**Return of Organization Exempt From Income Tax** 

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.

Open to Public

Department of the Treasury Internal Revenue Service Go to www.irs.gov/Form990 for instructions and the latest information.

AF	or the	2022 calendar year, or tax year beginning and	enaing		
<b>B</b> c	heck if pplicable	C Name of organization		D Employer identifi	cation number
	Addres	S ASPEN HISTORICAL SOCIETY			
	Name change	Doing business as		84-60377	56
	Initial return Final	Number and street (or P.O. box if mail is not delivered to street address) 620 W BLEEKER ST	Room/suite	E Telephone numbe 970-925-	
	return/ termin- ated	City or town, state or province, country, and ZIP or foreign postal code		G Gross receipts \$	1,966,911.
	Ameno			H(a) Is this a group re	
	return Applica	·	J	for subordinates	
	tion pendin	SAME AS C ABOVE	•		
	-0., 0.,		or E07	H(b) Are all subordinates in	list. See instructions
	Vebsit		or 527	H(c) Group exemption	
		organization: X Corporation Trust Association Other	I Voor		<b>VI</b> State of legal domicile: <b>CO</b>
Pa		Summary	L Teal	or formation. ±505 1	VI State of legal domicile.
	_	Briefly describe the organization's mission or most significant activities: HISTO	ORTCAL	MIISEIIM AND	ARCHIVE
e		FOR COMMUNITY OF AND SURROUNDING ASPEN, C			111(01111111
Jan		Check this box if the organization discontinued its operations or dispos			eete
Activities & Governance	-			3	17
Ĝ	l	Number of independent voting members of the governing body (Part VI, line 1b)			16
<u>«</u> ۆ		Fotal number of individuals employed in calendar year 2022 (Part V, line 2a)			16
iţie		Fotal number of volunteers (estimate if necessary)			20
ξ		Fotal unrelated business revenue from Part VIII, column (C), line 12			
Ā		Net unrelated business taxable income from Form 990-T, Part I, line 11			0.
		vet amouted business taxable moone nome of the overly fact, fine in		Prior Year	Current Year
	8	Contributions and grants (Part VIII, line 1h)		1,567,822.	1,531,858.
Jue	l	Program service revenue (Part VIII, line 2g)		123,486.	105,826.
Revenue	l	nvestment income (Part VIII, column (A), lines 3, 4, and 7d)		-23,828.	6,207.
æ	ı	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		17,078.	16,249.
	l	Fotal revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		1,684,558.	1,660,140.
		Grants and similar amounts paid (Part IX, column (A), lines 1-3)		0.	0.
	l	Benefits paid to or for members (Part IX, column (A), line 4)		0.	0.
"	ı	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		882,803.	904,571.
Expenses		Professional fundraising fees (Part IX, column (A), line 11e)		0.	0.
ber	b.	Total fundraising expenses (Part IX, column (D), line 25) 110, 34	44.		
Ă		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		452,511.	516,051.
		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		1,335,314.	
	ı	Revenue less expenses. Subtract line 18 from line 12		349,244.	239,518.
or		•		ginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)		4,847,508.	4,749,495.
ASS	21	Total liabilities (Part X, line 26)		228,183.	226,666.
Flet	22	Net assets or fund balances. Subtract line 21 from line 20		4,619,325.	4,522,829.
	ırt II	Signature Block			
Unde	er pena	ties of perjury, I declare that I have examined this return, including accompanying schedules	s and stateme	ents, and to the best of my	y knowledge and belief, it is
true,	correc	, and complete. Declaration of preparer (other than officer) is based on all information of wh	nich preparer	has any knowledge.	
Sigr	า	Signature of officer		Date	
Her	е	JACQUELINE HUTTON, CO-PRESIDENT			
		Type or print name and title			
		Print/Type preparer's name Preparer's signature		Date Check	PTIN
Paid		DENISE JURGENS, CPA DENISE JURGENS,	CPA	self-employ	
Prep	arer	Firm's name REESE HENRY & COMPANY, INC.		Firm's EIN 8	4-0803727
Use	Only	Firm's address 400 E MAIN ST STE 2		. –	
		ASPEN, CO 81611		Phone no. 9 7	0-925-3771
Мау	the IF	S discuss this return with the preparer shown above? See instructions			X Yes No

ASPEN HISTORICAL SOCIETY 84-6037756 <u>Page</u> **2** Part III | Statement of Program Service Accomplishments X Check if Schedule O contains a response or note to any line in this Part III Briefly describe the organization's mission: SEE SCHEDULE O Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? If "Yes," describe these new services on Schedule O. Did the organization cease conducting, or make significant changes in how it conducts, any program services? \_\_\_\_\_\_ Yes X No If "Yes," describe these changes on Schedule O. 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. 1,088,772. including grants of \$ 122,075. (Code: \_\_\_\_\_) (Expenses \$ ) (Revenue \$ MAINTAIN HISTORICAL MUSEUMS AND ARCHIVE SERVICE FOR PUBLIC. INCLUDES TOURS OF HISTORIC HOMES AND MAINTENANCE OF HISTORICAL SETTLEMENTS IN THE ASPEN, COLORADO AREA. PROVIDE EDUCATIONAL PROGRAMS ABOUT THE HISTORY OF THE ASPEN AREA AND THE UPPER ROARING FORK VALLEY AREA. THE MUSEUM SITES HAD 18,589 TOTAL VISITS DURING THE YEAR AND THE EDUCATIONAL PROGRAMS SERVED 114,322 INDIVIDUALS DURING THE YEAR. (Code: ) (Expenses \$ including grants of \$ (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ Other program services (Describe on Schedule O.) ) (Revenue \$ including grants of \$ 1,088,772. Total program service expenses

Form 990 (2022)

Form 990 (2022) ASPEN HISTORICAL SOCIETY
Part IV Checklist of Required Schedules 84-603<u>7756 Page</u> 3

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?		7.7	
	If "Yes," complete Schedule A	1	X	
2	Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	X	
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	3		X
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect	_		7,7
_	during the tax year? If "Yes," complete Schedule C, Part II	4		X
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	5		X
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	6		X
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	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete		v	
_	Schedule D, Part III	8	X	
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?	_		x
40	If "Yes," complete Schedule D, Part IV	9		
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments	40	v	
	or in quasi endowments? If "Yes," complete Schedule D, Part V	10	X	
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.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,		v	
	Part VI	11a	X	
D	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total	441.		x
_	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		
С	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total	44-		x
a	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII  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	11c		
u		11d		x
_	Part X, line 16? If "Yes," complete Schedule D, Part IX  Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		X
_		116		
f	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	11f		х
192	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete	- ' ''		
ıza	, , ,	12a		X
h	Schedule D, Parts XI and XII  Was the organization included in consolidated, independent audited financial statements for the tax year?	IZa		
b	If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		х
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		X
	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,	174		
	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	14b		x
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	15		Х
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	16		х
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	17	L	Х
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines			
	1c and 8a? If "Yes," complete Schedule G, Part II	18		X
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	19		X
20a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		X
	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
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 1? If "Yes," complete Schedule I, Parts I and II	21		Х

Form 990 (2022) ASPEN HISTORICAL SOCIETY

Part IV | Checklist of Required Schedules (continued)

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	Continued)							
			Yes	No				
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on			X				
00	Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22						
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If</i> "Yes," <i>complete</i>							
	Schedule J	23		x				
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the							
	last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete							
	Schedule K. If "No," go to line 25a	24a		Х				
b		24b						
	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease							
	any tax-exempt bonds?	24c						
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d						
25a	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit							
	transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		X				
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and							
	that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete							
	Schedule L, Part I	25b		X				
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current			1				
	or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%			x				
	controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II							
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,							
	creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled							
	entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	27		X				
28	Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV,							
	instructions for applicable filing thresholds, conditions, and exceptions):							
а	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor?     Factor   Factor	00-		x				
h	"Yes," complete Schedule L, Part IV	28a 28b		X				
	A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	200						
C		28c		x				
29	"Yes," complete Schedule L, Part IV  Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29		X				
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation			T				
-	contributions? If "Yes," complete Schedule M	30		х				
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31		Х				
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If</i> "Yes," <i>complete</i>							
	Schedule N, Part II	32		Х				
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations							
	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33		Х				
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and							
	Part V, line 1	34		X				
	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		X				
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity							
	within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b		<del></del>				
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?							
07	If "Yes," complete Schedule R, Part V, line 2	36		X				
37	0 ,							
20	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37		X				
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?  Note: All Form 990 filers are required to complete Schedule O	38	Х	1				
Par		30						
	Check if Schedule O contains a response or note to any line in this Part V							
	· · · · · · · · · · · · · · · · · · ·		Yes	No				
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable							
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable 1b 0							
С	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming							
	(gambling) winnings to prize winners?	1c	X	1				

ASPEN HISTORICAL SOCIETY

Statements Regarding Other IRS Filings and Tax Compliance (continued) Form 990 (2022)

Part V

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			Yes	No						
<b>2</b> a	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 16									
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	Х							
3а	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a		X						
	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b								
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a	_		7,7						
	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									
	See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			v						
5a	, , , , , , , , , , , , , , , , , , , ,	<u>5a</u> 5b		X						
b										
C Ga	, , , , , , , , , , , , , , , , , , , ,									
oa	a 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?									
h	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts	6a		X						
b	were not tax deductible?	6b								
7	Organizations that may receive deductible contributions under section 170(c).	OD								
и а	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		х						
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b								
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required									
·	to file Form 8282?	7с		х						
d	If "Yes," indicate the number of Forms 8282 filed during the year 7d									
е	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e								
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f								
g										
h										
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.									
а	a Did the sponsoring organization make any taxable distributions under section 4966?									
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b								
10	Section 501(c)(7) organizations. Enter:									
а	Initiation fees and capital contributions included on Part VIII, line 12									
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities									
11	Section 501(c)(12) organizations. Enter:									
	Gross income from members or shareholders 11a									
b	Gross income from other sources. (Do not net amounts due or paid to other sources against									
40-	amounts due or received from them.)	40-								
	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a								
ъ 13	If "Yes," enter the amount of tax-exempt interest received or accrued during the year									
	Is the organization licensed to issue qualified health plans in more than one state?	13a								
u	Note: See the instructions for additional information the organization must report on Schedule O.	104								
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									
С	Enter the amount of reserves on hand 13c									
	Did the organization receive any payments for indoor tanning services during the tax year?	14a		Х						
	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						
	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		Х						
	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								
	If "Yes," complete Form 6069.									

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

X

Form 990 (2022) ASPEN HISTORICAL SOCIETY 84-6037756 Page 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.

Sec	tion A. Governing Body and Management										
					Yes	No					
1a	Enter the number of voting members of the governing body at the end of the tax year	1a	17								
	If there are material differences in voting rights among members of the governing body, or if the governing			1							
	body delegated broad authority to an executive committee or similar committee, explain on Schedule O.										
b	Enter the number of voting members included on line 1a, above, who are independent	1b	16								
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship	p with a	any other	1							
	officer, director, trustee, or key employee?			2		х					
3	Did the organization delegate control over management duties customarily performed by or under the										
			•	3		х					
4	Did the organization make any significant changes to its governing documents since the prior Form S			4		Х					
5	Did the organization become aware during the year of a significant diversion of the organization's ass			5		Х					
6											
7a	7a 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?			7a		х					
b	b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or										
	persons other than the governing body?			7b		х					
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year										
а	The governing body?	-	-	8a	Х						
b	Each committee with authority to act on behalf of the governing body?			8b	Х						
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be rea										
	organization's mailing address? If "Yes," provide the names and addresses on Schedule O										
Sec	tion B. Policies (This Section B requests information about policies not required by the Internal Re	evenue	Code.)								
			,		Yes	No					
10a	Did the organization have local chapters, branches, or affiliates?			10a		Х					
b	If "Yes," did the organization have written policies and procedures governing the activities of such ch	napters	, affiliates,								
	and branches to ensure their operations are consistent with the organization's exempt purposes?			10b							
11a	la Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?										
b	<b>b</b> Describe on Schedule O the process, if any, used by the organization to review this Form 990.										
12a	2a Did the organization have a written conflict of interest policy? If "No," go to line 13										
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise	to con	flicts?	12b	Х						
С	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "	Yes," d	escribe								
	on Schedule O how this was done			12c	Х						
13	Did the organization have a written whistleblower policy?			13	Х						
14	Did the organization have a written document retention and destruction policy?			14	Х						
15	Did the process for determining compensation of the following persons include a review and approve	al by ind	dependent								
	$persons, comparability\ data,\ and\ contemporaneous\ substantiation\ of\ the\ deliberation\ and\ decision?$										
а	The organization's CEO, Executive Director, or top management official			15a	Х						
b	Other officers or key employees of the organization			15b		X					
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.										
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arranger	ment w	ith a								
	taxable entity during the year?			16a		X					
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate	•	•								
	in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organ										
0	exempt status with respect to such arrangements?			16b							
	tion C. Disclosure										
17	List the states with which a copy of this Form 990 is required to be filed CO		<b>-</b> /								
18	Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, a	nd 990	-1 (section 501(c)(3)	s only)	availal	ole					
	for public inspection. Indicate how you made these available. Check all that apply.										
	X Own website Another's website X Upon request Other (explain		•								
19	Describe on Schedule O whether (and if so, how) the organization made its governing documents, co	ontiict c	or interest policy, and	ı tınanı	ciai						
00	statements available to the public during the tax year.	oko sa	d roopeds								
20	State the name, address, and telephone number of the person who possesses the organization's bounded ${\tt THE}$ ORGANIZATION - $970-925-3721$	oks and	a records								

81611

620 W BLEEKER ST, ASPEN,

Form 990 (2022) ASPEN HISTORICAL SOCIETY 84-6037756 Page 7

#### Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

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

#### 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.
- 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** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation 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.

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

							sate	ted any current officer, director, or trustee.					
(A)	(B)	(C) Position						(D)	<b>(E)</b> Reportable	(F)			
Name and title	Average		not c	heck	more	than o		Reportable	Estimated				
	hours per	box	, unles cer an	ss pei id a d	rson i irecto	s both	n an tee)	compensation	compensation	amount of			
	week (list any						Ĺ	from the	from related organizations	other compensation			
	hours for	Individual trustee or director				L.		organization	(W-2/1099-MISC/	from the			
	related	96 OF	stee			sate		(W-2/1099-MISC/	1099-NEC)	organization			
	organizations	truste	Institutional trustee		yee	Highest compensated employee		1099-NEC)	, , , , , , , , , , , , , , , , , , , ,	and related			
	below	idual	ution	 	Key employee	est co	er	, ,		organizations			
	line)	Indiv	Instit	Officer	Key 6	High	Former						
(1) KELLY MURPHY	40.00								_	_			
EXECUTIVE DIRECTOR		Х						128,843.	0.	0.			
(2) ALLISON RATAJCZAK	0.25								_	_			
TRUSTEE		Х						0.	0.	0.			
(3) BRITTANIE ROCKHILL	0.25												
TRUSTEE		Х						0.	0.	0.			
(4) CHACE DILLON	0.25												
TRUSTEE		Х						0.	0.	0.			
(5) CHARLES CUNNIFFE	0.25								_	_			
VICE-PRESIDENT		Х		Х				0.	0.	0.			
(6) CHRIS PREUSCH	0.25	1								_			
TRUSTEE		Х						0.	0.	0.			
(7) CHRISTINE BENEDETTI	0.25												
TRUSTEE		Х						0.	0.	0.			
(8) DAVID HYMAN	0.25	ļ											
TRUSTEE	1 05	Х						0.	0.	0.			
(9) DAVID WALBERT	1.25	ļ											
TRUSTEE		Х						0.	0.	0.			
(10) JACKIE KASABACH	0.25			l									
SECRETARY		Х		Х				0.	0.	0.			
(11) JACQUELINE RUGER HUTTON	1.00								_	_			
CO-PRESIDENT		Х		Х				0.	0.	0.			
(12) KATE MCBRIDE	0.05												
TRUSTEE		Х						0.	0.	0.			
(13) MAUREEN POSCHMAN	0.25								_	_			
TRUSTEE		Х						0.	0.	0.			
(14) RICH BURKLEY	0.50	1								_			
TREASURER		Х		X				0.	0.	0.			
(15) RUTH OWENS HANRAHAN	1.00	<b> </b>		l						_			
CO-PRESIDENT	0.50	Х		Х				0.	0.	0.			
(16) STUART FOX	0.50									^			
TRUSTEE	0.05	Х						0.	0.	0.			
(17) SUSAN BERNARD	0.25	٦,								•			
TRUSTEE	L	X						0.	0.	0.			

232007 12-13-22 Form **990** (2022)

Publ	ic D	is	30		O	S		ıre Co <sub>l</sub>	рy				
Form 990 (2022) ASPEN HIS	STORICAL	S	oc	ΙE	ΤY			•	84-6	0377	756	Pá	age 8
Part VII   Section A. Officers, Directors, Trus							t C	ompensated Employee	s (continued)				Ü
<b>(A)</b> Name and title	(B) Average hours per week (list any hours for related organizations below line)	director odgo.	not ch unles	(C Posi neck r ss per	tion more to son is rector		ne an	(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensatio from relate organizatior (W-2/1099-MI: 1099-NEC	on d ns SC/	comports organic	(F) timate nount of other pensa om the anization relate anization	of tion e ion ed
(18) TONY VAGNEUR	1.00												
TRUSTEE		Х						0.		0.			0.
TRUSTEE	0.25	х						0.		0.			0.
1b Subtotal 128,843. 0.  c Total from continuation sheets to Part VII, Section A 0.  d Total (add lines 1b and 1c) 128,843. 0.  2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable											0. 0. 0.		
										_		Yes	No
<ul> <li>3 Did the organization list any former officer, line 1a? If "Yes," complete Schedule J for st</li> <li>4 For any individual listed on line 1a, is the su</li> </ul>	uch individual										3		Х
and related organizations greater than \$150	•		-					•	-	[	4		Х
5 Did any person listed on line 1a receive or a rendered to the organization? If "Yes," com											5		Х
Section B. Independent Contractors  1 Complete this table for your five highest contractors	mnonestad ind	anar	ndor	nt co	ntro	ctor	e th	nat received more than <sup>©</sup>	\$100 000 of com	nencati	on fro	m	
the organization. Report compensation for										pensati	OH ITC	ЛΠ	
(A) Name and business		NC						(B) Description of s		Co	(Comper	;) nsatior	า

Total number of independent contractors (including but not limited to those listed above) who received more than

\$100,000 of compensation from the organization

Form 990 (2022) ASPEN HISTORICAL SOCIETY
Part VIII | Statement of Revenue

84-6037756

Page 9

ı aı	LVII				a in this Dant VIII			
		Check if Schedule O contain	is a response o	or note to any iin	(A)	(B)	(C)	(D)
					Total revenue	Related or exempt		Revenuè éxcluded
						function revenue	business revenue	from tax under
			T. I					sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts		Federated campaigns						
Sra Jou		Membership dues						
is, (		Fundraising events						
를 를		Related organizations		044 400				
imi		Government grants (contribution		<u>041,193.</u>				
ţi S	f	All other contributions, gifts, grants,						
효		similar amounts not included above	1f	490,665.				
할	g	Noncash contributions included in lines 1a-	1f <b>1g</b> \$	17,706.				
<u>ဒိ မ</u>	h	Total. Add lines 1a-1f			1,531,858.			
				Business Code				
ė	2 a	ADMISSIONS & TOU	RS	713990	105,826.	105,826.		
Σœ	b	·						
Se	С							
am eve	d							
Program Service Revenue	е		_					
P	f	All other program service revenu	ie					
		Total. Add lines 2a-2f			105,826.			
	3	Investment income (including di						
		other similar amounts)			18,688.			18,688.
	4	Income from investment of tax-e						
	5	Royalties						
			(i) Real	(ii) Personal				
	6 a	Gross rents 6a						
		Less: rental expenses 6b						
	С	Rental income or (loss) 6c						
	d	Not reptal in a creat and (local)						
		` '	(i) Securities	(ii) Other				
			77,695.					
	h	Less: cost or other basis	,					
<u>o</u>			90.176.					
Revenue	c	and sales expenses 7b 2 Gain or (loss) 7c	12.481.					
ě	d	Net gain or (loss)	,		-12,481.			-12,481.
e.		Gross income from fundraising even						,
Ğ	O u	including \$						
		contributions reported on line 10						
		Part IV, line 18	·					
	h	Less: direct expenses						
	~	Net income or (loss) from fundra						
	9 a	Gross income from gaming active						
		Part IV, line 19	II.					
	h	Less: direct expenses						
		Net income or (loss) from gamin						
		Gross sales of inventory, less re						
	10 4	and allowances		32,844.				
	h	Less: cost of goods sold		16,595.				
		Net income or (loss) from sales of			16,249.	16,249.		
$\dashv$		The moone of hose hom sales (	or mivoritory	Business Code				
Sn	11 a							
neo Tue	ıı a							
Miscellaneous Revenue	C							
Sce		All other revenue						
Ξ		Total. Add lines 11a-11d		L				
	12	Total revenue. See instructions			1,660,140.	122.075	0.	6,207.
					<u>_</u> , , <b>-</b> •	,	,	-,,

orm 990 (2022) ASPEN HISTORICAL SOCIETY

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 (**D**)
Fundraising (C) Management and general expenses Do not include amounts reported on lines 6b. Program service expenses Total expenses 7b, 8b, 9b, and 10b of Part VIII. expenses Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 Grants and other assistance to domestic individuals. See Part IV, line 22 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 ....... Benefits paid to or for members ..... Compensation of current officers, directors, 128,843. 38,653. 57,979. 32,211. trustees, and key employees ..... Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Other salaries and wages 599,498. 496,633. 65,376. 37,489. Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) 91,391. 11,900. 124,352. 21,061. Other employee benefits 9 51,878. 38,127. 8,786. 10 Payroll taxes Fees for services (nonemployees): Management Legal 24,450. 24,450. Accounting Lobbying Professional fundraising services. See Part IV, line 17 Investment management fees ..... Other. (If line 11g amount exceeds 10% of line 25, 24,328. column (A), amount, list line 11g expenses on Sch O.) 74,880. 34,477. 16,075. 16,722. 16,522. 200. Advertising and promotion 12 26,963. 14,825. 8,911. Office expenses 13 42,764. 31,200. 7,287. Information technology 15 Royalties 129,590. 129,590. 16 Occupancy 17 Travel Payments of travel or entertainment expenses 18 for any federal, state, or local public officials Conferences, conventions, and meetings 19 6,429. 6,429. 20 Payments to affiliates 21 94,008. 94,008. Depreciation, depletion, and amortization 22 33,276. 29,948. 3,328. 23 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.) 66,969. 66,969. EXHIBITS & COLLECTIONS All other expenses 1,420,622. 1,088,772. 221,506. 110,344. Total functional expenses. Add lines 1 through 24e 25 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here if following SOP 98-2 (ASC 958-720)

Form **990** (2022)

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Form 990 (2022) ASPEN HISTORICAL SOCIETY
Part X | Balance Sheet

84-6037756 Page **11** 

Pai	rt X	Balance Sheet					
		Check if Schedule O contains a response or n	ote to any	line in this Part X			
					<b>(A)</b> Beginning of year		<b>(B)</b> End of year
	1	Cash - non-interest-bearing			147,215.	1	190,531.
	2	Savings and temporary cash investments			1,213,425.	2	1,460,616.
	3	Pledges and grants receivable, net				3	
	4	Accounts receivable, net				4	
	5	Loans and other receivables from any current					
		trustee, key employee, creator or founder, sub	ostantial co	ntributor, or 35%			
		controlled entity or family member of any of the	nese persor	ns		5	
	6	Loans and other receivables from other disqu	alified perso	ons (as defined			
		under section 4958(f)(1)), and persons describ	on 4958(c)(3)(B)		6		
Assets	7	Notes and loans receivable, net				7	
	8	Inventories for sale or use		6,390.	8	5,749. 9,661.	
	9	Prepaid expenses and deferred charges		7,355.	9	9,661.	
	10a	Land, buildings, and equipment: cost or other					
		basis. Complete Part VI of Schedule D	10a	3,482,496. 1,573,638.			
	b	Less: accumulated depreciation	10b	1,573,638.	2,003,069.	10c	1,908,858. 1,122,111.
	11	Investments - publicly traded securities		1,434,081.	11	1,122,111.	
	12	Investments - other securities. See Part IV, line		12			
	13	Investments - program-related. See Part IV, lin			13		
	14	Intangible assets			14	-1 -1	
	15	Other assets. See Part IV, line 11		<u> </u>	35,973.	15	51,969.
	16	Total assets. Add lines 1 through 15 (must ed			4,847,508.	16	4,749,495.
	17	Accounts payable and accrued expenses		33,723.	17	38,029.	
	18	Grants payable	2 (50	18	4 050		
	19	Deferred revenue		3,650.	19	4,850.	
	20	Tax-exempt bond liabilities				20	
	21	Escrow or custodial account liability. Complet				21	
es	22	Loans and other payables to any current or fo					
Liabilities		trustee, key employee, creator or founder, suk					
iaj		controlled entity or family member of any of the			100 010	22	102 707
_	23	Secured mortgages and notes payable to unre			190,810.	23	183,787.
	24	Unsecured notes and loans payable to unrelation	-			24	
	25	Other liabilities (including federal income tax,					
		parties, and other liabilities not included on lin	•	•		0.5	
	06	of Schedule D			228,183.	25	226,666.
	26	Total liabilities. Add lines 17 through 25			220,103.	26	220,000.
S		Organizations that follow FASB ASC 958, c and complete lines 27, 28, 32, and 33.	neck nere	A			
ű	27	Net assets without donor restrictions			4,160,632.	27	3,970,848.
ala	28	Net assets with donor restrictions			458,693.	28	551,981.
ē B	20	Organizations that do not follow FASB ASC			430,033.	20	331,301.
臣		and complete lines 29 through 33.	950, 61166	Kilele			
<u></u>	29	Capital stock or trust principal, or current fund	ile.			29	
ets	30	Paid-in or capital surplus, or land, building, or				30	
Ass	31	Retained earnings, endowment, accumulated				31	
Net Assets or Fund Balances	32	Total net assets or fund balances			4,619,325.	32	4,522,829.
Z	33	Total liabilities and net assets/fund balances			4,847,508.	33	4,749,495.
		rotal nabilities and net assets/fully balances			-,0-,,500.	55	-,, -, -, -, -, -, -, -, -, -, -, -, -,

Form **990** (2022)

ASPEN HISTORICAL SOCIETY 84-6037756 Page **12** Form 990 (2022) Part XI Reconciliation of Net Assets Check if Schedule O contains a response or note to any line in this Part XI 1,660,140. Total revenue (must equal Part VIII, column (A), line 12) 1,420,622. Total expenses (must equal Part IX, column (A), line 25) 2 2 239,518. Revenue less expenses. Subtract line 2 from line 1 3 4,619,325. Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) -306,422 5 5 Net unrealized gains (losses) on investments Donated services and use of facilities 6 6 -11,614.7 7 Investment expenses 8 -17,9788 Prior period adjustments Other changes in net assets or fund balances (explain on Schedule O) 9 9 Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, 10 4,522,829. Part XII Financial Statements and Reporting Check if Schedule O contains a response or note to any line in this Part XII Yes No X Accrual Accounting method used to prepare the Form 990: Cash Other If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O. Х 2a Were the organization's financial statements compiled or reviewed by an independent accountant? 2a 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: X Separate basis Consolidated basis Both consolidated and separate basis Х **b** Were the organization's financial statements audited by an independent accountant? 2b If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis,

Both consolidated and separate basis

Form 990 (2022)

Х

**2**c

consolidated basis, or both:

Separate basis

Consolidated basis

c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit,

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the

or audits, explain why on Schedule O and describe any steps taken to undergo such audits

If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.

If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit

review, or compilation of its financial statements and selection of an independent accountant?

Uniform Guidance, 2 C.F.R. Part 200, Subpart F?

#### **SCHEDULE A**

(Form 990)

Department of the Treasury Internal Revenue Service

Name of the organization

#### **Public Charity Status and Public Support**

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

Attach to Form 990 or Form 990-EZ.

ASPEN HISTORICAL SOCIETY

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

Employer identification number

84-6037756

Open to Public Inspection

Reason for Public Charity Status. (All organizations must complete this part.) See instructions. Part I The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.) 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). A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, 4 city, and state: An organization operated for the benefit of a college or university owned or operated by a governmental unit described in 5 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). X 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 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) 11 An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or

- An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- **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.**
- **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.**
- **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.**
- **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.

	Enter the number of supported t	organizations					
g	Provide the following information	n about the supporte	d organization(s).				
	(i) Name of supported	ne of supported (ii) EIN (iii			nization listed ng document?	(v) Amount of monetary	(vi) Amount of other
	organization		(described on lines 1-10 above (see instructions))	Yes	No	support (see instructions)	support (see instructions)
F - 4	-1						

(Form 990) 2022 ASPEN HISTORICAL SOCIETY 84-6037 Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) 84-6037756 Page 2 Schedule A (Form 990) 2022

(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.)

Sec	ction A. Public Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1	Gifts, grants, contributions, and						
	membership fees received. (Do not						
	include any "unusual grants.")	1232891.	1428883.	86,005.	1550529.	1514152.	5812460.
2	Tax revenues levied for the organ-						
	ization's benefit and either paid to						
	or expended on its behalf						
3	The value of services or facilities						
	furnished by a governmental unit to						
	the organization without charge						
4	Total. Add lines 1 through 3	1232891.	1428883.	86,005.	1550529.	1514152.	5812460.
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)						
	Public support. Subtract line 5 from line 4.						5812460.
	ction B. Total Support	T	· · · · · · · · · · · · · · · · · · ·		Т	1	
	ndar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7	Amounts from line 4	1232891.	1428883.	86,005.	1550529.	1514152.	5812460.
8	Gross income from interest,						
	dividends, payments received on						
	securities loans, rents, royalties,	4- 4	40.050		4.5.000	10.500	
	and income from similar sources	15,675.	18,863.	3,144.	16,980.	18,688.	73,350.
9	Net income from unrelated business						
	activities, whether or not the						
	business is regularly carried on						
10	Other income. Do not include gain						
	or loss from the sale of capital						
	assets (Explain in Part VI.)						5005010
11	<b>Total support.</b> Add lines 7 through 10						5885810.
12	Gross receipts from related activities,	,	,			12	338,516.
13	First 5 years. If the Form 990 is for the						
800	organization, check this box and stor	o here Dor	······································				·····
	etion C. Computation of Public			aluman (f\)		144	98.75 %
	11 1 1 1					14	22 12
15	Public support percentage from 2021					15	
Ioa	33 1/3% support test - 2022. If the caten have The organization qualifies						
h	stop here. The organization qualifies 33 1/3% support test - 2021. If the o						
L.							
170	and <b>stop here.</b> The organization qual <b>10%</b> -facts-and-circumstances test						
174	and if the organization meets the fact	ū					•
	meets the facts-and-circumstances te			-			
h	10% -facts-and-circumstances test	-		*	-		
,	more, and if the organization meets the	ū				•	1070 01
					-		
18							
18	organization meets the facts-and-circular <b>Private foundation.</b> If the organization	umstances test. Th	ne organization qua	lifies as a publicly	supported organiz	zation	

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Schedule A (Form 990) 2022 ASPEN HISTORICAL SOCIETY

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

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

Se	ction A. Public Support	, , , , , , , , , , , , , , , , , , , ,	,				
Cale	ndar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
	Gifts, grants, contributions, and membership fees received. (Do not						
	include any "unusual grants.")						
2	Gross receipts from admissions, merchandise sold or services per- formed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3	Gross receipts from activities that are not an unrelated trade or business under section 513						
4	Tax revenues levied for the organ-						
7	ization's benefit and either paid to or expended on its behalf						
5	The value of services or facilities furnished by a governmental unit to						
_	the organization without charge						
	<b>Total.</b> Add lines 1 through 5						
78	3 received from disqualified persons						
k	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						
	Add lines 7a and 7b						
<u>8</u>	Public support. (Subtract line 7c from line 6.)						
		(-) 0040	(1-) 0040	(-) 0000	(-1) 0004	(-) 0000	(0 T-1-1
	ndar year (or fiscal year beginning in)	(a) 2018	<b>(b)</b> 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
	Amounts from line 6  Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
k	Unrelated business taxable income						
	(less section 511 taxes) from businesses						
	acquired after June 30, 1975						
	Add lines 10a and 10b  Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13	Total support. (Add lines 9, 10c, 11, and 12.)						
14	First 5 years. If the Form 990 is for the	-			•		
0-	check this box and stop here						
	ction C. Computation of Publi					T T	
	Public support percentage for 2022 (I		•	.,,		15	<u>%</u>
	Public support percentage from 2021 ction D. Computation of Inves					16	<u>%</u>
	Investment income percentage for 20			ne 13 column (f)		17	0/6
	Investment income percentage from					18	<u>%</u> %
	a 33 1/3% support tests - 2022. If the						
	more than 33 1/3%, check this box ar						
k	33 1/3% support tests - 2021. If the						
						orted organization	

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

Schedule A (Form 990) 2022

ASPEN HISTORICAL SOCIETY

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#### Part IV Supporting Organizations

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

#### Section A. All Supporting Organizations

- 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.
- 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).
- **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.
- **b** Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in **Part VI** when and how the organization made the determination.
- c 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.
- **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.
- **b** 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.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? 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.
- 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).
- **b** Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 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).
- 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).
- 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.
- **b** Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes." provide detail in Part VI.
- c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 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.
- **b** 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.)

	Yes	No
1		
2		
3a		
3b		
3c		
<u>4a</u>		
4b		
4c		
5a		
5b		
5c		
6		
7		
8		
8		
9a		
9b		
9с		
10a		
10b		
ule A (For	m 990)	2022

Schedule A (Form 990) 2022 ASPEN HISTORICAL SOCIETY 84-6037756 Page 5

Par	t IV   Supporting Organizations (continued)			
			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
а	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?	11a		
b	A family member of a person described on line 11a above?	11b		
С	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.	11c		
Sect	tion B. Type I Supporting Organizations			
			Yes	No
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 <b>Part VI</b> 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.	1		
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.	2		
Sect	tion C. Type II Supporting Organizations			
			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors			
	or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control			
	or management of the supporting organization was vested in the same persons that controlled or managed			
	the supported organization(s).	1		
Sect	tion D. All Type III Supporting Organizations			
			Yes	No
	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?	1		
	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).	2		
	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			
Sect	supported organizations played in this regard. tion E. Type III Functionally Integrated Supporting Organizations			
	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instruction	<i>s</i> )		
· a	The organization satisfied the Activities Test. Complete line 2 below.	٥,.		
b	The organization is the parent of each of its supported organizations. Complete line 3 below.			
С	The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see	instruction	c)	
2	Activities Test. Answer lines 2a and 2b below.		Yes	No
а	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.	2a		
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.	2b		
3	Parent of Supported Organizations. Answer lines 3a and 3b below.			
	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.	3a		
	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.	3b		

Schedule A (Form 990) 2022 ASPEN HISTORICAL SOCIETY

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

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Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 ( explain in Part VI). See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E. (B) Current Year Section A - Adjusted Net Income (A) Prior Year (optional) 1 Net short-term capital gain 2 Recoveries of prior-year distributions 3 Other gross income (see instructions) 3 4 4 Add lines 1 through 3. 5 5 Depreciation and depletion Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or 6 maintenance of property held for production of income (see instructions) 7 Other expenses (see instructions) 8 Adjusted Net Income (subtract lines 5, 6, and 7 from line 4) 8 (B) Current Year Section B - Minimum Asset Amount (A) Prior Year (optional) Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year): a Average monthly value of securities 1a **b** Average monthly cash balances 1b c Fair market value of other non-exempt-use assets 1c d Total (add lines 1a, 1b, and 1c) 1d e Discount claimed for blockage or other factors (explain in detail in Part VI): Acquisition indebtedness applicable to non-exempt-use assets 2 3 3 Subtract line 2 from line 1d. Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions). 4 5 Net value of non-exempt-use assets (subtract line 4 from line 3) 5 6 6 Multiply line 5 by 0.035. 7 Recoveries of prior-year distributions 7 8 Minimum Asset Amount (add line 7 to line 6) Section C - Distributable Amount Current Year Adjusted net income for prior year (from Section A, line 8, column A) 1 Enter 0.85 of line 1. 2 3 Minimum asset amount for prior year (from Section B, line 8, column A) 3 Enter greater of line 2 or line 3. 4 5 5 Income tax imposed in prior year Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) 6

Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see

Schedule A (Form 990) 2022

instructions)

Schedule A (Form 990) 2022 ASPEN HISTORICAL SOCIETY 84-6037756 Page 7

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

Га	Type in Non-i unctionally integrated 303	aj(s) Supporting Orga	inzations (continu	<u>uea)                                    </u>	
Sect	ion D - Distributions				Current Year
_1_	Amounts paid to supported organizations to accomplish exer	mpt purposes		1	
2	Amounts paid to perform activity that directly furthers exemp	t purposes of supported			
	organizations, in excess of income from activity			2	
3	Administrative expenses paid to accomplish exempt purpose	es of supported organizations		3	
4	Amounts paid to acquire exempt-use assets			4	
5	Qualified set-aside amounts (prior IRS approval required - pro	ovide details in Part VI)		5	
6	Other distributions (describe in Part VI). See instructions.			6	
7	Total annual distributions. Add lines 1 through 6.			7	
8	Distributions to attentive supported organizations to which the	ne organization is responsive			
	(provide details in Part VI). See instructions.			8	
9	Distributable amount for 2022 from Section C, line 6			9	
10	Line 8 amount divided by line 9 amount			10	
	ion E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistribution	ns	(iii) Distributable
	(,		Pre-2022		Amount for 2022
1	Distributable amount for 2022 from Section C, line 6				
2	Underdistributions, if any, for years prior to 2022 (reason-				
	able cause required - explain in <b>Part VI</b> ). See instructions.				
3	Excess distributions carryover, if any, to 2022				
	From 2017				
	From 2018				
	From 2019				
	From 2020				
	From 2021				
	Total of lines 3a through 3e				
	Applied to underdistributions of prior years				
	Applied to 2022 distributable amount				
— <u>''</u>	Carryover from 2017 not applied (see instructions)				
<del>-</del>	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.				
4	Distributions for 2022 from Section D,				
7	line 7:				
	·				
	Applied to underdistributions of prior years				
	Applied to 2022 distributable amount				
	Remainder. Subtract lines 4a and 4b from line 4.				
5	Remaining underdistributions for years prior to 2022, if				
	any. Subtract lines 3g and 4a from line 2. For result greater				
	than zero, explain in <b>Part VI.</b> See instructions.				
6	Remaining underdistributions for 2022. Subtract lines 3h				
	and 4b from line 1. For result greater than zero, explain in				
	Part VI. See instructions.				
7	<b>Excess distributions carryover to 2023.</b> Add lines 3j and 4c.				
8	Breakdown of line 7:				
a	Excess from 2018				
b	Excess from 2019				
	Excess from 2020				
	Excess from 2021				
e	Excess from 2022				

Schedule A (Form 990) 2022

84-603<u>7756 Page 8</u> ASPEN HISTORICAL SOCIETY Schedule A (Form 990) 2022 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. Part VI (See instructions.)

232028 12-09-22 Schedule A (Form 990) 2022

#### **SCHEDULE D** (Form 990)

Department of the Treasury Internal Revenue Service

**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.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Inspection

Name of the organization

ASPEN HISTORICAL SOCIETY

**Employer identification number** 84-6037756

Pai			or Accou	nts. Complete if the	
	organization answered "Yes" on Form 990, Part IV, line		(b) F	ada and ather accounts	_
	<u></u> -	(a) Donor advised funds	(b) Ful	nds and other accounts	•
1	Total number at end of year				
2	Aggregate value of contributions to (during year)				
3	Aggregate value of grants from (during year)				
4	Aggregate value at end of year	witing that the accept hold in depart of in	and friends		
5	Did the organization inform all donors and donor advisors in w	_		Vaa	Na
_	are the organization's property, subject to the organization's e			Yes	No
6	Did the organization inform all grantees, donors, and donor ad for charitable purposes and not for the benefit of the donor or				
		, , , , ,	J	Voc	No
Pai		anization answered "Ves" on Form 990	Part IV line 7	Yes	No
1	Purpose(s) of conservation easements held by the organization		r art iv, iii c 7	•	
•	Preservation of land for public use (for example, recreati	<u> </u>	f a historically	/ important land area	
	Protection of natural habitat	· —	-	istoric structure	
	Preservation of open space		. a ooramou m		
2	Complete lines 2a through 2d if the organization held a qualifie	ed conservation contribution in the form	of a conserva	ation easement on the l	ast
_	day of the tax year.			Held at the End of the T	
а	Total number of conservation easements		2a		
b					
С	Number of conservation easements on a certified historic stru-				
d	Number of conservation easements included in (c) acquired af				
			2d		
3	Number of conservation easements modified, transferred, rele			during the tax	
	year		ū	· ·	
4	Number of states where property subject to conservation ease	ement is located			
5	Does the organization have a written policy regarding the period				
	violations, and enforcement of the conservation easements it	holds?		Yes	No
6	Staff and volunteer hours devoted to monitoring, inspecting, h				
7	Amount of expenses incurred in monitoring, inspecting, handle	ing of violations, and enforcing conserva	tion easemen	nts during the year	
8	Does each conservation easement reported on line 2(d) above	•			
					No
9	In Part XIII, describe how the organization reports conservation				
	balance sheet, and include, if applicable, the text of the footnote	ote to the organization's financial statem	ents that des	cribes the	
Do	organization's accounting for conservation easements.  t III   Organizations Maintaining Collections of	Art Historical Tracquires or O	har Cimila	or Apporto	
Pai	Complete if the organization answered "Yes" on Form s		iller Sillilla	II ASSELS.	
	If the organization elected, as permitted under FASB ASC 958		and balance o	boot works	
ıa	, .	'			
	of art, historical treasures, or other similar assets held for publ			public	
L	service, provide in Part XIII the text of the footnote to its finance.			t works of	
b	If the organization elected, as permitted under FASB ASC 958	•			
	art, historical treasures, or other similar assets held for public	exhibition, education, or research in turti	ierance or pu	iblic service,	
	provide the following amounts relating to these items:			Φ.	
	(i) Revenue included on Form 990, Part VIII, line 1				
0	(ii) Assets included in Form 990, Part X			\$	
2	If the organization received or held works of art, historical trea		ıı yaırı, provid	<del>C</del>	
_	the following amounts required to be reported under FASB AS	•		¢	
a	Revenue included on Form 990, Part VIII, line 1  Assets included in Form 990, Part X			φ	

84-6037756 Page 2 ASPEN HISTORICAL SOCIETY Schedule D (Form 990) 2022 Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued) 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): X Public exhibition Loan or exchange program X Scholarly research Other X Preservation for future generations Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII. During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets X No to be sold to raise funds rather than to be maintained as part of the organization's collection? 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: Amount 10 c Beginning balance 1d Additions during the year Distributions during the year 1e Ending balance 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII. Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10. (a) Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back 146,042 146,042 146,042 146,042 146,042. **1a** Beginning of year balance Contributions Net investment earnings, gains, and losses Grants or scholarships Other expenditures for facilities and programs Administrative expenses ..... 146,042. 146,042. 146,042. End of year balance Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: Board designated or quasi-endowment Permanent endowment 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 Yes No organization by: (i) Unrelated organizations (ii) Related organizations 3a(ii) **b** If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? Describe in Part XIII the intended uses of the organization's endowment funds. Land, Buildings, and Equipment. Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10. (b) Cost or other Description of property (a) Cost or other (c) Accumulated (d) Book value basis (other) depreciation basis (investment) 80,670. 80,670 1a Land 1,801,546 3,188,727. 1,387,181. Buildings Leasehold improvements ..... 95,811. 77,507. 18.304 d Equipment 8,338 117,288. 108,950. e Other 1,908,858.

Schedule D (Form 990) 2022

Total. Add lines 1a through 1e. (Column (d) must equal Form 990. Part X. column (B). line 10c.)

		arc copy	1 6027756 - 2
Schedule D (Form 990) 2022 ASPEN HISTO Part VIII Investments - Other Securities.	RICAL SOCIETY	84	1-6037756 Page <b>3</b>
Complete if the organization answered "Yes"	on Form 990 Part IV line	11b See Form 990 Part X line 12	
(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or en	d-of-vear market value
(1) Financial derivatives			
(2) Closely held equity interests			
(3) Other			
(A)			
(B)			
(C)			
(D)			
(E)			
(F)			
(G)			
(H)			
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	
(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or en	d-of-vear market value
(1)	(b) Book value	(b) Method of Valdation. Cool of Cit	a or your market value
(1)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)			
Part IX Other Assets.			
Complete if the organization answered "Yes"		11d. See Form 990, Part X, line 15.	/h) Dealership
···	Description		(b) Book value
(1)			
(2)			
(3)			
(5) (6)			
(7)			
(8)			
(9)			
Total. (Column (b) must equal Form 990, Part X, col. (B) line	e 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. (a) Description of liability			(b) Book value
(1) Federal income taxes			
(2)			
(3)			
(4)			
(5)			
(6)			
<u>(7)</u>			
(8)			
(9)			
Total. (Column (b) must equal Form 990. Part X. col. (B) line	e 25.)		1

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 ...

ASPEN HISTORICAL SOCIETY <u>Schedule D (Form</u> 990) 2022 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. Total revenue, gains, and other support per audited financial statements 1 Amounts included on line 1 but not on Form 990, Part VIII, line 12: Net unrealized gains (losses) on investments Donated services and use of facilities Recoveries of prior year grants 2c Other (Describe in Part XIII.) Add lines 2a through 2d 2e Subtract line 2e from line 1 Amounts included on Form 990, Part VIII, line 12, but not on line 1: Investment expenses not included on Form 990, Part VIII, line 7b Other (Describe in Part XIII.) c Add lines 4a and 4b Total revenue. Add lines 3 and 4c. (This must equal Form 990. Part I. line 12 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. Total expenses and losses per audited financial statements 1 Amounts included on line 1 but not on Form 990, Part IX, line 25: a Donated services and use of facilities 2a Prior year adjustments 2b 2c Other (Describe in Part XIII.) Add lines 2a through 2d 2e Subtract line 2e from line 1 3 Amounts included on Form 990, Part IX, line 25, but not on line 1: a Investment expenses not included on Form 990, Part VIII, line 7b Other (Describe in Part XIII.) c Add lines 4a and 4b Total expenses. Add lines 3 and 4c. (This must equal Form 990. Part I. line 18.) 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 SOCIETY DOES NOT CAPITALIZE DONATED HISTORICAL ITEMS OR RECOGNIZE THEM AS REVENUES OR GAINS. DONATIONS NEED NOT BE RECOGNIZED IF THEY ARE ADDED TO COLLECTIONS THAT ARE HELD FOR PUBLIC EXHIBITION, EDUCATION, OR RESEARCH IN FURTHERANCE OF PUBLIC SERVICE RATHER THAN FINANCIAL GAIN; ARE PROTECTED, KEPT UNENCUMBERED, CARED FOR, AND PRESERVED; AND ARE SUBJECT TO A POLICY THAT REQUIRES THE PROCEEDS FROM SALES OF COLLECTION ITEMS TO BE USED TO ACQUIRE OTHER ITEMS FOR COLLECTIONS. PART V, LINE 4:

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EARNINGS ON THE ENDOWMENT FUNDS PROVIDE INCOME TO COVER MUSEUM COSTS.

Schedule D (Form 990) 2022	ASPEN HISTORICAL SOCIETY	84-6037756 Page 5
Schedule D (Form 990) 2022 Part XIII   Supplemental Ir	nformation (continued)	
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**SCHEDULE 0** (Form 990)

Supplemental Information to Form 990 or 990-EZ

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

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

Inspection

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

ASPEN HISTORICAL SOCIETY

**Employer identification number** 84-6037756

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
THE ASPEN HISTORICAL SOCIETY ENRICHES THE COMMUNITY THROUGH PRESERVING
AND COMMUNICATING OF ITS REMARKABLE HISTORY. THE ASPEN HISTORICAL
SOCIETY ACTIVELY PRESERVES AND PASSIONATELY PRESENTS THE LOCAL HISTORY
IN AN INSPIRED AND PROVOCATIVE MANNER THAT WILL CONTINUE TO ANCHOR THE
COMMUNITY AND ITS EVOLVING CHARACTER. THE SOCIETY ENHANCES THE LIVES
OF THOSE WITH WHOM IT WORKS AND LIVES. THE SOCIETY OFFERS A COMPELLING
REASON TO LIVE IN AND TO VISIT ASPEN/SNOWMASS.
FORM 990, PART VI, SECTION B, LINE 11B:
THE 990 IS PROVIDED TO THE BOARD PRIOR TO FILING FOR THEIR REVIEW. BOARD
MEMBERS ARE GIVEN A SET PERIOD OF TIME TO REVIEW IT AND ASK QUESTIONS.
ONCE THE DEADLINE EXPIRES AND ANY APPLICABLE CHANGES ARE MADE, THE 990 IS
FILED.
FORM 990, PART VI, SECTION B, LINE 12C:
ANNUALLY BOARD TRUSTEE MEMBERS MUST COMPLETE A CONFLICT OF INTEREST
DISCLOSURE DOCUMENT AND PROVIDE IT TO MANAGEMENT. BOARD TRUSTEES MUST
IMMEDIATELY NOTIFY MANAGEMENT OF ANY CHANGES.
FORM 990, PART VI, SECTION B, LINE 15A:
THE BOARD, OR AN APPOINTED COMMITTEE, REVIEWS INFORMATION OBTAINED IN
RELATION TO COMPARABLE POSITIONS. IT REVIEWS THIS INFORMATION, THEN
DISCUSSES THE PRIOR YEAR WITH THE EXECUTIVE DIRECTOR. ANY CHANGES TO

COMPENSATION ARE DETERMINED BY THE BOARD.

ASPEN HISTORICAL SOCIETY  FORM 990, PART VI, SECTION C, LINE 19:  UPON REQUEST, THE SOCIETY PROVIDES ITS GOVERNING DOCUMENTS AND APPLICABLE  POLICIES TO THE PUBLIC.  FORM 990, PART XII, LINE 2C:  THE ORGANIZATION'S EXECUTIVE DIRECTOR AND APPROPRIATE STAFF REVIEW THE  AUDITED OR REVIEWED FINANCIAL STATEMENTS, MEET WITH THE TREASURER, AND  SUBMIT THEIR RECOMMENDATIONS TO THE BOARD. ONCE APPROVAL IS RECEIVED,  THE EXECUTIVE DIRECTOR AUTHORIZES THE RELEASE OF THE AUDITED OR  REVIEWED FINANCIAL STATEMENTS.
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