

## EXEMPTION APPLICATION

(To be made only by a principal officer of the organization claiming exemption)

To be filed in duplicate  
with the District Director  
for your District.

For use of organizations applying for exemption under section 501(a) and described in section 501(c)(3) of the Internal Revenue Code, which are organized and operated (or will operate) exclusively for one or more of the following purposes (check purpose(s)):

- ☐ Religious ☐ Charitable ☐ Scientific ☐ Testing for Public Safety  
☒ Educational ☐ For the prevention of cruelty to children or animals ☐ Literary

Every organization that claims to be exempt must furnish the information and data specified in duplicate. If any organization fails to submit the information and data required, this application will not be considered on its merits and the organization will be notified accordingly.

This application shall be open to public inspection in accordance with section 6104(a)(1) of the Internal Revenue Code. See separate instructions for Form 1023 to properly answer the questions below.

1a. Full name of organization <b>Florida Technological University Foundation, Inc.</b>			b. Employer identification number <b>None</b>					
2. Complete address (number, street, city or town, State and Postal ZIP code) <b>Alafaya Trail, Orlando, Florida 32816</b>								
3a. Is the organization incorporated? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		b. If "Yes," in which State and under which law (General corporation, not for profit, membership, educational, eleemosynary, etc.)? Cite statutory provisions. <b>Florida - Corporation not for profit, Chap. 617 Fla. Statutes</b>						
4a. If not incorporated, what is form of organization? <b>N/A</b>		b. Date incorporated or organized <b>2/6/68</b>		c. Month and day on which the annual accounting period ends <b>12/31/68</b>				
5a. Has organization filed Federal income tax return(s)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		b. If "Yes," form number of return filed and Internal Revenue District where filed. <b>None</b>		c. Year(s) filed <b>None</b>				
6. After July 1, 1950, did the creator of your organization (if a trust), or a contributor to your organization, or a brother or sister (whole or half blood), spouse, ancestor, or lineal descendant of such creator or contributor, or a corporation controlled directly or indirectly by such creator or contributor, enter into any of the transactions (or activities) enumerated below? NOTE: If you have any knowledge or contemplate that you will be a party to any of the transactions (or activities) enumerated in 6a through 6i, check "planned" in the applicable block(s) and see instructions.								
a. Borrow any part of your income or corpus?		Yes	No	Planned	d. Purchase any securities or other property from you?	Yes	No	Planned
			X				X	
b. Receive any compensation from you?			X		e. Sell any securities or other property to you?		X	
c. Have any part of your services made available to him?			X		f. Receive any of your income or corpus in any other transaction?		X	
7. Have you issued or do you plan to issue membership, stock, or other certificates evidencing voting power in the organization?						Yes	No	
							X	
8a. Are you the outgrowth or continuation of any form of predecessor(s)?							X	
b. Do you have capital stock issued and outstanding?							X	
c. Have you made or do you plan to make any distribution of your property to shareholders or members?							X	
d. Did you receive or do you expect to receive 10 percent or more of your assets from any organization, group of affiliated organizations (affiliated through stockholding, common ownership, or otherwise), any individual, or members of a family group (brother or sister whether whole or half blood, spouse, ancestor, or lineal descendant)?							X	
e. Does any part or will any part of your receipts represent payment for services of any character rendered or to be rendered by you?							X	
f. Are you now, have you ever been, or do you plan to be engaged in carrying on propaganda, or otherwise advocating or opposing pending or proposed legislation?							X	
g. Do you participate or plan to participate in or intervene in (including the publishing or distributing of statements) any political campaign on behalf of or in opposition to any candidate for public office?							X	
h. Have you made or do you plan to make any payments to members or shareholders for services rendered or to be rendered?							X	
i. Does any part or do you plan to have any part of your net income inure to the benefit of any private shareholder or individual?							X	
j. Are you now or are you planning to be affiliated in any manner with any organization(s)?							X	
k. Do you hold or plan to hold 10 percent or more of any class of stock or 10 percent or more of the total combined voting power of stock in any corporation?							X	

State of any court (including a Court of Probate, Surrogate's Court, etc.) ever declared whether you were or were not organized and operated for charitable, etc., purposes? ☐ Yes ☒ No. If "Yes," attach copies in duplicate of pertinent administrative or judicial decisions.

10. You must attach copies in duplicate of the following:

a. If incorporated, a copy of your articles of incorporation, or if not incorporated, a copy of your constitution, articles of association, declaration of trust, or other document whereby you were created setting forth your aims and purposes, a copy of all amendments thereto, and any changes presently proposed.

b. A copy of your bylaws or other similar code of regulations, all amendments thereto, and any changes presently proposed.

c. A complete statement of assets and liabilities as of the end of each annual accounting period (or as of the date of the filing of this application, if you were in existence for less than a year). None

d. A statement of receipts and expenditures for each annual accounting period of operation (or for the period for which you were in existence, if less than a year). None

(See Charter)

e. A statement which clearly indicates what State statutes or court decisions govern the distribution of assets upon dissolution. (This statement may be omitted if your charter, certificate, or other instrument of organization makes provision for such distribution.)

(See statement attached)

f. A brief statement of the specific purposes for which you were formed. (Do not quote from or make reference to your articles of incorporation, constitution, articles of association, declaration of trust, or other document whereby you were created for this question.)

(See statement attached)

g. A statement explaining in detail each fund-raising activity and each business enterprise you have engaged in or plan to engage in, accompanied by copies of all agreements, if any, with other parties for the conduct of each fund-raising activity or business enterprise.

h. A statement which describes in detail the nature of each of your activities which you have checked on page 1, activities which you sponsor, and proposed activities. None

i. A statement which explains fully any specific activities that you have engaged in or sponsored and which have been discontinued. Give dates of commencement and termination and the reasons for discontinuance. None

(See statement attached)

j. A statement which describes the purposes, other than in payment for services rendered or supplies furnished, for which your funds are expended or will be expended.

(See statement attached)

k. A schedule indicating the name and position of each officer, director, trustee, etc., of the organization and the relationship, if any, by blood, marriage, adoption, or employment, of each such person to the creator of the organization (if a trust), to any person who has made a substantial contribution to the organization, or to a corporation controlled (by ownership of 50 percent or more of voting stock or 50 percent or more of value of all stock), directly or indirectly, by such creator or contributor. The schedule shall also indicate the time devoted to position and compensation (including salary and expense account allowance), if any, of each officer, director, trustee, etc., of the organization.

l. A copy of each lease, if any, in which you are the lessee or lessor of property (real, personal, gas, oil, or mineral) or in which you own an interest under such lease, together with copies of all agreements with other parties for development of the property. None

### SIGNATURE AND VERIFICATION

Under penalties of perjury, I declare that I have examined this application, including accompanying statements, and to the best of my knowledge and belief it is true, correct, and complete.

8-1-68

Date

*C. T. Anderson Jr.*

Signature of officer

President

Title

Exemption Application - Form 1023  
Florida Technological University  
Foundation, Inc.

10. f. Florida Technological University Foundation, Inc. has been formed for the purpose of providing a foundation to accept donations made to it for the purpose of granting scholarships and loans to students in attendance at Florida Technological University.
10. g. The corporation has not yet engaged in any fund raising activities or business enterprises. The corporation plans to solicit donations to the foundation from individuals, corporations, partnerships and such other sources as may be willing to contribute to such a fund. The corporation has not accepted any funds to date because the Trustees prefer to delay acceptance of funds until an exemption is granted by the Internal Revenue Service.
10. j. Expenditure of funds by the corporation will be limited to the granting of scholarships and loans at Florida Technological University and the payment of administrative expenses in operating the foundation.
10. k.
- |                           |                     |
|---------------------------|---------------------|
| Charles O. Andrews        | President - Trustee |
| J. Walter Tucker, Jr.     | V. Pres. - Trustee  |
| Murray W. Overstreet, Jr. | V. Pres. - Trustee  |
| Douglas Stenstrom         | V. Pres. - Trustee  |
| John Philip Goree         | Secretary - Trustee |
| D. Keith Abele            | Treasurer - Trustee |
| Ralph H. Kennedy          | Trustee             |
| William G. Mateer         | Trustee             |
| W. A. McCree, Jr.         | Trustee             |
| Charles N. Millican       | Trustee             |
| Louis C. Murray           | Trustee             |
| H. C. Sanderson, Jr.      | Trustee             |
| Allen Trovillion          | Trustee             |
| Robert L. Wagner          | Trustee             |
| Joel R. Wells, Jr.        | Trustee             |
| W. R. Winn, Jr.           | Trustee             |
| L. K. Edward              | Trustee             |

The foregoing individuals have agreed to devote such time as may be required to carry out the purposes for which the corporation was formed without compensation.

## US Treasury Department

District Director  
Internal Revenue Service

Date:

In reply refer to:

August 14, 1968 | 434:RAR:eds  
JAX:FO:68-356

Florida Technological University  
Foundation, Inc.  
Alafaya Trail  
Orlando, Florida 32816

Gentlemen:

Purpose: Educational

Address Inquiries and File Returns with District

Director of Internal Revenue: Jacksonville

Form 990-A Required: ☒ Yes ☐ NoAccounting Period Ending: December 31

On the basis of your stated purposes and the understanding that your operations will continue as evidenced to date or will conform to those proposed in your ruling application, we have concluded that you are exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code. Any changes in operation from those described, or in your character or purposes, must be reported immediately to your District Director for consideration of their effect upon your exempt status. You must also report any change in your name or address.

You are not required to file Federal income tax returns so long as you retain an exempt status, unless you are subject to the tax on unrelated business income imposed by section 511 of the Code, in which event you are required to file Form 990-T. Our determination as to your liability for filing the annual information return, Form 990-A, is set forth above. That return, if required, must be filed on or before the 15th day of the fifth month after the close of your annual accounting period indicated above.

Contributions made to you are deductible by donors as provided in section 170 of the Code. Bequests, legacies, devises, transfers or gifts to or for your use are deductible for Federal estate and gift tax purposes under the provisions of section 2055, 2106 and 2522 of the Code.

You are not liable for the taxes imposed under the Federal Insurance Contributions Act (social security taxes) unless you file a waiver of exemption certificate as provided in such act. You are not liable for the tax imposed under the Federal Unemployment Tax Act. Inquiries about the waiver of exemption certificate for social security taxes should be addressed to this office, as should any questions concerning excise, employment or other Federal taxes.

This is a determination letter.

Very truly yours,

*A. J. O'Donnell, Jr.*  
A. J. O'Donnell, Jr.  
District Director

FINANCE & ACCOUNTS  
F. J. O'DONNELL  
FORM L-17 (REV. 11-67)

Internal Revenue Service  
District Director

Department of the Treasury

Date: February 20, 1980

Person to Contact:

C. Lannom

Telephone Number:

904 791-3425

Refer Reply to:

158

Your Letter Dated:

January 3, 1979

Internal Revenue Code Section:

501(c)(3)

Our Exemption Letter Dated:

August 14, 1968

University of Central Florida  
Foundation, Inc.  
% Dr. W. K. Grasty  
P. O. Box 25000  
Orlando, Fl. 32816

Gentlemen:

We have received your letter requesting confirmation of your exemption from Federal income tax.

You were granted exemption from Federal income tax under the above cited section of the Internal Revenue Code.

The tax exempt status granted by our letter referred to above is currently in effect and will remain in effect until terminated, modified or revoked by the Internal Revenue Service.

Any change in your purposes, character, or method of operation must be reported to us so we may consider the effect of the change on your exempt status. You must also report any change in your name and address.

Thank you for your cooperation.

Sincerely yours,

*Charles O. De Witt*

District Director

Item Changed

From

To

Name

Florida Technological  
University Foundation, Inc.

University of Central  
Florida Foundation, Inc