

Form **990**

**Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

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.
- Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**2016**  
Open to Public Inspection

**A For the 2016 calendar year, or tax year beginning and ending**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>MISSOURI HISTORICAL SOCIETY</b>		<b>D</b> Employer identification number <b>43-0654866</b>
	Doing business as		<b>E</b> Telephone number <b>314-454-3104</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	<b>P.O. BOX 11940</b>		<b>G</b> Gross receipts \$ <b>53,801,267.</b>
	City or town, state or province, country, and ZIP or foreign postal code <b>ST. LOUIS, MO 63112-0040</b>		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>F</b> Name and address of principal officer: <b>FRANCES LEVINE, PH.D.</b> <b>SAME AS C ABOVE</b>		<b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		If "No," attach a list. (see instructions)	
<b>J</b> Website: <b>WWW.MOHISTORY.ORG</b>		<b>H(c)</b> Group exemption number <b>▶</b>	
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other <b>▶</b>		<b>L</b> Year of formation: <b>1866</b>	<b>M</b> State of legal domicile: <b>MO</b>

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>THE MISSOURI HISTORICAL SOCIETY (MHS) IS A MISSOURI PRO FORMA DECREE, NOT-FOR-PROFIT CORPORATION</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>40</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>40</b>
	<b>5</b> Total number of individuals employed in calendar year 2016 (Part V, line 2a)	<b>5</b>	<b>314</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>131</b>
	<b>7 a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 34	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>14,270,916.</b>	<b>23,417,554.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>123,916.</b>	<b>264,517.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>1,811,055.</b>	<b>1,422,413.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>629,399.</b>	<b>517,155.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>16,835,286.</b>	<b>25,621,639.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>0.</b>	<b>0.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>6,314,865.</b>	<b>7,358,697.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) <b>▶ 632,166.</b>	<b>0.</b>	<b>0.</b>
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>9,708,041.</b>	<b>14,227,775.</b>
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>16,022,906.</b>	<b>21,586,472.</b>
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>812,380.</b>	<b>4,035,167.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>75,705,097.</b>	<b>82,786,340.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>1,627,944.</b>	<b>2,866,468.</b>
		<b>74,077,153.</b>	<b>79,919,872.</b>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer		Date
	<b>FRANCES LEVINE, PH.D., PRESIDENT</b> Type or print name and title		
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>JAMES R. RITTS</b>	Preparer's signature	Date
	Firm's name <b>▶ RUBINBROWN LLP</b>	Firm's EIN <b>▶ 43-0765316</b>	Check if self-employed <input type="checkbox"/> PTIN <b>P00362910</b>
Firm's address <b>▶ ONE NORTH BRENTWOOD SAINT LOUIS, MO 63105</b>		Phone no. (314) 290-3300	

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission: THE MISSOURI HISTORICAL SOCIETY (MHS) IS A MISSOURI PRO FORMA DECREE, NOT-FOR-PROFIT CORPORATION WHOSE PRIMARY FUNCTIONS ARE EDUCATIONAL AND COMMUNITY PROGRAMS; COLLECTIONS AND CONSERVATION; LIBRARY AND RESEARCH; SEE SCHEDULE O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 4,177,380. including grants of \$ ) (Revenue \$ 17,000. ) EXHIBITIONS AND RESEARCH: THE MUSEUM PRESENTS A NUMBER OF EXHIBITS EACH YEAR, BOTH PERMANENT AND TEMPORARY. THE TEMPORARY EXHIBITS ARE A COMBINATION OF TRAVELING EXHIBITS, AS WELL AS EXHIBITS DEVELOPED AND PRESENTED BY THE EXHIBITIONS AND RESEARCH STAFF. THE 2016 EXHIBIT SCHEDULE INCLUDED, SPIES, TRAITORS, SABOTEURS: FEAR AND FREEDOM IN AMERICA; WHERE DID YOU GO TO HIGH SCHOOL?; LITTLE BLACK DRESS: FROM MOURNING TO NIGHT; ROUTE 66: MAIN STREET THROUGH ST. LOUIS; CAPTURING THE CITY; TOYS OF THE '50S, '60S AND '70S. ATTENDANCE TO THE MUSEUM AND ITS EXHIBITS WAS 517,375 IN 2016. WEB-BASED OUTREACH REPRESENTS A CONTINUED OPPORTUNITY FOR MUSEUMS TO ENGAGE VISITORS ONLINE, PROVIDING ACCESS TO SELECTED SEE SCHEDULE O

4b (Code: ) (Expenses \$ 4,656,189. including grants of \$ ) (Revenue \$ 23,533. ) LIBRARY AND COLLECTIONS: THE MISSOURI HISTORICAL SOCIETY HOLDS THE PREMIER REGIONAL HISTORY COLLECTION DOCUMENTING ST. LOUIS, MISSOURI, THE MISSISSIPPI AND MISSOURI VALLEYS, THE LOUISIANA PURCHASE TERRITORY AND THE AMERICAN WEST. AN INTEGRATED AND MULTI-FORMAT COLLECTION, IT SERVES AN AUDIENCE OF DIVERSE LOCAL, NATIONAL AND INTERNATIONAL READERS AND RESEARCHERS. LIBRARY AND COLLECTIONS INCLUDES THE EXPENSES ASSOCIATED WITH STEWARDSHIP OF THE COLLECTION OVERALL. THIS INCLUDES SALARIES AND SUPPLIES USED IN CONSERVING, CATALOGING, PROCESSING, AND DIGITIZING THE COLLECTION. THESE COLLECTION MANAGEMENT EFFORTS SERVE TO MAKE THE SEE SCHEDULE O

4c (Code: ) (Expenses \$ 2,137,605. including grants of \$ ) (Revenue \$ 59,304. ) THE COMMUNITY EDUCATION AND EVENTS DIVISION (ENCOMPASSES 4 DEPARTMENTS) OFFERS PROGRAMS TO ENGAGE AND EDUCATE AUDIENCES OF ALL AGES AND ABILITIES. THE COMMUNITY COLLABORATIONS DEPARTMENT OFFERED 291 PUBLIC PROGRAMS ATTENDED BY 60,349 PEOPLE. ABOUT 100 DIFFERENT COMMUNITY ORGANIZATIONS HELPED DEVELOP AND IMPLEMENT THESE HISTORICAL BASED PROGRAMS THAT LOOK AT THE REGION'S PAST TO CREATE DIALOGS ABOUT ITS FUTURE. THE EDUCATION AND INTERPRETATION DEPARTMENT ENGAGED 44,842 STUDENTS WITH ITS INTER-DISCIPLINARY FOCUS AND HANDS-ON ACTIVITIES THAT HELPED CLASSES CONNECT TO TEMPORARY AND LONG-TERM EXHIBITIONS. THE DEPARTMENT'S YOUTH AND FAMILY PROGRAMS REACHED 29,113 PERSONS AND THE HISTORY CLUBHOUSE SAW 159,531 VISITORS. THE TEENS MAKE HISTORY SUMMER SEE SCHEDULE O

4d Other program services (Describe in Schedule O.) (Expenses \$ 7,055,773. including grants of \$ ) (Revenue \$ 704,001.)

4e Total program service expenses 18,026,947.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> .....	<b>X</b>	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? .....	<b>X</b>	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> .....		<b>X</b>
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> .....		<b>X</b>
<b>5</b> 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 Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i> .....		<b>X</b>
<b>6</b> 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? <i>If "Yes," complete Schedule D, Part I</i> .....		<b>X</b>
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> .....		<b>X</b>
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> .....	<b>X</b>	
<b>9</b> 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? <i>If "Yes," complete Schedule D, Part IV</i> .....		<b>X</b>
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> .....	<b>X</b>	
<b>11</b> 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.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> .....	<b>X</b>	
<b>b</b> Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i> .....		<b>X</b>
<b>c</b> Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i> .....		<b>X</b>
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i> .....		<b>X</b>
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> .....	<b>X</b>	
<b>f</b> 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)? <i>If "Yes," complete Schedule D, Part X</i> .....	<b>X</b>	
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> .....	<b>X</b>	
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> .....	<b>X</b>	
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> .....		<b>X</b>
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....		<b>X</b>
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i> .....		<b>X</b>
<b>15</b> 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? <i>If "Yes," complete Schedule F, Parts II and IV</i> .....		<b>X</b>
<b>16</b> 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? <i>If "Yes," complete Schedule F, Parts III and IV</i> .....		<b>X</b>
<b>17</b> 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? <i>If "Yes," complete Schedule G, Part I</i> .....		<b>X</b>
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> .....	<b>X</b>	
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> .....		<b>X</b>

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> .....		X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....		
<b>21</b> 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? <i>If "Yes," complete Schedule I, Parts I and II</i> .....		X
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....		X
<b>23</b> 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 "Yes," complete Schedule J</i> .....	X	
<b>24a</b> 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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>b</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? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i> .....		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....	X	
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....		X
<b>b</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)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O .....	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

Main form table with columns for question numbers (1a-14b), Yes/No checkboxes, and numerical input fields. Includes questions about Form 1096, Form W-2G, Form W-3, and various IRS forms like 8899, 8282, and 720.

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 in Schedule O. See instructions.

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

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a (40), 1b (40), 2 (X), 3 (X), 4 (X), 5 (X), 6 (X), 7a (X), 7b (X), 8a (X), 8b (X), 9 (X).

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

Table with 3 columns: Question, Yes, No. Rows include: 10a (X), 10b, 11a (X), 11b, 12a (X), 12b (X), 12c (X), 13 (X), 14 (X), 15a (X), 15b (X), 16a (X), 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed NONE
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. [X] Own website [ ] Another's website [X] Upon request [ ] Other (explain in Schedule O)
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records: BENJAMIN C. WASHINGTON, CPA - 314-746-4421 5700 LINDELL BLVD, ST. LOUIS, MO 63112

**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. 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 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 and/or Box 7 of Form 1099-MISC) 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.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) HARRY RICH CHAIRMAN	1.00	X		X				0.	0.	0.
(2) DAN COLE VICE CHAIRMAN	1.00	X		X				0.	0.	0.
(3) WILLIAM C. RUSNACK TREASURER	1.00	X		X				0.	0.	0.
(4) MARIE CASEY SECRETARY	1.00	X		X				0.	0.	0.
(5) MARVIN ANDERSON TRUSTEE	1.00	X						0.	0.	0.
(6) HOLLY BENSON TRUSTEE	1.00	X						0.	0.	0.
(7) CATHY BERGES TRUSTEE	1.00	X						0.	0.	0.
(8) KIMMY BRAUER TRUSTEE	1.00	X						0.	0.	0.
(9) CINDY BRINKLEY TRUSTEE	1.00	X						0.	0.	0.
(10) BERT CONDIE III TRUSTEE	1.00	X						0.	0.	0.
(11) WILLIAM A. COPPEL TRUSTEE	1.00	X						0.	0.	0.
(12) BOB COX TRUSTEE	1.00	X						0.	0.	0.
(13) KAT CUNNINGHAM TRUSTEE	1.00	X						0.	0.	0.
(14) GERALD EARLY, PH.D. TRUSTEE	1.00	X						0.	0.	0.
(15) KIM EBERLEIN TRUSTEE	1.00	X						0.	0.	0.
(16) HON. STEVE EHLMANN TRUSTEE	1.00	X						0.	0.	0.
(17) MARILYN R. FOX TRUSTEE	1.00	X						0.	0.	0.

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) CHERI FROMM TRUSTEE	1.00	X						0.	0.	0.
(19) BOB FULSTONE TRUSTEE	1.00	X						0.	0.	0.
(20) GARY GAERTNER, JR. TRUSTEE	1.00	X						0.	0.	0.
(21) SCOTT GALT TRUSTEE	1.00	X						0.	0.	0.
(22) HON. WAYNE GOODE TRUSTEE	1.00	X						0.	0.	0.
(23) MARY HEGER TRUSTEE	1.00	X						0.	0.	0.
(24) MARY LEE HERMANN TRUSTEE	1.00	X						0.	0.	0.
(25) PETER KASTOR TRUSTEE	1.00	X						0.	0.	0.
(26) KENNETH KRANZBERG TRUSTEE	1.00	X						0.	0.	0.
<b>1b Sub-total</b>								0.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b>								953,572.	0.	78,960.
<b>d Total (add lines 1b and 1c)</b>								953,572.	0.	78,960.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **6**

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person		X

**Section B. Independent Contractors**

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

(A) Name and business address	(B) Description of services	(C) Compensation
BSI CONSTRUCTORS INC 6767 SOUTHWEST AVENUE, ST. LOUIS, MO 63143	CONSTRUCTION/RENOVATION/PROFESSIONAL SERVICES	2,676,687.
MACKEY MITCHELL ARCHITECTS 900 SPRUCE ST #500, ST. LOUIS, MO 63102	PROFESSIONAL SERVICES	1,129,947.
UNITED CONSTRUCTION ENTERPRISES CO 12747 OLIVE BLVD., ST. LOUIS, MO 63141	ASSEMBLY AND REMOVAL OF EXHIBITS	215,423.
TPI, 10866 MIDWEST INDUSTRIAL BLVD., ST. LOUIS, MO 63132	ELECTRICAL LIGHTING INSTALLATION	188,794.
BUTLER'S PANTRY 1414 PARK AVENUE, ST. LOUIS, MO 63104	FOOD SERVICE	170,680.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **12**

SEE PART VII, SECTION A CONTINUATION SHEETS



**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) ANN LIBERMAN TRUSTEE	1.00	X						0.	0.	0.
(28) LISA MCLAUGHLIN TRUSTEE	1.00	X						0.	0.	0.
(29) SANDRA M. MOORE TRUSTEE	1.00	X						0.	0.	0.
(30) SANDY PETERS TRUSTEE	1.00	X						0.	0.	0.
(31) CHERYL POLK TRUSTEE	1.00	X						0.	0.	0.
(32) MABEL L. PURKERSON, M.D. TRUSTEE	1.00	X						0.	0.	0.
(33) GREG RHOMBERG TRUSTEE	1.00	X						0.	0.	0.
(34) REX SINQUEFIELD TRUSTEE	1.00	X						0.	0.	0.
(35) FRANK L. STEEVES TRUSTEE	1.00	X						0.	0.	0.
(36) ROMONDOUS STOVER TRUSTEE	1.00	X						0.	0.	0.
(37) FRED STRASHEIM TRUSTEE	1.00	X						0.	0.	0.
(38) JAMES TRICARICO, JR. TRUSTEE	1.00	X						0.	0.	0.
(39) LYNDSEY WATSON TRUSTEE	1.00	X						0.	0.	0.
(40) HON. MICHAEL WOLFF TRUSTEE	1.00	X						0.	0.	0.
(41) FRANCES LEVINE PRESIDENT	40.00			X				262,677.	0.	22,099.
(42) KAREN M. GOERING MANAGING DIRECTOR-OPERATIONS	40.00			X				167,745.	0.	16,779.
(43) BENJAMIN C WASHINGTON CFO	40.00			X				140,712.	0.	8,717.
(44) KATHERINE VAN ALLEN MANAGING DIRECTOR-MUSEUM SERVICES	40.00					X		134,689.	0.	9,052.
(45) YVETTE HARTSFIELD MANAGING DIRECTOR-DEVELOPMENT	40.00					X		135,868.	0.	7,872.
(46) MELANIE ADAMS MANAGING DIRECTOR-COMMUNITY EDUC.	40.00					X		111,881.	0.	14,441.
Total to Part VII, Section A, line 1c .....								953,572.		78,960.

**Part VIII Statement of Revenue**

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>	871,933.				
	<b>c</b> Fundraising events .....	<b>1c</b>	269,039.				
	<b>d</b> Related organizations .....	<b>1d</b>					
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	10,480,662.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above .....	<b>1f</b>	11,795,920.				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$ .....		17,639.				
	<b>h Total.</b> Add lines 1a-1f .....		23,417,554.				
	<b>Program Service Revenue</b>	<b>2 a</b> PUBLICATIONS .....	<b>Business Code</b> 611600	78,242.	78,242.		
<b>b</b> EDUCATION AND EVENTS .....		611600	59,304.	59,304.			
<b>c</b> LIBRARY AND COLLECTIONS .....		611600	23,533.	23,533.			
<b>d</b> EXHIBITIONS .....		611600	17,000.	17,000.			
<b>e</b> .....							
<b>f</b> All other program service revenue .....		611600	86,438.	86,438.			
<b>g Total.</b> Add lines 2a-2f .....			264,517.				
<b>Other Revenue</b>		<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....		1,888,396.			1,888,396.
	<b>4</b> Income from investment of tax-exempt bond proceeds .....						
	<b>5</b> Royalties .....						
	<b>6 a</b> Gross rents .....	(i) Real					
		(ii) Personal					
		<b>b</b> Less: rental expenses .....					
		<b>c</b> Rental income or (loss) .....					
	<b>d</b> Net rental income or (loss) .....						
	<b>7 a</b> Gross amount from sales of assets other than inventory .....	(i) Securities					
		(ii) Other					
		<b>b</b> Less: cost or other basis and sales expenses .....					
		<b>c</b> Gain or (loss) .....					
	<b>d</b> Net gain or (loss) .....			-465,983.		-465,983.	
	<b>8 a</b> Gross income from fundraising events (not including \$ 269,039. of contributions reported on line 1c). See Part IV, line 18 .....	<b>a</b>	24,295.				
		<b>b</b> Less: direct expenses .....	<b>b</b>	76,578.			
<b>c</b> Net income or (loss) from fundraising events .....						-52,283.	
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>a</b>						
	<b>b</b> Less: direct expenses .....	<b>b</b>					
	<b>c</b> Net income or (loss) from gaming activities .....						
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>a</b>	801,788.					
	<b>b</b> Less: cost of goods sold .....	<b>b</b>	377,561.				
	<b>c</b> Net income or (loss) from sales of inventory .....					424,227.	
<b>Miscellaneous Revenue</b>		<b>Business Code</b>					
<b>11 a</b> FACILITIES & CATERING .....		611600	115,094.	115,094.			
	<b>b</b> .....						
	<b>c</b> .....						
	<b>d</b> All other revenue .....	611600	30,117.			30,117.	
	<b>e Total.</b> Add lines 11a-11d .....			145,211.			
<b>12 Total revenue.</b> See instructions. ....			25,621,639.	803,838.	0.	1,400,247.	

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...				
2 Grants and other assistance to domestic individuals. See Part IV, line 22 .....				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 .....				
4 Benefits paid to or for members .....				
5 Compensation of current officers, directors, trustees, and key employees .....	618,729.	184,524.	434,205.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) .....				
7 Other salaries and wages .....	5,346,503.	4,181,243.	805,758.	359,502.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	235,795.	205,160.	18,427.	12,208.
9 Other employee benefits .....	738,208.	532,415.	165,403.	40,390.
10 Payroll taxes .....	419,462.	315,218.	79,755.	24,489.
11 Fees for services (non-employees):				
a Management .....	58,339.		27,026.	31,313.
b Legal .....	44,961.		44,961.	
c Accounting .....	113,396.		113,396.	
d Lobbying .....				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees .....	185,435.		185,435.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	4,933,657.	4,872,171.	61,486.	
12 Advertising and promotion .....	440,717.	440,717.		
13 Office expenses .....	555,857.	382,397.	165,123.	8,337.
14 Information technology .....	744,740.	670,535.	60,875.	13,330.
15 Royalties .....				
16 Occupancy .....	3,568,091.	3,254,955.	296,987.	16,149.
17 Travel .....	68,164.	48,708.	10,417.	9,039.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings .....	46,704.	9,677.	31,877.	5,150.
20 Interest .....				
21 Payments to affiliates .....				
22 Depreciation, depletion, and amortization .....	1,003,454.	832,684.	159,623.	11,147.
23 Insurance .....	461,636.	420,498.	35,064.	6,074.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <b>EXHIBITS</b> .....	1,151,961.	1,151,961.		
b <b>EDUCATION &amp; EVENTS</b> .....	296,386.	294,186.	2,200.	
c <b>PUBLICATIONS</b> .....	120,696.	79,992.	40,704.	
d <b>ANNUAL APPEAL &amp; CULTIVA</b> .....	94,511.			94,511.
e All other expenses .....	339,070.	149,906.	188,637.	527.
<b>25 Total functional expenses.</b> Add lines 1 through 24e	<b>21,586,472.</b>	<b>18,026,947.</b>	<b>2,927,359.</b>	<b>632,166.</b>
<b>26 Joint costs.</b> 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)

**Part X Balance Sheet**

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

		(A)		(B)
		Beginning of year		End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	3,100,354.	<b>1</b>	7,338,688.
	<b>2</b> Savings and temporary cash investments .....	83,452.	<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....	3,201,157.	<b>3</b>	2,089,246.
	<b>4</b> Accounts receivable, net .....	84,168.	<b>4</b>	104,847.
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....	172,418.	<b>8</b>	170,970.
	<b>9</b> Prepaid expenses and deferred charges .....	492,116.	<b>9</b>	354,469.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 47,061,729.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 22,142,640.	25,119,575.	<b>10c</b> 24,919,089.
	<b>11</b> Investments - publicly traded securities .....	41,359,460.	<b>11</b>	45,468,835.
	<b>12</b> Investments - other securities. See Part IV, line 11 .....	2,086,656.	<b>12</b>	2,262,798.
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	5,741.	<b>15</b>	77,398.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) .....	75,705,097.	<b>16</b>	82,786,340.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	878,632.	<b>17</b>	2,194,955.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....	162,570.	<b>19</b>	81,314.
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....	586,742.	<b>25</b>	590,199.
	<b>26 Total liabilities.</b> Add lines 17 through 25 .....	1,627,944.	<b>26</b>	2,866,468.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets .....	47,407,775.	<b>27</b>	48,889,955.
	<b>28</b> Temporarily restricted net assets .....	13,984,294.	<b>28</b>	17,331,727.
	<b>29</b> Permanently restricted net assets .....	12,685,084.	<b>29</b>	13,698,190.
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds .....		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>32</b>	
<b>33</b> Total net assets or fund balances .....	74,077,153.	<b>33</b>	79,919,872.	
<b>34</b> Total liabilities and net assets/fund balances .....	75,705,097.	<b>34</b>	82,786,340.	

**Part XI Reconciliation of Net Assets**

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	25,621,639.
2	Total expenses (must equal Part IX, column (A), line 25)	2	21,586,472.
3	Revenue less expenses. Subtract line 2 from line 1	3	4,035,167.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	74,077,153.
5	Net unrealized gains (losses) on investments	5	1,841,663.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-34,111.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	79,919,872.

**Part XII Financial Statements and Reporting**

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

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
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:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2b	Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input checked="" type="checkbox"/> Both consolidated and separate basis			
2c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
3b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2016

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Name of the organization: MISSOURI HISTORICAL SOCIETY
Employer identification number: 43-0654866

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 [ ] A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
2 [ ] A school described in section 170(b)(1)(A)(ii).
3 [ ] A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).
4 [ ] A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii).
5 [ ] An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv).
6 [ ] A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
7 [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).
8 [ ] A community trust described in section 170(b)(1)(A)(vi).
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.
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.
11 [ ] An organization organized and operated exclusively to test for public safety.
12 [ ] An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
a [ ] Type I. A supporting organization operated, supervised, or controlled by its supported organization(s).
b [ ] Type II. A supporting organization supervised or controlled in connection with its supported organization(s).
c [ ] Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s).
d [ ] Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated.
e [ ] Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations: [ ]
g Provide the following information about the supported organization(s).

Table with 6 columns: (i) Name of supported organization, (ii) EIN, (iii) Type of organization, (iv) Is the organization listed in your governing document?, (v) Amount of monetary support, (vi) Amount of other support. Includes a Total row at the bottom.

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	18137667.	12921377.	14590400.	14270916.	23441849.	83362209.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	18137667.	12921377.	14590400.	14270916.	23441849.	83362209.
<b>5</b> 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) .....						9692412.
<b>6 Public support.</b> Subtract line 5 from line 4.						73669797.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
<b>7</b> Amounts from line 4 .....	18137667.	12921377.	14590400.	14270916.	23441849.	83362209.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....	895,762.	1062396.	1503180.	1792576.	1888396.	7142310.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....	985,352.	845,583.	640,622.	629,399.	946,999.	4047955.
<b>11 Total support.</b> Add lines 7 through 10						94552474.
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	1,385,412.
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

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

<b>14</b> Public support percentage for 2016 (line 6, column (f) divided by line 11, column (f)) .....	<b>14</b>	77.91 %
<b>15</b> Public support percentage from 2015 Schedule A, Part II, line 14 .....	<b>15</b>	84.50 %
<b>16a 33 1/3% support test - 2016.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2015.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2016.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2015.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		<input type="checkbox"/>

**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.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> 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 .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ..... ►

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

<b>15</b> Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2015 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2016 (line 10c, column (f) divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2015 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2016.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ..... ►

**b 33 1/3% support tests - 2015.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ..... ►

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



**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>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.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
<b>b</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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
<b>c</b> 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)? <i>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.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) 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).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> 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? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (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? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>9a</b> 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))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> 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)? <i>If "Yes," answer 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
<b>b</b> A family member of a person described in (a) above?		
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? <i>If "Yes" to a, b, or c, provide detail in Part VI.</i>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
<b>2</b> 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? <i>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.</i>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> 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)? <i>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).</i>		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> 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?		
<b>2</b> 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? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
<b>3</b> By reason of the relationship described in (2), 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? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
<b>2</b> Activities Test. Answer (a) and (b) below.		
<b>a</b> 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? <i>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.</i>		
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>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.</i>		
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.		
<b>a</b> 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? <i>Provide details in Part VI.</i>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		

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

1  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>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1	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	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% 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	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

<b>Section C - Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

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

<b>Section D - Distributions</b>	<b>Current Year</b>
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	
<b>4</b> Amounts paid to acquire exempt-use assets	
<b>5</b> Qualified set-aside amounts (prior IRS approval required)	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions	
<b>7 Total annual distributions.</b> Add lines 1 through 6	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions	
<b>9</b> Distributable amount for 2016 from Section C, line 6	
<b>10</b> Line 8 amount divided by Line 9 amount	

<b>Section E - Distribution Allocations (see instructions)</b>	<b>(i) Excess Distributions</b>	<b>(ii) Underdistributions Pre-2016</b>	<b>(iii) Distributable Amount for 2016</b>
<b>1</b> Distributable amount for 2016 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2016 (reasonable cause required- explain in Part VI). See instructions			
<b>3</b> Excess distributions carryover, if any, to 2016:			
<b>a</b>			
<b>b</b>			
<b>c</b> From 2013			
<b>d</b> From 2014			
<b>e</b> From 2015			
<b>f Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2016 distributable amount			
<b>i</b> Carryover from 2011 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
<b>4</b> Distributions for 2016 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2016 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4			
<b>5</b> Remaining underdistributions for years prior to 2016, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions			
<b>6</b> Remaining underdistributions for 2016. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions			
<b>7 Excess distributions carryover to 2017.</b> Add lines 3j and 4c			
<b>8</b> Breakdown of line 7:			
<b>a</b>			
<b>b</b> Excess from 2013			
<b>c</b> Excess from 2014			
<b>d</b> Excess from 2015			
<b>e</b> Excess from 2016			

Schedule A (Form 990 or 990-EZ) 2016

**Part VI**

**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
(See instructions.)

**SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:**

**MUSEUM SHOP**

2012 AMOUNT: \$ 164,416.

2013 AMOUNT: \$ 148,063.

2014 AMOUNT: \$ 237,057.

2015 AMOUNT: \$ 245,070.

2016 AMOUNT: \$ 801,788.

**OTHER REVENUE**

2012 AMOUNT: \$ 820,936.

2013 AMOUNT: \$ 697,520.

2014 AMOUNT: \$ 403,565.

2015 AMOUNT: \$ 384,329.

2016 AMOUNT: \$ 145,211.

**Schedule B**

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

Name of the organization

MISSOURI HISTORICAL SOCIETY

Employer identification number

43-0654866

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( 3 ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

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

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

**General Rule**

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

**Special Rules**

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

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

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

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization <b>MISSOURI HISTORICAL SOCIETY</b>	Employer identification number <b>43-0654866</b>
--	---

**Part I Contributors** (See instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	_____ _____ _____	\$ <u>583,914.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	_____ _____ _____	\$ <u>283,986.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	_____ _____ _____	\$ <u>500,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	_____ _____ _____	\$ <u>8,474,510.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	_____ _____ _____	\$ <u>10,480,662.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
_____	_____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization  <b>MISSOURI HISTORICAL SOCIETY</b>	Employer identification number  <b>43-0654866</b>
--	---

**Part II Noncash Property** (See instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____



Name of organization  <b>MISSOURI HISTORICAL SOCIETY</b>	Employer identification number  <b>43-0654866</b>
--	---

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

SCHEDULE D (Form 990)

Supplemental Financial Statements

OMB No. 1545-0047

2016 Open to Public Inspection

Department of the Treasury Internal Revenue Service

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.

Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

Name of the organization MISSOURI HISTORICAL SOCIETY Employer identification number 43-0654866

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include: 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, 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? (Yes/No), 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? (Yes/No)

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

Table with 2 columns: Held at the End of the Tax Year. Rows include: 1 Purpose(s) of conservation easements held by the organization (check all that apply): Preservation of land for public use, Protection of natural habitat, Preservation of open space, Preservation of a historically important land area, Preservation of a certified historic structure; 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year: a Total number of conservation easements, b Total acreage restricted by conservation easements, c Number of conservation easements on a certified historic structure included in (a), d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register; 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year; 4 Number of states where property subject to conservation easement is located; 5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? (Yes/No); 6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year; 7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year; 8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? (Yes/No); 9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 2 columns: Revenue, Assets. Rows include: 1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.; 1b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items: (i) Revenue included on Form 990, Part VIII, line 1; (ii) Assets included in Form 990, Part X; 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items: a Revenue included on Form 990, Part VIII, line 1; b Assets included in Form 990, Part X

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2016

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a  Public exhibition
- b  Scholarly research
- c  Preservation for future generations
- d  Loan or exchange programs
- e  Other \_\_\_\_\_

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

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

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

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

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
1c	
1d	
1e	
1f	

- c Beginning balance
- d Additions during the year
- e Distributions during the year
- f 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

**Part V 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
1a Beginning of year balance	29,790,404.	29,930,358.	30,276,646.	27,427,530.	21,344,585.
b Contributions	9,095,750.	785,012.	153,739.	333,398.	4,744,990.
c Net investment earnings, gains, and losses	2,411,345.	291,734.	1,827,165.	3,079,718.	1,770,955.
d Grants or scholarships					
e Other expenditures for facilities and programs	1,255,216.	1,216,700.	2,327,192.	564,000.	433,000.
f Administrative expenses					
g End of year balance	40,042,283.	29,790,404.	29,930,358.	30,276,646.	27,427,530.

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

- a Board designated or quasi-endowment  44.14 %
- b Permanent endowment  30.55 %
- c Temporarily restricted endowment  25.31 %

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

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

- (i) unrelated organizations
- (ii) related organizations

	Yes	No
3a(i)		<input checked="" type="checkbox"/>
3a(ii)		<input checked="" type="checkbox"/>
3b		

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		661,510.		661,510.
b Buildings				
c Leasehold improvements		41,763,087.	19,367,855.	22,395,232.
d Equipment		4,564,235.	2,774,785.	1,789,450.
e Other		72,897.		72,897.

**Total.** Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)  24,919,089.

**Part VII Investments - Other Securities.**

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

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely-held equity interests .....		
(3) Other .....		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (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 end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

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

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

**Part X Other Liabilities.**

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) DEFERRED COMPENSATION PLAN	381,421.
(3) SPLIT-INTEREST AGREEMENTS	208,778.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	590,199.

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 FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**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.

<b>1</b>	Total revenue, gains, and other support per audited financial statements	<b>1</b>	27,056,640.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
<b>a</b>	Net unrealized gains (losses) on investments	<b>2a</b>	1,841,663.
<b>b</b>	Donated services and use of facilities	<b>2b</b>	9,996.
<b>c</b>	Recoveries of prior year grants	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	1,851,659.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	25,204,981.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	185,435.
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	231,223.
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	416,658.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)	<b>5</b>	25,621,639.

**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.

<b>1</b>	Total expenses and losses per audited financial statements	<b>1</b>	21,213,921.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
<b>a</b>	Donated services and use of facilities	<b>2a</b>	9,996.
<b>b</b>	Prior year adjustments	<b>2b</b>	
<b>c</b>	Other losses	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	110,689.
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	120,685.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	21,093,236.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	185,435.
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	307,801.
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	493,236.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)	<b>5</b>	21,586,472.

**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 X, LINE 2:**

THE MUSEUM QUALIFIES AS A TAX-EXEMPT ORGANIZATION UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND THEREFORE, THERE IS NO PROVISION FOR THE INCOME TAXES.

THE MUSEUM FOLLOWS THE PROVISIONS OF ASC 740-10-25 REQUIRING DISCLOSURE OF UNCERTAIN TAX POSITIONS. THERE HAS BEEN NO INTEREST OR PENALTIES RECOGNIZED IN THE STATEMENTS OF ACTIVITIES NOR IN THE STATEMENTS OF FINANCIAL POSITION RELATED TO UNCERTAIN TAX POSITIONS. IN ADDITION, NO TAX POSITIONS EXIST FOR WHICH IT IS REASONABLY POSSIBLE THAT THE TOTAL AMOUNTS OF UNRECOGNIZED TAX BENEFITS WILL SIGNIFICANTLY INCREASE OR DECREASE WITHIN THE NEXT 12 MONTHS. THE MUSEUM EVALUATES ITS UNCERTAIN TAX

**Part XIII** Supplemental Information (continued)

POSITIONS, IF ANY, ON A CONTINUAL BASIS THROUGH REVIEW OF ITS POLICIES AND PROCEDURES, REVIEW OF ITS REGULAR TAX FILINGS, AND DISCUSSIONS WITH OUTSIDE EXPERTS.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

MUSEUM SHOP EXPENSES	260,365.
RESTAURANT EXPENSES	47,436.
SPECIAL EVENT EXPENSES	-76,578.
TOTAL TO SCHEDULE D, PART XI, LINE 4B	231,223.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

SPLIT INTEREST CHANGE IN VALUE	34,111.
SPECIAL EVENT EXPENSES	76,578.
TOTAL TO SCHEDULE D, PART XII, LINE 2D	110,689.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

MUSEUM SHOP EXPENSES	260,365.
RESTAURANT EXPENSES	47,436.
TOTAL TO SCHEDULE D, PART XII, LINE 4B	307,801.

PART III, LINE 1(A)

THE MISSOURI HISTORICAL SOCIETY'S RESEARCH COLLECTIONS CONTAIN UNIQUE REGIONAL HISTORY SOURCES AND OBJECTS DOCUMENTING ST. LOUIS, MISSOURI, THE MISSISSIPPI AND MISSOURI VALLEYS, THE LOUISIANA PURCHASE TERRITORY AND THE AMERICAN WEST. AN INTEGRATED AND MULTI-FORMAT COLLECTION, IT SERVES AN AUDIENCE OF DIVERSE LOCAL, NATIONAL AND INTERNATIONAL READERS AND RESEARCHERS. MUSEUM STAFF MEMBERS WORK TO SHARE THE COLLECTIONS IN THE GALLERIES, THROUGH OUR VARIOUS PUBLICATIONS, ONLINE AND THROUGH OUR

**Part XIII** Supplemental Information (continued)

COMMUNITY AND EDUCATIONAL PROGRAMS. THE VALUE OF THE COLLECTIONS AND LIBRARY HOLDINGS CANNOT BE DETERMINED, AND THEREFORE, IS NOT CAPITALIZED IN THE ACCOMPANYING FINANCIAL STATEMENTS. EACH OF THE ITEMS IN THE COLLECTIONS IS CATALOGUED, PRESERVED AND CARED FOR, AND COLLECTIONS AUDITS ARE PERFORMED REGULARLY. PROCEEDS FROM DEACCESSIONS ARE USED TO ACQUIRE OTHER OBJECTS FOR THE COLLECTIONS.

PART III, LINE 4

SEE STATEMENT FOR LINE 1(A) FOR A DEFINITION OF THE ARTIFACTS IN THE COLLECTION. THE COLLECTION AND THE EXHIBITS, DISCUSSIONS AND RESEARCH OF THESE ITEMS IN THE COLLECTION PROVIDE A REVIEW OF THE PAST AND THE CHOICES MADE IN THE PAST AS A BASIS OF DISCUSSING CURRENT ACTIVITIES AND OPTIONS AND THEIR POSSIBLE IMPACT ON THE FUTURE. THEY CAN PROVIDE THE BASIS FOR ADDRESSING AND SOLVING COMMON PROBLEMS.

PART V, LINE 4

THE MUSEUM USES A SPENDING POLICY OF BETWEEN 3.0 AND 5% OF A TRAILING 13 QUARTER AVERAGE OF THE VALUE OF THE ENDOWMENT TO DETERMINE ANNUAL SPENDING. A PORTION OF THIS SUPPORTS UNRESTRICTED SPENDING COVERING OPERATING EXPENSES. A PORTION IS DESIGNATED FOR TEMPORARILY RESTRICTED SPENDING (I.E. PUBLICATIONS, GALLERIES, EXHIBIT MAINTENANCE) BASED ON DONOR'S INSTRUCTIONS.

**SCHEDULE G**  
**(Form 990 or 990-EZ)**

**Supplemental Information Regarding Fundraising or Gaming Activities**

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

**2016**

Open to Public Inspection

▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule G (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Department of the Treasury  
Internal Revenue Service

Name of the organization

**MISSOURI HISTORICAL SOCIETY**

Employer identification number

**43-0654866**

**Part I**

**Fundraising Activities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a  Mail solicitations   e  Solicitation of non-government grants  
 b  Internet and email solicitations                               f  Solicitation of government grants  
 c  Phone solicitations   g  Special fundraising events  
 d  In-person solicitations

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

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

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			

Total .....

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

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



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

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))	
		DINNER (event type)	LITTLE BLACK DRESS (event type)	1 (total number)		
Revenue	1	Gross receipts	69,310.	212,605.	11,419.	293,334.
	2	Less: Contributions	57,750.	204,870.	6,419.	269,039.
	3	Gross income (line 1 minus line 2)	11,560.	7,735.	5,000.	24,295.
Direct Expenses	4	Cash prizes				
	5	Noncash prizes				
	6	Rent/facility costs				
	7	Food and beverages	12,341.	13,991.		26,332.
	8	Entertainment	1,785.	450.	350.	2,585.
	9	Other direct expenses	18,403.	27,947.	1,311.	47,661.
	10	Direct expense summary. Add lines 4 through 9 in column (d)				76,578.
11	Net income summary. Subtract line 10 from line 3, column (d)				-52,283.	

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

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1	Gross revenue			
Direct Expenses	2	Cash prizes			
	3	Noncash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
	6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No
	7	Direct expense summary. Add lines 2 through 5 in column (d)			
	8	Net gaming income summary. Subtract line 7 from line 1, column (d)			

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

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

b If "No," explain: \_\_\_\_\_

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

b If "Yes," explain: \_\_\_\_\_

- 11** Does the organization conduct gaming activities with nonmembers?  Yes  No
- 12** Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?  Yes  No

- 13** Indicate the percentage of gaming activity conducted in:
 

<b>a</b> The organization's facility	<b>13a</b>	%
<b>b</b> An outside facility	<b>13b</b>	%

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

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue?  Yes  No
- b** If "Yes," enter the amount of gaming revenue received by the organization ► \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ► \$ \_\_\_\_\_
- c** If "Yes," enter name and address of the third party:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

**16** Gaming manager information:

Name ► \_\_\_\_\_

Gaming manager compensation ► \$ \_\_\_\_\_

Description of services provided ► \_\_\_\_\_

\_\_\_\_\_

Director/officer       Employee       Independent contractor

- 17** Mandatory distributions:
  - a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?  Yes  No
  - b** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Part IV** Supplemental Information (continued)

Multiple horizontal lines for supplemental information input.

**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

**2016**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

▶ Attach to Form 990.

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

▶ Information about Schedule J (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

Name of the organization

MISSOURI HISTORICAL SOCIETY

Employer identification number

43-0654866

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |   |
|--|---|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use    |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence    |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees      |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as, maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain .....

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? .....

**3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                                |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? .....
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan? .....
- c** Participate in, or receive payment from, an equity-based compensation arrangement? .....
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III .....

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III .....

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

	Yes	No
1a		
1b		
2		
3		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2016

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) FRANCES LEVINE PRESIDENT	(i)	262,677.	0.	0.	15,204.	6,895.	284,776.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) KAREN M. GOERING MANAGING DIRECTOR-OPERATIONS	(i)	167,745.	0.	0.	10,251.	6,528.	184,524.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

**Part III** Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

DISCLOSURE RELATED TO 2013 AND 2014 FORMS 990

AFTER FILING THE FORMS 990 FOR THE YEARS ENDED DECEMBER 31, 2013 AND 2014 THE MISSOURI HISTORICAL SOCIETY DISCOVERED THAT CERTAIN INFORMATION RELATED TO THE COMPENSATION OF THE PRESIDENT AND THE MANAGING DIRECTOR OF ADMINISTRATION AND OPERATIONS WAS NOT REPORTED PROPERLY. RELATED TO THE 2013 FORM 990, THE COMPENSATION OF THE MANAGING DIRECTOR OF ADMINISTRATION AND OPERATIONS WAS REPORTED AS \$178,509 WHEN THE AMOUNT IN BOX 5 OF HER W-2 FOR 2013 WAS \$173,496 RESULTING IN THE COMPENSATION BEING OVER REPORTED BY \$5,013. DURING 2014 THE MISSOURI HISTORICAL SOCIETY REIMBURSED THE NEWLY HIRED PRESIDENT FOR CERTAIN EXPENSES RELATED TO HER MOVE TO ST. LOUIS. SOME OF THESE AMOUNTS, TOTALING \$9,622, WERE INADVERTENTLY NOT INCLUDED AS WAGES ON HER 2014 W-2. UPON DISCOVERING THIS SITUATION, THE MISSOURI HISTORICAL SOCIETY FILED AN AMENDED FORM W-2 WITH THE IRS CORRECTING THIS SITUATION. IN ADDITION, THE AMOUNT CONTRIBUTED BY THE MISSOURI HISTORICAL SOCIETY TO THE PRESIDENT'S SECTION 457(B) PLAN WERE REPORTED IN BOTH THE BASE COMPENSATION AND RETIREMENT COMPENSATION COLUMNS, RESULTING IN AN OVERSTATEMENT OF THE PRESIDENT'S COMPENSATION IN THE AMOUNT OF \$8,272. IF THE CORRECT W-2 FOR 2014 HAD BEEN AVAILABLE WHEN

**Part III** Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

THE 2014 RETURN WAS PREPARED AND THE CONTRIBUTION TO THE 457(B) PLAN  
HAD BEEN PROPERLY REFLECTED, THE TOTAL COMPENSATION REPORTED FOR THE  
PRESIDENT IN THE 2014 FORM 990 WOULD HAVE BEEN \$1,350 HIGHER. IN  
SCHEDULE J TO THE 2014 FORM 990, CONTRIBUTIONS MADE BY THE MISSOURI  
HISTORICAL SOCIETY TO THE 401(A) PLAN ON BEHALF OF THE MANAGING  
DIRECTOR OF ADMINISTRATION AND OPERATIONS WAS INCLUDED IN THE  
NON-TAXABLE BENEFITS COLUMN RATHER THAT THE RETIREMENT AND OTHER  
DEFERRED COMPENSATION COLUMN. THE TOTAL COMPENSATION OF THE MANAGING  
DIRECTOR OF ADMINISTRATION AND OPERATIONS WAS REPORTED CORRECTLY.

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2016**

Open To Public Inspection

Department of the Treasury  
Internal Revenue Service

- ▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
- ▶ **Attach to Form 990.**
- ▶ **Information about Schedule M (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**

Name of the organization **MISSOURI HISTORICAL SOCIETY** Employer identification number **43-0654866**

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	2	17,689.	STOCK MARKET PRICE
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts	X	118	0.	
23 Scientific specimens				
24 Archeological artifacts				
25 Other ( )				
26 Other ( )				
27 Other ( )				
28 Other ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement **29**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) (2016)



**Part II Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, LINE 33:

THE MISSOURI HISTORICAL SOCIETY'S RESEARCH COLLECTIONS CONTAIN EXTENSIVE REGIONAL HISTORY OBJECTS AND ARTIFACTS DOCUMENTING THE HISTORY OF ST. LOUIS, MISSOURI, THE MISSISSIPPI AND MISSOURI RIVER VALLEYS AND THE AMERICAN WEST. THE DIVERSE COLLECTION SERVES A BROAD AUDIENCE OF LOCAL, NATIONAL AND INTERNATIONAL SCHOLARS, RESEARCHERS AND INDIVIDUALS INTERESTED IN LOCAL AND REGIONAL HISTORY. THE ORGANIZATION SHARES THE COLLECTION THROUGH REGULAR EDUCATIONAL AND PUBLIC PROGRAMS, EXHIBITIONS, PUBLICATIONS AND ON-LINE OFFERINGS AND APPLICATIONS.

THE VALUE OF THE MUSEUM AND LIBRARY COLLECTIONS CANNOT BE DETERMINED AND ARE THEREFORE NOT CAPITALIZED IN THE ACCOMPANYING FINANCIAL STATEMENTS. OBJECTS IN THE COLLECTIONS ARE INVENTORIED, CATALOGUED AND PRESERVED. COLLECTIONS AUDITS ARE PERFORMED REGULARLY. ANY PROCEEDS FROM DEACCESSIONS ARE RESTRICTED FOR THE ACQUISITION OF OTHER OBJECTS FOR THE COLLECTIONS.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**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 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

Open to Public  
Inspection

Name of the organization

MISSOURI HISTORICAL SOCIETY

Employer identification number

43-0654866

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

WHOSE PRIMARY FUNCTIONS ARE EDUCATIONAL AND COMMUNITY PROGRAMS;

COLLECTIONS AND CONSERVATION; LIBRARY AND RESEARCH; AND EXHIBITIONS.

MHS' MISSION IS TO SERVE AS THE CONFLUENCE OF HISTORICAL PERSPECTIVES

AND CONTEMPORARY ISSUES TO INSPIRE AND ENGAGE OUR AUDIENCES.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

AND EXHIBITIONS. MHS'S MISSION IS TO SERVE AS THE CONFLUENCE OF

HISTORICAL PERSPECTIVES AND CONTEMPORARY ISSUES TO INSPIRE AND ENGAGE

OUR AUDIENCES.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

ITEMS IN OUR COLLECTION AND ADDITIONAL OPPORTUNITIES TO BENEFIT FROM

OUR PROGRAMS. EXPENSES INCLUDE SALARIES, SUPPLIES, AND THE COSTS

ASSOCIATED WITH BOOKING TRAVELING EXHIBITS, INCLUDING SHIPPING AND

RENTAL FEES.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:

COLLECTION ACCESSIBLE TO THE PUBLIC THROUGH THE LIBRARY AND RESEARCH

CENTER, THE EXHIBITIONS AT THE MUSEUM, OUR ONLINE COLLECTIONS SEARCH,

AND VARIOUS SOCIAL MEDIA PLATFORMS. IN 2016, WE INVESTED IN A FILM

SCANNER GIVING US THE CAPABILITY TO DIGITIZE ALL FORMS OF SOUND AND

MOVING IMAGE FILM.

IN 2016, THERE WERE 6,722 IN-PERSON VISITS TO THE LIBRARY AND RESEARCH

CENTER AND 12,443 RESEARCHERS ASSISTED VIA PHONE, FAX, MAIL, OR EMAIL.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2016)

Name of the organization MISSOURI HISTORICAL SOCIETY	Employer identification number 43-0654866
---	--

1,021,527 VISITS TO OUR ONLINE CROSS COLLECTIONS SEARCH WITH 744,194  
UNIQUE VISITORS AND 3,114,870 VIEWED PAGES.

THE COLLECTIONS CURRENTLY CONSIST OF MORE THAN 179,000 ARTIFACTS IN A  
VARIETY OF FORMATS THAT DOCUMENT THE EVERYDAY LIFE OF THE DIVERSE  
INHABITANTS OF OUR REGION. THE LIBRARY CONTAINS MORE THAN 90,000  
VOLUMES. THE MANUSCRIPT COLLECTIONS COMPRISE MORE THAN 7,900 LINEAR  
FEET OF ORIGINAL MANUSCRIPT RECORDS. THE PHOTOGRAPHS AND PRINTS  
COLLECTIONS CONTAIN MORE THAN 1 MILLION IMAGES. THE SOUND AND MOVING  
IMAGES COLLECTION INCLUDES MORE THAN 74,000 ITEMS.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

THEATER PERFORMANCES REACHED 2,112 PEOPLE OVER THREE MONTHS. GROUP  
SALES HAD 284 GROUPS TOTALING 7,655 PEOPLE THAT TOURED THE MUSEUM AND  
ALSO LED 9 DISCOVERY BUS TOURS CONSISTING OF 351 PARTICIPANTS.  
VOLUNTEER SERVICES WORKED WITH 112 VOLUNTEERS WHO ASSISTED IN MANY  
FACETS OF MUSEUM OPERATIONS. THE COMMUNITY EDUCATION AND EVENTS  
DIVISION ALSO OFFERED THE MUSEUM'S LARGEST PROGRAM AS A TWELVE-WEEK  
OUTDOOR CONCERT SERIES THAT WELCOMED ABOUT 35,000 CONCERTGOERS. THE  
VISITOR EXPERIENCE DEPARTMENT HELPED FACILITATE ALL RESERVATIONS AND  
FRONT LINE SERVICES FOR ALL VISITORS TO THE MUSEUM.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

MARKETING AND COMMUNICATIONS DEPARTMENT:

THE MARKETING AND COMMUNICATIONS DEPARTMENT PROVIDES MARKETING AND  
PUBLIC RELATIONS ACTIVITIES FOR THE MISSOURI HISTORY MUSEUM, THE  
LIBRARY AND RESEARCH CENTER, AND SOLDIERS MEMORIAL MILITARY MUSEUM.  
ACTIVITIES INCLUDE MEDIA RELATIONS, MARKETING, ADVERTISING, SOCIAL

Name of the organization

MISSOURI HISTORICAL SOCIETY

Employer identification number

43-0654866

MEDIA, GRAPHIC DESIGN, PROMOTIONS, CRISIS COMMUNICATIONS, ETC.

THE MARKETING AND COMMUNICATIONS DEPARTMENT PREPARES AND DISTRIBUTES

MEDIA MATERIAL TO PRINT, ELECTRONIC, AND ONLINE MEDIA TO PROMOTE

INSTITUTIONAL EXHIBITIONS, EVENTS, PROGRAMS, AND GENERAL AWARENESS.

MEDIA REACH IS REGIONAL, STATEWIDE, AND, WHEN APPROPRIATE, NATIONAL.

DEPARTMENTAL PERSONNEL COORDINATE ALL INTERVIEWS RELATED TO THE

INSTITUTION, AS WELL AS PROVIDE IN-HOUSE MEDIA TRAINING FOR MUSEUM

STAFF.

THE MARKETING AND COMMUNICATIONS DEPARTMENT STAFF OVERSEES ALL

ADVERTISING AND MARKETING OPPORTUNITIES AND PROMOTIONAL PARTNERSHIPS,

INCLUDING DEVELOPING MARKETING PLANS, PLACING ALL PAID ADVERTISING

RELATED TO THE INSTITUTION; AND ESTABLISHING STRATEGIC MARKETING

COLLABORATIONS.

THE GRAPHICS TEAM MEMBERS WITHIN THE MARKETING AND COMMUNICATIONS

DEPARTMENT DESIGN AND PRODUCE INSTITUTIONAL COLLATERAL MATERIAL,

INCLUDING EXTERIOR AND INTERIOR SIGNAGE; QUARTERLY MEMBER MAGAZINE;

BANNERS; BROCHURES; DIRECT MAIL PIECES; POSTERS; WEB-BASED ELECTRONIC

PROMOTIONAL AND MARKETING MATERIAL; AND THE SOCIAL MEDIA TEAM WITHIN

THE DEPARTMENT COORDINATES THE INSTITUTIONAL PRESENCE ACROSS ALL SOCIAL

MEDIA CHANNELS, INCLUDING FACEBOOK, TWITTER, PINTEREST, AND YOUTUBE.

EXPENSES \$ 1,073,289. INCLUDING GRANTS OF \$ 0. REVENUE \$ 0.

SOLDIERS MEMORIAL:

THE MISSOURI HISTORICAL SOCIETY ENTERED INTO AGREEMENTS WITH THE CITY

OF ST. LOUIS AND THE SOLDIERS MEMORIAL LLC TO PROCESS THE COLLECTIONS

Name of the organization MISSOURI HISTORICAL SOCIETY	Employer identification number 43-0654866
---	--

OF THE SOLDIERS MEMORIAL MUSEUM. THE MISSOURI HISTORICAL SOCIETY (MHS) WILL INVENTORY AND PROCESS THE COLLECTIONS. ALL WORK WILL BE COMPLETED UNDER THE DIRECTION OF MHS. ADDITIONALLY, MHS WILL REVITALIZE THE SOLDIERS MEMORIAL MILITARY MUSEUM AND THE COURT OF HONOR. THE CITY OF ST. LOUIS PARTNERED WITH THE MISSOURI HISTORICAL SOCIETY BECAUSE OF MHS' EXTENSIVE EXPERIENCE WITH INVENTORY, PROCESSING, AND EXHIBITION OF HISTORICAL COLLECTIONS AND MUSUEM OPERATIONS. THE MHS IS AN ACCREDITED MUSEUM BY THE AMERICAN ALLIANCE OF MUSEUMS.

EXPENSES \$ 5,599,942. INCLUDING GRANTS OF \$ 0. REVENUE \$ 0.

## PUBLICATIONS:

THE PUBLICATIONS DIVISION PROVIDES A NUMBER OF SERVICES FOR THE MUSEUM. IN ADDITION TO PUBLISHING A NUMBER OF BOOKS EACH YEAR (NEW TITLES OR REPRINTS OF BOOKS PREVIOUSLY PUBLISHED BY THE MUSEUM), THEY ALSO PUBLISH AN ANNUAL MEMBERS MAGAZINE AND MAINTAIN AN ONLINE MAGAZINE WITH CONTINUOUSLY CHANGING ARTICLES. THEY PROVIDE EDITING SERVICES FOR OTHER DEPARTMENTS IN THE MUSEUM.

EXPENSES \$ 382,542. INCLUDING GRANTS OF \$ 0. REVENUE \$ 78,242.

## OTHER INCOME:

OTHER INCOME INCLUDES PHOTOS AND PRINT SALES, PHOTOCOPY SALES, ROYALTIES, DISCOVERY TOUR INCOME, EVENTS INCOME AND MISCELLANEOUS INCOME.

EXPENSES \$ 0. INCLUDING GRANTS OF \$ 0. REVENUE \$ 625,759.

## FORM 990, PART VI, SECTION A, LINE 7B:

THE SUBDISTRICT IS PART OF THE ZOOLOGICAL MUSEUM DISTRICT (ZMD). THE SUBDISTRICT WAS ESTABLISHED TO RECEIVE TAX REVENUES FROM THE TAX

Name of the organization MISSOURI HISTORICAL SOCIETY	Employer identification number 43-0654866
---	--

COLLECTOR'S OFFICES AND TO PAY FOR HISTORY MUSEUM SERVICES PROVIDED TO BENEFIT THE PUBLIC. THE ZMD TAX-GENERATED-REVENUE IS SUBJECT TO ANNUAL REVIEW AND APPROVAL. IN 1988, THE SUBDISTRICT AND THE MUSEUM ENTERED INTO A CONTRACT, WHICH WAS RENEGOTIATED IN THE FALL OF 2012, 2013 AND 2015. THE AGREEMENT RENEWS FOR ONE YEAR EACH DECEMBER 31, UNLESS THE SUBDISTRICT, UPON RECOMMENDATION OF ITS COMMITTEE ON RENEWAL, VOTES NOT TO RENEW THE CONTRACT. UPON GIVING WRITTEN NOTICE OF ITS INTENT NOT TO RENEW THE CONTRACT, THE MISSOURI HISTORICAL SOCIETY AND THE SUBDISTRICT ARE REQUIRED TO MEET FOR A PERIOD OF SIX MONTHS TO RESOLVE THEIR DIFFERENCES. IF THOSE DIFFERENCES ARE NOT RESOLVED, THE CONTRACT TERMINATES AT THE END OF THE CALENDAR YEAR IN WHICH SUCH FINAL DETERMINATION IS MADE. THE CONTRACT PROVIDES FOR HISTORY MUSEUM FACILITIES AND SERVICES TO BE PROVIDED TO THE PUBLIC BY THE HISTORICAL SOCIETY IN EXCHANGE FOR COMPENSATION FROM THE SUBDISTRICT. THE PUBLIC SUPPORT UNDER THIS CONTRACT IS DETERMINED EACH YEAR BASED UPON AN ANNUAL BUDGET. THE 2012 REVISED AGREEMENT CREATED JOINT BUDGET AND EXECUTIVE COMPENSATION COMMITTEES COMPOSED OF EQUAL NUMBERS OF TRUSTEES FROM THE MISSOURI HISTORICAL SOCIETY AND COMMISSIONERS OF THE SUBDISTRICT. THE AGREEMENT REQUIRES PRIOR SUBDISTRICT APPROVAL FOR THE PURCHASE OF ANY REAL ESTATE AND JOINT BUDGET COMMITTEE APPROVAL OF ANY UNBUDGETED EXPENDITURE IN EXCESS OF \$10,000. THE MISSOURI HISTORICAL SOCIETY IS INCLUDED AS A DISCRETELY PRESENTED COMPONENT UNIT WITHIN THE SUBDISTRICT'S FINANCIAL STATEMENTS.

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

THE FORM 990 IS PREPARED BY INDEPENDENT AUDITORS WITH INFORMATION PROVIDED BY THE FINANCE DEPARTMENT. IT IS REVIEWED BY THE PRESIDENT, THE CHIEF FINANCIAL OFFICER, THE MANAGING DIRECTOR OF ADMINISTRATION & OPERATIONS, THE AUDIT COMMITTEE, THE EXECUTIVE COMMITTEE, AND THE BOARD OF TRUSTEES

Name of the organization MISSOURI HISTORICAL SOCIETY	Employer identification number 43-0654866
---	--

PRIOR TO THE SUBMISSION OF THE FORM 990.

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

ANNUALLY, THE TRUSTEES ARE REQUIRED TO REVIEW THE MUSEUM'S CONFLICT OF INTEREST POLICY AND SIGN A FORM CONFIRMING THAT THEY HAVE READ THE POLICY. IF THERE IS THE POTENTIAL FOR A CONFLICT OF INTEREST, THEY ARE REQUIRED TO DOCUMENT THAT POTENTIAL. THESE TWO FORMS ARE THEN FORWARDED TO THE METROPOLITAN ZOO AND MUSEUM DISTRICT OF THE CITY OF ST. LOUIS AND ST. LOUIS COUNTY, THE TAXING AUTHORITY PROVIDING PARTIAL FINANCIAL SUPPORT TO THE MUSEUM. THE ORGANIZATION'S TOP MANAGEMENT OFFICIALS ANNUALLY SIGN A FORM CONFIRMING THAT THEY HAVE READ THE MUSEUM'S CONFLICT OF INTEREST POLICY. ALSO, THE EMPLOYEE HANDBOOK SPELLS OUT THE MUSEUM'S EMPLOYEE CONFLICT OF INTEREST POLICY AND EMPLOYEES ARE REQUIRED TO SIGN A FORM INDICATING THAT THEY HAVE READ AND UNDERSTAND THE REQUIREMENTS OF THE HANDBOOK.

FORM 990, PART VI, SECTION B, LINE 15:

THE JOINT EXECUTIVE COMPENSATION COMMITTEE, CONSISTING OF EQUAL NUMBERS OF MISSOURI HISTORICAL SOCIETY TRUSTEES AND MISSOURI HISTORY MUSEUM SUBDISTRICT COMMISSIONERS, HAVE THE RESPONSIBILITY OF REVIEWING AND RECOMMENDING THE COMPENSATION OF THE PRESIDENT OF THE MISSOURI HISTORICAL SOCIETY/MISSOURI HISTORY MUSEUM. THE CURRENT PRESIDENT BEGAN WORK ON APRIL 15, 2014 UNDER A COMPENSATION AGREEMENT PREPARED BY THE JOINT EXECUTIVE COMPENSATION COMMITTEE AND APPROVED BY THE BOARD OF TRUSTEES. THE REVIEW AND APPROVAL OF THE COMPENSATION FOR THE PRESIDENT AND SENIOR MANAGEMENT IS CONDUCTED IN ACCORDANCE WITH SECTION 4958 OF THE INTERNAL REVENUE CODE WITH RESPECT TO THE COMPARABLE INSTITUTIONS, BOTH LOCALLY AND NATIONALLY, AS WELL AS A REVIEW OF THE PERFORMANCE OF EACH MANAGER. THE JOINT EXECUTIVE COMPENSATION COMMITTEE HOLDS AT LEAST TWO MEETINGS ANNUALLY, ONE TO REVIEW

Name of the organization

MISSOURI HISTORICAL SOCIETY

Employer identification number

43-0654866

COMPARABLE INFORMATION, PERFORMANCE, AND TO DEVELOP RECOMMENDATIONS, AND  
 THE SECOND MEETING IS TO CONFIRM THAT DECISION PRIOR TO REPORTING TO THE  
 BOARD OF TRUSTEES.

FORM 990, PART VI, SECTION C, LINE 19:

AVAILABLE ON-LINE ON THE MUSEUM'S WEBSITE OR UPON REQUEST.

FORM 990, PART IX, LINE 11G, OTHER FEES:

SOLDIERS MEMORIAL CONSTRUCTION:

PROGRAM SERVICE EXPENSES 4,737,543.

MANAGEMENT AND GENERAL EXPENSES 0.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 4,737,543.

OTHER FEES:

PROGRAM SERVICE EXPENSES 134,628.

MANAGEMENT AND GENERAL EXPENSES 61,486.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 196,114.

TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A 4,933,657.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

SPLIT INTEREST CHANGE IN VALUE -34,111.



# Application for Automatic Extension of Time To File an Exempt Organization Return

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**

▶ **Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868) .**

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile), click on Charities & Non-Profits, and click on e-file for Charities and Non-Profits.

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

	Enter filer's identifying number	
<b>Type or print</b>	Name of exempt organization or other filer, see instructions. <b>MISSOURI HISTORICAL SOCIETY</b>	Employer identification number (EIN) or <b>43-0654866</b>
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. <b>P.O. BOX 11940</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>ST. LOUIS, MO 63112-0040</b>	

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 1

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**BENJAMIN C. WASHINGTON, CPA**

• The books are in the care of ▶ **5700 LINDELL BLVD - ST. LOUIS, MO 63112**  
Telephone No. ▶ **314-746-4421** Fax No. ▶ \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until **NOVEMBER 15, 2017**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶  calendar year **2016** or
- ▶  tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

**2** If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0.
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.