

Form **1023**

(Rev. July 1981)

Department of the Treasury
Internal Revenue Service

Application for Recognition of Exemption

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

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

OMB No. 1545-0056

Expires May 31, 1984

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

This application, when properly completed, constitutes the notice required under section 508(a) of the Internal Revenue Code so that an applicant may be treated as described in section 501(c)(3) of the Code, and the notice required under section 508(b) for an organization claiming not to be a private foundation within the meaning of section 509(a). (Read the instructions for each part carefully before making any entries.) The organization must have an organizing instrument (see Part II) before this application may be filed.

Part I—Identification

1 Full name of organization

St. Joseph's Villa Housing Corp.

3(a) Address (number and street)

8000 Washington Highway

3(b) City or town, State, and ZIP code

Richmond, Virginia 23227

5 Month the annual accounting period ends

December

6 Date incorporated or formed

June 9, 1982

Employer identification number
If none, attach Form SS-4

54-1204810

Check the box applying under section:
 501(e) 501(f)

Name and phone number of person to be contacted

Caliman (804) 266-2447

7 Activity codes

160 | 381 | 399

8(a) Has the organization filed Federal income tax returns?

Yes No

If "Yes," state the form number(s), year(s) filed, and Internal Revenue office where filed

8(b) Has the organization filed exempt organization information returns?

Yes No

If "Yes," state the form number(s), year(s) filed, and Internal Revenue office where filed

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

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

Corporation—Articles of incorporation, bylaws. Trust—Trust indenture. Other—Constitution or articles, bylaws.

Part III.—Activities and Operational Information

1 What are or will be the organization's sources of financial support? List in order of magnitude. If a part of the receipts is or will be derived from the earnings of patents, copyrights, or other assets (excluding stocks, bonds, etc.), identify the item as a separate source of receipts. Attach representative copies of solicitations for financial support.

rent from housing development for handicapped

2 Describe the organization's fund-raising program, both actual and planned, and explain to what extent it has been put into effect. (Include details of fund-raising activities such as selective mailings, formation of fund-raising committees, use of professional fund raisers, etc.)

None - proposed housing development to be self-sufficient

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AUG 23 1982

District Director of Internal Revenue

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

Arthur K. Calman
(Signature)

President
(Title or authority of signer)

6/24/82
(Date)

Part III.—Activities and Operational Information (Continued)

- 3 Give a narrative description of the activities presently carried on by the organization, and those that will be carried on. If the organization is not fully operational, explain what stage of development its activities have reached, what further steps remain for the organization to become fully operational, and when such further steps will take place. The narrative should specifically identify the services performed or to be performed by the organization. (Do not state the purposes of the organization in general terms or repeat the language of the organizational documents.) If the organization is a school, hospital, or medical research organization, include enough information in your description to clearly show that the organization meets the definition of that particular activity that is contained in the instructions for Part VII-A.

The applicant has been organized less than 15 days. The only current activities have involved organization of the corporation and preparation of an application for HUD mortgage loan on or before 6/30/82. The organization plans to file an application for a HUD loan to construct and operate residential housing, maximum of 30 units, primarily for physically handicapped adults. The housing units will be specifically designed for the needs of physically handicapped adults who can live in their own separate housing units, care for themselves, but do require specially designed accommodations for their needs. When, and if, HUD approves the loan, further steps would be undertaken for the actual construction, completion and occupancy of the units, all pursuant to HUD regulations. The application to HUD for a mortgage loan does not at this point of time require any specific building plans - not even a proposed location. Accordingly, the activities of the organization have been limited to issuance of the Articles of Incorporation and adoption of by-laws, and preparation of the application for a HUD loan, including the supporting documentation.

4 The membership of the organization's governing body is:

(a) Names, addresses, and duties of officers, directors, trustees, etc.	(b) Specialized knowledge, training, expertise, or particular qualifications
Charles R. Morrison - 4803 Pocahontas Avenue Richmond, VA. 23226 - Vice President Harry I. Schutte, Jr. - 2813 Williamswood Road Richmond, VA 23235 - Secretary-Treasurer Arthur R. Caliman - 5211 Hill Drive Richmond, VA 23228 - President	Insurance and business Sr. V.P. - Bank-Real Estate Social problems and solutions

Part III.—Activities and Operational Information (Continued)

- 4 (c) Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials? Yes No
If "Yes," name those persons and explain the basis of their selection or appointment.

- (d) Are any members of the organization's governing body "disqualified persons" with respect to the organization (other than by reason of being a member of the governing body) or do any of the members have either a business or family relationship with "disqualified persons?" (See specific instruction 4(d).) Yes No
If "Yes," explain.

- (e) Have any members of the organization's governing body assigned income or assets to the organization? Yes No
If "Yes," attach a copy of assignment(s) and a list of items assigned.

- (f) Is it anticipated that any current or future member of the organization's governing body will assign income or assets to the organization? Yes No
If "Yes," explain fully on an attached sheet.

- 5 Does the organization control or is it controlled by any other organization? Yes No
Is the organization the outgrowth of another organization, or does it have a special relationship to another organization by reason of interlocking directorates or other factors? Yes No
If either of these questions is answered "Yes," explain.

Saint Joseph's Villa, primarily a residential institution for children with behavioral, emotional and physical handicaps, is the sole member and sponsor of St. Joseph's Villa Housing Corp.

- 6 Is the organization financially accountable to any other organization? Yes No
If "Yes," explain and identify the other organization. Include details concerning accountability or attach copies of reports if any have been submitted.

St. Joseph's Villa has advanced \$15,000.00 for original organizational costs - but the subject corporation shall be financially independent once it begins operations

- 7 (a) What assets does the organization have that are used in the performance of its exempt function? (Do not include property producing investment income.) If any assets are not fully operational, explain their status, what additional steps remain to be completed, and when such final steps will be taken. Only current assets are \$15,000 advanced by sponsor to cover preliminary organizational expenses.

- (b) To what extent have you used, or do you plan to use contributions as an endowment fund, i.e., hold contributions to produce income for the support of your exempt activities? No such plans

- 8 (a) What benefits, services, or products will the organization provide that are related to its exempt function? Residential housing facilities for the physically handicapped, and if vacancies occur and not claimed by the handicapped, residential housing for the elderly pursuant to HUD regulations.

Part III.—Activities and Operational Information (Continued)

8 (b) Have the recipients been required or will they be required to pay for the organization's benefits, services, or products? Yes No

If "Yes," explain and show how the charges are determined.

Rents from housing units will be used for expenses of overall project

9 Does or will the organization limit its benefits, services, or products to specific classes of individuals? Yes No

If "Yes," explain how the recipients or beneficiaries are or will be selected.

Physically handicapped and possibly elderly persons over 62 if any vacancies occur and not required for physically handicapped

10 Is the organization a membership organization? Yes No

If "Yes," complete the following:

(a) Describe the organization's membership requirements and attach a schedule of membership fees and dues. Sole member - Saint Joseph's Villa, sponsor - an exempt organization

(b) Describe your present and proposed efforts to attract members, and attach a copy of any descriptive literature or promotional material used for this purpose.

No plans for additional members - membership limited to sole member

(c) Are benefits, services, or products limited to members? Yes No

If "No," explain.

The sole member, e.g., Saint Joseph's Villa, will not receive benefits, services or products

11 Does or will the organization engage in activities tending to influence legislation or intervene in any way in political campaigns? Yes No

If "Yes," explain. (Note: You may wish to file Form 5768, Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation.)

12 Does the organization have a pension plan for employees? Yes No

13 (a) Are you filing Form 1023 within 15 months from the end of the month in which you were created or formed as required by section 508(a) and the related Regulations? (See general instructions.) Yes No

(b) If you answer "No," to 13(a) and you claim that you fit an exception to the notice requirements under section 508(a), attach an explanation of your basis for the claimed exception.

(c) If you answer "No," to 13(a) and section 508(a) does apply to you, you may be eligible for relief under section 1.9100 of the Income Tax Regulations from the application of section 508(a). Do you wish to request relief? Yes No

(d) If you answer "Yes," to 13(c) attach a detailed statement that satisfies the requirements of Rev. Proc. 79-63. See certified copy of original organization 6/9/82

(e) If you answer "No," to both 13(a) and 13(c) and section 508(a) does apply to you, your exemption can be recognized only from the date this application is filed with your key District Director. Therefore, do you want us to consider your application as a request for recognition of exemption from the date the application is received, or not retroactively to the date you were formed? Yes No

Part IV.—Statement as to Private Foundation Status

1 Is the organization a private foundation? Yes No

2 If you answer "Yes" to question 1 and the organization claims to be a private operating foundation, check here and complete Part VIII.

3 If you answer "No," to question 1 indicate the type of ruling you are requesting regarding the organization's status under section 509 by checking the box(es) that apply below:

(a) Definitive ruling under section 509(a)(1), (2), (3), or (4) Complete Part VII.

(b) Advance ruling under section 170(b)(1)(A)(vi) or 509(a)(2)—see instructions.

(c) Extended advance ruling under section 170(b)(1)(A)(vi) or 509(a)(2)—see instructions.

(Note: If you want an extended advance ruling you must check the appropriate boxes for both 3(b) and 3(c).)

Statement of Support, Revenue, and Expenses for period ending June 30, 19 82.

Support and Revenue	1	Gross contributions, gifts, grants, and similar amounts received	1	15,000.00
	2	Gross dues and assessments of members	2	
	3	(a) Gross amounts derived from activities related to organization's exempt purpose	3	
		(b) Minus cost of sales		
	4	(a) Gross amounts from unrelated business activities	4	
		(b) Minus cost of sales		
	5	(a) Gross amount received from sale of assets, excluding inventory items (attach schedule)	5	
	(b) Minus cost or other basis and sales expenses of assets sold			
6	Investment income (see instructions)	6		
7	Total support and revenue	7	15,000.00	
Expenses	8	Fund raising expenses	8	
	9	Contributions, gifts, grants, and similar amounts paid (attach schedule)	9	
	10	Disbursements to or for benefit of members (attach schedule)	10	
	11	Compensation of officers, directors, and trustees (attach schedule)	11	
	12	Other salaries and wages	12	
	13	Interest	13	
	14	Rent	14	
	15	Depreciation and depletion	15	
	16	Other (attach schedule)	16	
	17	Total expenses	17	
	18	Excess of support and revenue over expenses (line 7 minus line 17)	18	

Balance Sheets		Enter dates	Beginning date	Ending date
			6/15/82	6/30/82
Assets				
19	Cash (a) Interest bearing accounts		15,000.00	
	(b) Other	19		
20	Accounts receivable, net	20		
21	Inventories	21		
22	Bonds and notes (attach schedule)	22		
23	Corporate stocks (attach schedule)	23		
24	Mortgage loans (attach schedule)	24		
25	Other investments (attach schedule)	25		
26	Depreciable and depletable assets (attach schedule)	26		
27	Land	27		
28	Other assets (attach schedule)	28		
29	Total assets	29	15,000.00	
Liabilities				
30	Accounts payable	30		
31	Contributions, gifts, grants, etc., payable	31		
32	Mortgages and notes payable (attach schedule)	32		
33	Other liabilities (attach schedules)	33		
34	Total liabilities	34		
Fund Balances or Net Worth				
35	Total fund balances or net worth	35	15,000.00	
36	Total liabilities and fund balances or net worth (line 34 plus line 35)	36		

Has there been any substantial change in any aspect of your financial activities since the period ending date shown above? Yes No
 If "Yes," attach a detailed explanation.

Part VI.—Required Schedules for Special Activities

	If "Yes," check here:	And, complete schedule—
1 Is the organization, or any part of it, a school?	N/A	A
2 Does the organization provide or administer any scholarship benefits, student aid, etc.?	"	B
3 Has the organization taken over, or will it take over, the facilities of a "for profit" institution?	"	C
4 Is the organization, or any part of it, a hospital or a medical research organization?	"	D
5 Is the organization, or any part of it, a home for the aged?	"	E
6 Is the organization, or any part of it, a litigating organization (public interest law firm or similar organization)?	"	F
7 Is the organization, or any part of it, formed to promote amateur sports competition?	"	G

Form 1023 (Rev. 7-81)

Part VII.—Non-Private Foundation Status (Definitive ruling only)

A.—Basis for Non-Private Foundation Status

The organization is not a private foundation because it qualifies as:

	Kind of organization	Within the meaning of	Complete
✓		Sections 509(a)(1) and 170(b)(1)(A)(i)	
1	a church	Sections 509(a)(1) and 170(b)(1)(A)(ii)	
2	a school	Sections 509(a)(1) and 170(b)(1)(A)(iii)	
3	a hospital	Sections 509(a)(1) and 170(b)(1)(A)(iii)	
4	a medical research organization operated in conjunction with a hospital	Section 509(a)(4)	
5	being organized and operated exclusively for testing for public safety	Sections 509(a)(1) and 170(b)(1)(A)(iv)	Part VII.—B
6	being operated for the benefit of a college or university which is owned or operated by a governmental unit	Sections 509(a)(1) and 170(b)(1)(A)(vi)	Part VII.—B
7	normally receiving a substantial part of its support from a governmental unit or from the general public	Section 509(a)(2)	Part VII.—B
8	normally receiving not more than one-third of its support from gross investment income and more than one-third of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions)	Section 509(a)(3)	Part VII.—C
9	being operated solely for the benefit of or in connection with one or more of the organizations described in 1 through 4, or 6, 7, and 8 above		

B.—Analysis of Financial Support

	(a) Most recent tax year	(Years next preceding most recent tax year)			(e) Total
		(b) 19	(c) 19	(d) 19	
1 Gifts, grants, and contributions received					
2 Membership fees received					
3 Gross receipts from admissions, sales of merchandise or services, or furnishing of facilities in any activity which is not an unrelated business within the meaning of section 513					
4 Gross investment income (see instructions for definition)					
5 Net income from organization's unrelated business activities not included on line 4					
6 Tax revenues levied for and either paid to or spent on behalf of the organization					
7 Value of services or facilities furnished by a governmental unit to the organization without charge (not including the value of services or facilities generally furnished the public without charge)					
8 Other income (not including gain or loss from sale of capital assets)—attach schedule					
9 Total of lines 1 through 8					
10 Line 9 minus line 3					
11 Enter 2% of line 10, column (e) only					

12 If the organization has received any unusual grants during any of the above tax years, attach a list for each year showing the name of the contributor, the date and amount of grant, and a brief description of the nature of such grant. Do not include such grants on line 1 above—(See instructions).