign supported organization?” If “Yes,” and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</td>
<td>Yes</td>
</tr>
<tr>
<td>4b. Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? 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.</td>
<td>Yes</td>
</tr>
<tr>
<td>4c. 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)? 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.</td>
<td>Yes</td>
</tr>
<tr>
<td>5a. Did the organization add, substitute, or remove any supported organizations during the tax year? 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).</td>
<td>Yes</td>
</tr>
<tr>
<td>5b. <strong>Type I or Type II only.</strong> Was any added or substituted supported organization part of a class already designated in the organization’s organizing document?</td>
<td>Yes</td>
</tr>
<tr>
<td>5c. <strong>Substitutions only.</strong> Was the substitution the result of an event beyond the organization’s control?</td>
<td>Yes</td>
</tr>
<tr>
<td>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? If “Yes,” provide detail in Part VI.</td>
<td>Yes</td>
</tr>
<tr>
<td>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? If “Yes,” complete Part I of Schedule L (Form 990).</td>
<td>Yes</td>
</tr>
<tr>
<td>8. Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If “Yes,” complete Part I of Schedule L (Form 990).</td>
<td>Yes</td>
</tr>
<tr>
<td>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))? If “Yes,” provide detail in Part VI.</td>
<td>Yes</td>
</tr>
<tr>
<td>9b. 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? If “Yes,” provide detail in Part VI.</td>
<td>Yes</td>
</tr>
<tr>
<td>9c. 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? If “Yes,” provide detail in Part VI.</td>
<td>Yes</td>
</tr>
<tr>
<td>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)? If “Yes,” answer line 10b below.</td>
<td>Yes</td>
</tr>
<tr>
<td>10b. Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Part IV Supporting Organizations (continued)

11 Has the organization accepted a gift or contribution from any of the following persons?
   - 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

1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership 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

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

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 The organization satisfied the Activities Test. Complete line 2 below.
   - b The organization is the parent of each of its supported organizations. Complete line 3 below.
   - c 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.
   - 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 VI

#### Section A - Adjusted Net Income

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Net short-term capital gain</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Recoveries of prior-year distributions</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Other gross income (see instructions)</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Add lines 1 through 3.</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Depreciation and depletion</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>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)</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Other expenses (see instructions)</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)</td>
<td>8</td>
</tr>
</tbody>
</table>

#### Section B - Minimum Asset Amount

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Average monthly value of securities</td>
<td>1a</td>
</tr>
<tr>
<td>b</td>
<td>Average monthly cash balances</td>
<td>1b</td>
</tr>
<tr>
<td>c</td>
<td>Fair market value of other non-exempt-use assets</td>
<td>1c</td>
</tr>
<tr>
<td>d</td>
<td>Total (add lines 1a, 1b, and 1c)</td>
<td>1d</td>
</tr>
<tr>
<td>e</td>
<td>Discount claimed for blockage or other factors (explain in detail in Part VI):</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Acquisition indebtedness applicable to non-exempt-use assets</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2 from line 1d.</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Net value of non-exempt-use assets (subtract line 4 from line 3)</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>Multiply line 5 by 0.035.</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Recoveries of prior-year distributions</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Minimum Asset Amount (add line 7 to line 6)</td>
<td>8</td>
</tr>
</tbody>
</table>

#### Section C - Distributable Amount

<table>
<thead>
<tr>
<th></th>
<th>Current Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Adjusted net income for prior year (from Section A, line 8, column A)</td>
</tr>
<tr>
<td>2</td>
<td>Enter 0.85 of line 1.</td>
</tr>
<tr>
<td>3</td>
<td>Minimum asset amount for prior year (from Section B, line 8, column A)</td>
</tr>
<tr>
<td>4</td>
<td>Enter greater of line 2 or line 3.</td>
</tr>
<tr>
<td>5</td>
<td>Income tax imposed in prior year</td>
</tr>
<tr>
<td>6</td>
<td>Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).</td>
</tr>
<tr>
<td>7</td>
<td>Check here if the current year is the organization’s first as a non-functionally integrated Type III supporting organization (see instructions).</td>
</tr>
</tbody>
</table>
### Part V - Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

**Section D - Distributions**

<table>
<thead>
<tr>
<th></th>
<th>Current Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amounts paid to supported organizations to accomplish exempt purposes</td>
</tr>
<tr>
<td>2</td>
<td>Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity</td>
</tr>
<tr>
<td>3</td>
<td>Administrative expenses paid to accomplish exempt purposes of supported organizations</td>
</tr>
<tr>
<td>4</td>
<td>Amounts paid to acquire exempt-use assets</td>
</tr>
<tr>
<td>5</td>
<td>Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)</td>
</tr>
<tr>
<td>6</td>
<td>Other distributions (describe in Part VI). See instructions.</td>
</tr>
<tr>
<td>7</td>
<td><strong>Total annual distributions.</strong> Add lines 1 through 6.</td>
</tr>
</tbody>
</table>

**Part VI**

- **Excess Distributions**
- **Underdistributions**
- **Distributable Amount for 2022**

**Section E - Distribution Allocations** (see instructions)

<table>
<thead>
<tr>
<th></th>
<th>Excess Distributions</th>
<th>Underdistributions Pre-2022</th>
<th>Distributable Amount for 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Distributable amount for 2022 from Section C, line 6</td>
<td>(i)</td>
<td>(ii)</td>
</tr>
<tr>
<td>2</td>
<td>Underdistributions, if any, for years prior to 2022 (reasonable cause required - explain in Part VI). See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Excess distributions carryover, if any, to 2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>From 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>From 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>From 2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>From 2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>From 2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f</td>
<td><strong>Total</strong> of lines 3a through 3e</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h</td>
<td>Applied to 2022 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i</td>
<td>Carryover from 2017 not applied (see instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j</td>
<td>Remainder. Subtract lines 3g, 3h, and 3i from line 3f</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Distributions for 2022 from Section D, line 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Applied to 2022 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Remainder. Subtract lines 4a and 4b from line 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>Excess distributions carryover to 2023.</strong> Add lines 3j and 4c.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Excess from 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Excess from 2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Excess from 2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Excess from 2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Excess from 2022</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12;
Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C,
line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V,
Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)
** PUBLIC DISCLOSURE COPY **

Schedule B  
(Form 990)  
Name of the organization: MUSEUM OF THE NEW SOUTH, INC.  
Employer identification number: 56-1748648

Organization type (check one):

Filers of:  
Form 990 or 990-EZ  
☐ 501(c)(3) exempt private foundation  
☐ 4947(a)(1) nonexempt charitable trust  
☐ 527 political organization  
☐ 501(c)(3) taxable private foundation

Form 990-PF  
☐ 501(c)(3) exempt private foundation  
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation  
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the General Rule or a Special Rule.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule  
☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor’s total contributions.

Special Rules  
☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) $5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don’t complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling $5,000 or more during the year __________________________ $ ________________

Caution: An organization that isn’t covered by the General Rule and/or the Special Rules doesn’t file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn’t meet the filing requirements of Schedule B (Form 990).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.
**Part I**

<table>
<thead>
<tr>
<th>No.</th>
<th>Name, address, and ZIP + 4</th>
<th>Total contributions</th>
<th>Type of contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>$525,333.</td>
<td>Person <strong>X</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>$200,000.</td>
<td>Person <strong>X</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>$100,000.</td>
<td>Person <strong>X</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>$60,000.</td>
<td>Person <strong>X</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>$35,000.</td>
<td>Person <strong>X</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>$200,000.</td>
<td>Person <strong>X</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
</tbody>
</table>
**Part I  Contributors**

(see instructions). Use duplicate copies of Part I if additional space is needed.

<table>
<thead>
<tr>
<th>No.</th>
<th>Name, address, and ZIP + 4</th>
<th>Total contributions</th>
<th>Type of contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td></td>
<td>$90,000.</td>
<td>Person X Payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Noncash</td>
</tr>
</tbody>
</table>

(Complete Part II for noncash contributions.)
## Part II  Noncash Property

(see instructions). Use duplicate copies of Part II if additional space is needed.

<table>
<thead>
<tr>
<th>(a) No. from Part I</th>
<th>(b) Description of noncash property given</th>
<th>(c) FMV (or estimate) (See instructions.)</th>
<th>(d) Date received</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>$</td>
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<tr>
<td></td>
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<td></td>
<td></td>
<td>$</td>
<td></td>
</tr>
</tbody>
</table>
MUSEUM OF THE NEW SOUTH, INC.  

Part III  Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this info. once.) $ ________

Use duplicate copies of Part III if additional space is needed.

<table>
<thead>
<tr>
<th>(a) No. from Part I</th>
<th>(b) Purpose of gift</th>
<th>(c) Use of gift</th>
<th>(d) Description of how gift is held</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(e) Transfer of gift</th>
</tr>
</thead>
</table>

Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee

<table>
<thead>
<tr>
<th>Transferee's name, address, and ZIP + 4</th>
<th>Relationship of transferor to transferee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>(a) No. from Part I</th>
<th>(b) Purpose of gift</th>
<th>(c) Use of gift</th>
<th>(d) Description of how gift is held</th>
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</thead>
<tbody>
<tr>
<td></td>
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<th>(e) Transfer of gift</th>
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</table>

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<th>Relationship of transferor to transferee</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(a) No. from Part I</th>
<th>(b) Purpose of gift</th>
<th>(c) Use of gift</th>
<th>(d) Description of how gift is held</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(e) Transfer of gift</th>
</tr>
</thead>
</table>

Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee

<table>
<thead>
<tr>
<th>Transferee's name, address, and ZIP + 4</th>
<th>Relationship of transferor to transferee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

#### Part I

**Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.**

Complete if the organization answered “Yes” on Form 990, Part IV, line 6.

<table>
<thead>
<tr>
<th></th>
<th>(a) Donor advised funds</th>
<th>(b) Funds and other accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total number at end of year</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Aggregate value of contributions to (during year)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aggregate value of grants from (during year)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Aggregate value at end of year</td>
<td></td>
</tr>
</tbody>
</table>

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization’s property, subject to the organization’s exclusive legal control? Yes No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Yes No

#### Part II

**Conservation Easements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 **Purpose(s) of conservation easements held by the organization (check all that apply).**

   - Preservation of land for public use (for example, recreation or education)
   - Preservation of open space
   - Preservation of a historically important land area
   - Preservation of a certified historic structure
   - Preservation of a historic structure listed in the National Register

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

   - Held at the End of the Tax Year
   - 2a Total number of conservation easements
   - 2b Total acreage restricted by conservation easements
   - 2c Number of conservation easements on a certified historic structure included in (a)
   - 2d Number of conservation easements included in (c) acquired after July 25, 2006, and not on a historic structure listed in the National Register

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4 Number of states where property subject to conservation easement is located

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Yes No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization’s financial statements that describes the organization’s accounting for conservation easements.

#### Part III

**Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered “Yes” on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

1b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

   - Revenue included on Form 990, Part VIII, line 1
   - Assets included in Form 990, Part X

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

   - Revenue included on Form 990, Part VIII, line 1
   - Assets included in Form 990, Part X
### Part III

#### Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3. Using the organization’s acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
   - Public exhibition
   - Scholarly research
   - Preservation for future generations

4. Provide a description of the organization’s collections and explain how they further the organization’s exempt purpose in Part XIII.

5. During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization’s collection? Yes No

### Part IV

#### Escrow and Custodial Arrangements.

Complete if the organization answered “Yes” on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a. Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No

   If “Yes,” explain the arrangement in Part XIII and complete the following table:

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1c</td>
</tr>
<tr>
<td>1d</td>
</tr>
<tr>
<td>1e</td>
</tr>
<tr>
<td>1f</td>
</tr>
</tbody>
</table>

2a. Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No

   If “Yes,” explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII.

### Part V

#### Endowment Funds.

Complete if the organization answered “Yes” on Form 990, Part IV, line 10.

1a. Beginning of year balance

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>8,287,899</td>
<td>9,555,749</td>
<td>7,865,175</td>
<td>7,846,910</td>
<td>7,926,834</td>
</tr>
</tbody>
</table>

b. Contributions

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>395,300</td>
<td>206,455</td>
<td>397,600</td>
<td>76,700</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>585,700</td>
<td>-1,318,999</td>
<td>2,044,925</td>
<td>66,355</td>
<td>250,467</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>390,314</td>
<td>327,736</td>
<td>538,718</td>
<td>425,416</td>
<td>386,913</td>
</tr>
</tbody>
</table>

c. Net investment earnings, gains, and losses

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>18,587</td>
<td>16,415</td>
<td>22,088</td>
<td>20,274</td>
<td>20,176</td>
</tr>
</tbody>
</table>

d. Grants or scholarships

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>8,464,698</td>
<td>8,287,899</td>
<td>9,555,749</td>
<td>7,865,175</td>
<td>7,846,910</td>
</tr>
</tbody>
</table>

e. Administrative expenses

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>8,287,899</td>
<td>9,555,749</td>
<td>7,865,175</td>
<td>7,846,910</td>
<td></td>
</tr>
</tbody>
</table>

2. Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

   a. Board designated or quasi-endowment

   b. Permanent endowment %

   c. Term endowment %

   The percentages on lines 2a, 2b, and 2c should equal 100%.

3a. Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

   i. Unrelated organizations

   ii. Related organizations

   If “Yes” on line 3a(i), are the related organizations listed as required on Schedule R?

### Part VI

#### Land, Buildings, and Equipment.

Complete if the organization answered “Yes” on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

<table>
<thead>
<tr>
<th>Description of property</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(c) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buildings</td>
<td>26,969</td>
<td>13,693</td>
<td>13,276</td>
<td></td>
</tr>
<tr>
<td>Leasehold improvements</td>
<td>123,713</td>
<td>62,814</td>
<td>60,899</td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>100,399</td>
<td>50,976</td>
<td>49,423</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) 123,598.
### Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

<table>
<thead>
<tr>
<th>(a) Description of security or category (including name of security)</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Financial derivatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) Closely held equity interests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(A)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(B)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(C)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(E)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(F)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(G)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(H)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)

### Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)

### Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
</tbody>
</table>

Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)

### Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. **Description of liability**

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Federal income taxes</td>
<td></td>
</tr>
<tr>
<td>(2) LEASE LIABILITY</td>
<td><strong>4,571.</strong></td>
</tr>
</tbody>
</table>

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII [X]

---

Schedule D (Form 990) 2022
### Schedule D (Form 990) 2022

#### MUSEUM OF THE NEW SOUTH, INC.

**Page 4**

**Part XI | Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue, gains, and other support per audited financial statements</td>
<td>$2,393,132</td>
</tr>
<tr>
<td>2a</td>
<td>Net unrealized gains (losses) on investments</td>
<td>$585,700</td>
</tr>
<tr>
<td>2b</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>Recoveries of prior year grants</td>
<td></td>
</tr>
<tr>
<td>2d</td>
<td>Other (Describe in Part XIII.)</td>
<td>$86,522</td>
</tr>
<tr>
<td>2e</td>
<td>Add lines 2a through 2d</td>
<td>$672,222</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td>$1,720,910</td>
</tr>
</tbody>
</table>

**Part XII | Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total expenses and losses per audited financial statements</td>
<td>$3,133,618</td>
</tr>
<tr>
<td>2a</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>2b</td>
<td>Prior year adjustments</td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>Other losses</td>
<td></td>
</tr>
<tr>
<td>2d</td>
<td>Other (Describe in Part XIII.)</td>
<td>$86,522</td>
</tr>
<tr>
<td>2e</td>
<td>Add lines 2a through 2d</td>
<td>$86,522</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td>$3,047,096</td>
</tr>
</tbody>
</table>

**Part XIII | Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

---

**PART III, LINE 1A:**

**THE MUSEUM’S COLLECTION CONSISTS MAINLY OF ARTIFACTS RELATING TO THE CHARLOTTE AND PIEDMONT REGION OF THE CAROLINAS. IN ACCORDANCE WITH THE PRACTICE FOLLOWED BY MANY MUSEUMS, OBJECTS PURCHASED AND DONATED FOR PUBLIC EXHIBITION ARE NOT INCLUDED IN THE STATEMENT OF FINANCIAL POSITION. THIS IS PRIMARILY BECAUSE OF THE LACK OF RECORDS COVERING THE COST OR FAIR MARKET VALUE OF OBJECTS AND THE DIFFICULTY OF DETERMINING THE VALUE OF SUCH A COLLECTION. EACH ITEM IN THE COLLECTION IS CATALOGED, PRESERVED, AND CARED FOR, AND ACTIVITIES VERIFYING THEIR EXISTENCE AND ASSESSING THEIR CONDITION ARE PERFORMED CONTINUOUSLY. THE COLLECTIONS ARE SUBJECT TO A POLICY THAT REQUIRES PROCEEDS FROM THEIR SALES TO BE USED TO ACQUIRE OTHER ITEMS FOR COLLECTIONS.**
PART III, LINE 4:

THE MUSEUM'S COLLECTION CONSISTS MAINLY OF ARTIFACTS RELATING TO THE CHARLOTTE AND PIEDMONT REGION OF THE CAROLINAS.

PART V, LINE 4:

FUNDS RAISED FOR THE QUASI-ENDOWMENT ARE INTENDED FOR THE PRINCIPAL PURPOSE OF PROVIDING OPERATING CASH FLOW FOR THE MUSEUM FROM INCOME AND CAPITAL APPRECIATION GENERATED BY THE INVESTED FUNDS. BECAUSE OF THE NATURE OF THE QUASI-ENDOWMENT, UNDER EXTRAORDINARY CIRCUMSTANCES THE MUSEUM HAS THE AUTHORITY (WITH APPROVAL FROM THE BOARD OF DIRECTORS) TO USE ITS CORPUS FOR OPERATING NEEDS.

PART X, LINE 2:


PART XI, LINE 2D - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES 86,522.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES 86,522.
**Part I  Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1. Indicate whether the organization raised funds through any of the following activities. Check all that apply.
   - [ ] Mail solicitations
   - [ ] Internet and email solicitations
   - [ ] Phone solicitations
   - [ ] In-person solicitations
   - [ ] Solicitation of non-government grants
   - [ ] Solicitation of government grants
   - [ ] Special fundraising events

2. Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?  
   - Yes [ ]  No [ ]

   a. If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

<table>
<thead>
<tr>
<th>(i) Name and address of individual or entity (fundraiser)</th>
<th>(ii) Activity</th>
<th>(iii) Did fundraiser have custody or control of contributions?</th>
<th>(iv) Gross receipts from activity</th>
<th>(v) Amount paid to (or retained by) fundraiser listed in col. (i)</th>
<th>(vi) Amount paid to (or retained by) organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

   ____________________________________________
   ____________________________________________
   ____________________________________________
   ____________________________________________
   ____________________________________________
### Part II Fundraising Events

Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

<table>
<thead>
<tr>
<th>CATALOG</th>
<th>(a) Event #1</th>
<th>(b) Event #2</th>
<th>(c) Other events</th>
<th>(d) Total events</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(event type)</td>
<td>(event type)</td>
<td>(total number)</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Gross receipts</td>
<td>153,252.</td>
<td></td>
<td>153,252.</td>
</tr>
<tr>
<td>2</td>
<td>Less: Contributions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Gross income (line 1 minus line 2)</td>
<td>153,252.</td>
<td></td>
<td>153,252.</td>
</tr>
<tr>
<td>4</td>
<td>Cash prizes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Noncash prizes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Rent/facility costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Food and beverages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Entertainment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Other direct expenses</td>
<td>86,522.</td>
<td></td>
<td>86,522.</td>
</tr>
<tr>
<td>10</td>
<td>Direct expense summary. Add lines 4 through 9 in column (d)</td>
<td></td>
<td></td>
<td>86,522.</td>
</tr>
<tr>
<td>11</td>
<td>Net income summary. Subtract line 10 from line 3, column (d)</td>
<td></td>
<td></td>
<td>66,730.</td>
</tr>
</tbody>
</table>

### Part III Gaming

Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

<table>
<thead>
<tr>
<th></th>
<th>(a) Bingo</th>
<th>(b) Pull tabs/instant bingo/progressive bingo</th>
<th>(c) Other gaming</th>
<th>(d) Total gaming (add col. (a) through col. (c))</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Gross revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Cash prizes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Noncash prizes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Rent/facility costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Other direct expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Volunteer labor</td>
<td>[ ] Yes</td>
<td>[ ] %</td>
<td>[ ] Yes</td>
<td>[ ] %</td>
</tr>
</tbody>
</table>

7 Direct expense summary. Add lines 2 through 5 in column (d)

8 Net gaming income summary. Subtract line 7 from line 1, column (d)

9 Enter the state(s) in which the organization conducts gaming activities:

a Is the organization licensed to conduct gaming activities in each of these states? [ ] Yes [ ] No

b If "No," explain:

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? [ ] Yes [ ] No

b If "Yes," explain:
11 Does the organization conduct gaming activities with nonmembers? 

12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?

13 Indicate the percentage of gaming activity conducted in:
   a The organization’s facility
   b An outside facility

14 Enter the name and address of the person who prepares the organization’s gaming/special events books and records:

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? 

   b If "Yes," enter the amount of gaming revenue received by the organization and the amount of gaming revenue retained by the third party.

   c If "Yes," enter name and address of the third party:

16 Gaming manager information:

17 Mandatory distributions:
   a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? 
   b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization’s own exempt activities during the tax year.

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**Part IV** Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

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## Compensation Information

### Part I: Questions Regarding Compensation

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1a</strong> Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First-class or charter travel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel for companions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax indemnification and gross-up payments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discretionary spending account</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing allowance or residence for personal use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payments for business use of personal residence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health or social club dues or initiation fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal services (such as maid, chauffeur, chef)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1b</strong> If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If &quot;No,&quot; complete Part III to explain</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2</strong> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>3</strong> Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compensation committee</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Independent compensation consultant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form 990 of other organizations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Written employment contract</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Compensation survey or study</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval by the board or compensation committee</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>4</strong> During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Receive a severance payment or change-of-control payment</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>b. Participate in or receive payment from a supplemental nonqualified retirement plan</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>c. Participate in or receive payment from an equity-based compensation arrangement</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>If &quot;Yes&quot; to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>5</strong> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>a. The organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Any related organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If &quot;Yes&quot; on line 5a or 5b, describe in Part III.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6</strong> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>a. The organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Any related organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If &quot;Yes&quot; on line 6a or 6b, describe in Part III.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7</strong> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If &quot;Yes,&quot; describe in Part III</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td><strong>8</strong> Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If &quot;Yes,&quot; describe in Part III</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td><strong>9</strong> If &quot;Yes&quot; on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**Notes:**

- Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.
- LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.
**Part II**

**Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren’t listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation</th>
<th>(C) Retirement and other deferred compensation</th>
<th>(D) Nontaxable benefits</th>
<th>(E) Total of columns (B)(i)-(D)</th>
<th>(F) Compensation in column (B) reported as deferred on prior Form 990</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) KATHRYN HILL</td>
<td>(i) 151,817. 50,000. 0. 8,099. 0. 209,916. 0.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRESIDENT &amp; CEO</td>
<td>(i) 0. 0. 0. 0. 0. 0. 0.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MUSEUM OF THE NEW SOUTH, INC. 56-1748648

Part III  Supplemental Information

Schedule J (Form 990) 2022

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.
FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
SOUTH THROUGH EXHIBITS THAT EXPLORE COMPLEX CHAPTERS IN THE REGION'S HISTORY AND PROGRAMS THAT LAUNCH DIALOGUE, FOSTER EMPATHY, AND BUILD AN EQUITABLE COMMUNITY.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:
FOR 30 YEARS, LEVINE MUSEUM OF THE NEW SOUTH HAS EXPLORED THE REGION'S HISTORY THROUGH EXHIBITS, EDUCATIONAL PROGRAMS, AND DIALOGUES THAT PROVIDE CONTEXT AROUND CONTEMPORARY ISSUES, TACKLE IMPORTANT QUESTIONS, AND ENCOURAGE NECESSARY COMMUNITY DIALOGUE. LEVINE MUSEUM IS A CIVIC AND EDUCATIONAL INSTITUTION LOCATED IN CENTER CITY CHARLOTTE OFFERING DIGITAL EXPERIENCES, ON-SITE EXHIBITS, AND PROGRAMMING FOR ADULTS, FAMILIES, CHILDREN, AND SCHOOL AUDIENCES. THE MUSEUM HAS EARNED A LOCAL, NATIONAL, AND INTERNATIONAL REPUTATION FOR CREATING INNOVATIVE AND GROUND-BREAKING EXHIBITS AND PROGRAMS THAT USE HISTORY TO BUILD COMMUNITY.

LEVINE MUSEUM REALIZED THE FOLLOWING ACCOMPLISHMENTS IN FISCAL YEAR 2023:
- OPENED A GALLERY IN THE HEART OF UPTOWN CHARLOTTE FREE TO THE PUBLIC IN OCTOBER 2022;
- SHOWED FOUR TRAVELING/TEMPORARY EXHIBITIONS, INCLUDING MEN OF CHANGE: POWER. TRUTH. TRIUMPH., A TRAVELING EXHIBIT FROM THE SMITHSONIAN INSTITUTION TO INAUGURATE THE MUSEUM'S NEW SPACE;
- BOOKED TRAVELING EXHIBITION CO-CREATED WITH GRIER HEIGHTS COMMUNITY.
TO BE DISPLAYED IN COMMUNITY SPACES FOR AT LEAST THE NEXT YEAR;

- BEGAN WORK ON A NEW CHARLOTTE HISTORY EXHIBITION WITH AN
AWARD-WINNING TEAM;

- LAUNCHED TWO NEW SCHOOL OFFERINGS SUCCESSFUL PROFESSIONAL
DEVELOPMENT WORKSHOPS FOR TEACHERS AND FIELD TRIPS IN THE CITY, WHICH
TAKES STUDENTS ON AN AUGMENTED-REALITY ENHANCED WALKING TOUR OF THE
FORMER BROOKLYN NEIGHBORHOOD IN CHARLOTTE;

- ADDED SIX FULL TIME STAFF POSITIONS AND CONDUCTED A NATIONAL SEARCH
FOR A CEO;

- WROTE AND ADOPTED A DEAI STATEMENT;

- REDESIGNED ITS WEBSITE, IMPROVING ITS SPEED AND FUNCTIONALITY FOR
MORE DIGITAL CONTENT.

FORM 990, PART VI, SECTION B, LINE 11B:

THE AUDITOR WILL PRESENT THE COMPLETED FORM 990 TO THE MUSEUM'S AUDIT
COMMITTEE AT A DULY-NOTICED MEETING OF THAT COMMITTEE. REPRESENTATIVES OF
THE AUDITOR WILL ATTEND THAT MEETING TO DISCUSS THE FORM 990. AFTER THE
AUDIT COMMITTEE APPROVES THE FORM 990, THE CONTROLLER WILL CIRCULATE THE
FORM 990 TO ALL BOARD MEMBERS BY EMAIL ON BEHALF OF AUDIT COMMITTEE CHAIR
AND/OR THE BOARD CHAIR. THIS EMAIL WILL PROVIDE BOARD MEMBERS WITH AN
EXPLANATION OF THE AUDIT COMMITTEE'S REVIEW OF THE FORM 990 AND WILL INVITE
BOARD MEMBERS TO CONTACT THE AUDIT COMMITTEE CO-CHAIRS OR THE BOARD CHAIR
WITH ANY QUESTIONS OR COMMENTS ABOUT THE FORM 990. THEREAFTER, THE MUSEUM
WILL FILE THE FORM 990.

FORM 990, PART VI, SECTION B, LINE 12C:

EACH MEMBER OF THE BOARD OF DIRECTORS IS REQUIRED ANNUALLY TO REVIEW THE

FORM 990, PART VI, SECTION B, LINE 15:
THE BOARD CHAIR REVIEWED PUBLICLY-AVAILABLE INFORMATION ON CEO COMPENSATION FROM COMPARABLE CULTURAL NON-PROFIT ORGANIZATIONS IN THE CHARLOTTE METROPOLITAN AREA AND DETERMINED THAT THE MUSEUM'S CEO TOTAL COMPENSATION WAS WELL WITHIN THE NORMS FOR THIS COMPARISON GROUP. THE MUSEUM DOES NOT CONSIDER ANY OTHER EMPLOYEE OF THE MUSEUM TO BE A "KEY EMPLOYEE". THE MUSEUM DOES PERIODICALLY COMPARE ALL STAFF SALARIES TO COMPARABLE POSITIONS IN THE CHARLOTTE MARKET AND TO OTHER MUSEUMS IN THE SOUTHEASTERN US.

FORM 990, PART VI, SECTION C, LINE 18:
PHOTOCOPIES OF THE FORM 1023 AND RECENT FILINGS OF THE FORM 990 AND 990-T ARE AVAILABLE UPON REQUEST AT THE ORGANIZATION'S ADMINISTRATIVE OFFICE. IN ADDITION, THE MOST RECENT FILING OF THE FORM 990 IS AVAILABLE ONLINE AT WWW.MUSEUMOFTHENEW SOUTH.ORG/GIVING/ AND WWW.GUIDESTAR.ORG.

FORM 990, PART VI, SECTION C, LINE 19:
PHOTOCOPIES OF THE ORGANIZATION'S FINANCIAL STATEMENTS, GOVERNING DOCUMENTS, AND CONFLICT OF INTEREST POLICY ARE AVAILABLE UPON REQUEST AT THE ORGANIZATION'S ADMINISTRATIVE OFFICE.
FORM 990, PART IX, LINE 11G, OTHER FEES:

<table>
<thead>
<tr>
<th>OTHER PROFESSIONAL FEES:</th>
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<tbody>
<tr>
<td>PROGRAM SERVICE EXPENSES</td>
<td>112,761.</td>
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<tr>
<td>MANAGEMENT AND GENERAL EXPENSES</td>
<td>215,325.</td>
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<tr>
<td>FUNDRAISING EXPENSES</td>
<td>0.</td>
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<tr>
<td>TOTAL EXPENSES</td>
<td>328,086.</td>
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TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A 328,086.

FORM 990, PART XII, LINE 2C:

THE PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR.