Financial Report for Princeton Classes 1937-2013:

CLASS YEAR: 1958
July 1, 2013 - June 30, 2014

I. Class Dues and Dues Arrears

A.	Total number on Active Mail Roll *(as of July 1, 2013)*	602
B.	Number of dues payers for year *(paid through June 30, 2014)*	301
C.	Percentage of dues payers for year *(Item A into Item B)*	50%
D.	Dues rate	$ 50.00
E.	Dates of dues notice mailings issued for the year Sept 2013, March 2014, ______	
F.	Dues rate for your next fiscal year	$ 50.00
G.	Arrears billings: ( ) *Yearly* ( ) *Every* ___ *year(s)* ( ) *Occasionally* or (✓) *Never*	

II. Cash Receipts

A.	Membership dues		$ 16,313.00
B.	Reunion fees		
C.	Gifts & contributions:		
	- Cash		
	- Non-cash *(attach a statement with the following information provided for each gift: describe property, provide date received & value)*		$ 91.95
D.	Interest *(see instructions)*		
E.	Dividends *(see instructions)*		
F.	Gain (Loss) from sale of securities *(see instructions, attach a statement* with required information)		
G.	Other cash receipts *(e.g. class functions, miscellaneous)* (Describe type and amount of each)		
	1) May 1, 2014 NYC Luncheon	$ 2,125.00	
	2)	$	
	3)	$	
	Total other cash receipts		$2,125.00
H.	Payments from Princeton University		0
	Total Cash Receipts		$ 18,529.95 (1)

III. Cash Disbursements

A.	Office expenses (supplies, telephone, postage, mailings, bank fees)		$ 6,015.97
B.	Information technology (e.g. hardware, software, support services such as website design, virus protection)		$ 1,950.00
C.	PAW subscriptions		$ 8,584.78
D.	Travel		$ 541.80
E.	Alumni council dues		$ 400.00
F.	Reunions (Princeton Band)		
G.	Transfers to Princeton *(contributions, e.g. payments for annually-funded scholarships)* Please describe purpose of transfer		
H.	Insurance		
I.	Other cash disbursements *(e.g. class functions, miscellaneous)* (Describe type and amount of each)		
	1) May 1, 2014 NYC Luncheon	$ 2,999.78	
	2)	$	
	3)	$	
	4)	$	
	5)	$	
	Total other cash disbursements		$2,999.78
J.	Payments to Princeton University		0
	Total Cash Disbursements		$ 20,492.33 (2)

Excess (Deficit) for the year [Total Cash Receipts less Total Cash Disbursements]:
Line (1) minus Line (2) $ (1,962.38) (3)

Class Financial Report

IV. Assets - Beginning of Current Fiscal Year (7/1/13)

(*Exclude* class memorial insurance funds, scholarship and other funds already given to the University. *Include* all other funds including all separate reunion funds, as well as those held by the University.) ***These numbers must equal the prior year's ending assets.***

Name	Account Type	Purpose	Amount
Please indicate: (Name of bank or investment fund)	**Please indicate:** (No interest, interest bearing or dividend producing)	**Please indicate:** (e.g., reunion fund, special funds, undesignated)	
First Constitution Bank	Interest Bearing	General Class Funds	$43,774.45

Total $43,774.45 (4)

V. Assets - End of Current Fiscal Year (6/30/14)

(*Exclude* class memorial insurance funds, scholarship and other funds already given to the University. *Include* all other funds including all separate reunion funds, as well as those held by the University.)

Name	Account Type	Purpose	Amount
Please indicate: (Name of bank or investment fund)	**Please indicate:** (No interest, interest bearing or dividend producing)	**Please indicate:** (e.g., reunion fund, special funds, undesignated)	
First Constitution Bank	Interest Bearing	General Class Funds	$41,762.07

Total $41,762.07 (5)

TOTAL Line (3) plus Line (4) $ 41,762.07 (6)

NOTE: Lines (5) and (6) MUST EQUAL each other.

VI. Are there any accounts receivable *(amounts due **from** others) or accounts payable (amounts due **to** others)* as of June 30, 2014? (*Please estimate where exact amounts are not known and indicate the type of revenue/expense.)*

	Amount	Description
Receivable:	$	
Payable:	$	

Supplemental questions required by IRS Form 990 for the fiscal year
July 1, 2013 - June 30, 2014.

If you are uncertain about the answers to the following questions, please check with the other officers of your Organization as necessary to help answer the questions.

Question 1. Reference: Form 990 Part VI, Line 2.

To the best of your knowledge, are any of the Organization's officers or trustees related to each other, or to a third party who was paid by the Organization during the 2014 fiscal year?

Note: For purposes of this question and Question 3 below, "related" means a family or business relationship.

"family relationships" include any of the following:
spouses, parents and grandparents, children, grandchildren, great-grandchildren, siblings, and the spouses of children, grandchildren, great-grandchildren, and siblings

"business relationships" include any of the following:
1) One individual is employed by the other or by an organization in which the other is a trustee, director, officer, key employee or greater-than-35% owner, or
2) Two or more individuals are each a trustee, director, officer or greater-than-10% owner of the same business, or
3) Two or more individuals engaged in non-routine business dealings (not using customary terms or outside of either participant's normal business practice) exceeding $10,000 in value during the year.

Note: Please exclude privileged business relationships (attorney/client, physician/patient or religious) from disclosure.

Yes ________ No ✓

If the answer is "Yes" to Question 1, please attach a statement that identifies the individual(s) or business(es), and indicate whether it is a family or business relationship.

Question 2. Reference: Form 990 Part VII, Line 1a.

Did any of the Organization's officers or trustees receive compensation or benefits (taxable or non-taxable) from Princeton University during the 2014 fiscal year?

Yes ________ No ✓

If the answer is "Yes" to Question 2, please attach a statement that identifies the individual(s).

Question 3. Reference: Form 990, Schedule L, Part II, III & IV.

To the best of your knowledge, did the Organization either directly or indirectly engage in any of the following acts with any of it's current or former trustees, officers, or related parties:

A. Sale, exchange or leasing of property?
B. Lending of money or other extension of credit?
C. Payment of compensation (*or payment or reimbursement of expenses if more than $10,000?*)
D. Transfer of any part of it's income or assets?
E. First class, charter or travel for companions?
F. Tax indemnification and gross-up payments?
G. Discretionary spending account?
H. Housing allowance or residence for personal use?
I. Payments for business use of personal residence?
J. Health or social club dues?
K. Personal services (*e.g. maid, chauffer, chef?*)
L. Furnishing of goods, services, or facilities?

Yes ________ No ✓

If the answer is "Yes" to Question 3, please attach a statement explaining the transactions. The statement should include whether the organization followed a written policy and required substantiation of the accounts prior to payment.

Question 4. Reference: Form 990, Part VI, Line 4.

Has the Organization engaged in any activities not included in the governing documents of the Organization? (*Anything unusual?*)

Yes ________ No ✓

If the answer is "Yes" to Question 4, please attach a statement explaining the transactions.

Question 5. Reference: Form 990, Part VII, Section B.

Did the Organization have any vendors or persons that were paid more than $100,000 for services during the current fiscal year, including the University?

Yes ________ No ✓

If the answer is "Yes" to Question 5, please attach a statement identifying the name, address, type of service received, and the amount paid.

Question 6. Reference: Form 990, Part IV, Question 3.

During the year, did the Organization attempt to influence national, state or local legislation or elections including any attempt to influence public opinion on a legislative matter or referendum?

Yes ________ No ✓

If the answer is "Yes" to Question 6, please provide the following details:

A. Describe the activities conducted:
B. Expenditures related to a political campaign (*candidates election*):
C. Volunteer hours related to a political campaign (*candidates election*):
D. Expenditures to influence public opinion (*grass roots lobbying*):
E. Expenditures to influence legislators (*direct lobbying*):
F. Other exempt purpose expenditures:

Question 7. Reference: Form 990, Part IV, Question 2.

Did the Organization receive any contribution of $5,000 or more during the year?

Yes ________ No ✓

If the answer is "Yes" to Question 7, please attach a statement identifying the name and address of the contributor, the total amount received, and the date of the contribution.

Question 8. Reference: Form 990, Part IV, Question 18.

Did the Organization sponsor an event that had as it's intended purpose both an educational program and a fundraising solicitation?

Yes ________ No ✓

If the answer is "Yes" to Question 8, please estimate the costs directly attributable to the program portion $ __________ and the fundraising portion $ __________.

If the total revenue generated from events exceeded $15,000, please provide the following detail for each event for which revenue exceeded $5,000:

A. Gross receipts:
B. Charitable contribution received:
C. Cash prizes awarded:
D. Non-cash prizes awarded:
E. Rent/facility cost:
F. Food and beverages:
G. Entertainment:
H. Other direct expenses:

Under penalty of perjury, I hereby state that the foregoing information is correct and complete to the best of my knowledge and belief, and that The Trustees of Princeton University is authorized to include the information in the group return.

Class Year: 1958 Date: 29 July '14

Treasurer's name: Joseph D. Roxe Signature: [signature]
(Please print or type)

Please send the completed financial report to:

Daniel Sherman
Office of Finance & Treasury, Tax Department
Princeton University
701 Carnegie Center, Suite 445
Princeton, NJ 08540
dsherman@princeton.edu