

Form **990**

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

2016
Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ 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.

A For the 2016 calendar year, or tax year beginning **JUL 1, 2016** and ending **JUN 30, 2017**

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	C Name of organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 123 EAST CANON PERDIDO STREET City or town, state or province, country, and ZIP or foreign postal code SANTA BARBARA, CA 93101	D Employer identification number 95-6111696 E Telephone number 805-966-1279
F Name and address of principal officer: DEBBY ACEVES SAME AS C ABOVE		G Gross receipts \$ 4,528,629. H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) H(c) Group exemption number ▶
I 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		
J Website: ▶ WWW.SBTHP.ORG		
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		L Year of formation: 1963 M State of legal domicile: CA

Part I Summary

1	Briefly describe the organization's mission or most significant activities: TO PRESERVE, REHABILITATE, RESTORE, RECONSTRUCT, OPERATE, AND INTERPRET HISTORIC		
2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
3	Number of voting members of the governing body (Part VI, line 1a)	3	24
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	0
5	Total number of individuals employed in calendar year 2016 (Part V, line 2a)	5	40
6	Total number of volunteers (estimate if necessary)	6	100
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
7b	Net unrelated business taxable income from Form 990-T, line 34	7b	0.
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year 240,215.	Current Year 536,470.
	9 Program service revenue (Part VIII, line 2g)	2,631.	3,685.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	312,505.	364,724.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	702,364.	897,869.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	1,257,715.	1,802,748.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	813,125.	722,275.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	3,600.	12,598.
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 25,632.		
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	638,912.	478,322.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	1,455,637.	1,213,195.
19 Revenue less expenses. Subtract line 18 from line 12	-197,922.	589,553.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 9,151,910.	End of Year 9,925,575.
	21 Total liabilities (Part X, line 26)	100,542.	55,421.
	22 Net assets or fund balances. Subtract line 21 from line 20	9,051,368.	9,870,154.

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.

Sign Here	Signature of officer DEBBY ACEVES, PRESIDENT Type or print name and title	Date			
Paid Preparer Use Only	Print/Type preparer's name GAIL H. ANIKOUCHINE	Preparer's signature	Date	Check if self-employed <input checked="" type="checkbox"/>	PTIN P00161999
	Firm's name ▶ ANIKOUCHINE & ASSOCIATES	Firm's EIN ▶ 81-4869549			
	Firm's address ▶ 7127 HOLLISTER AVE SUITE 25A-118 GOLETA, CA 93117	Phone no. 805-451-5430			

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

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

Form 990 (2016)

95-6111696 Page 2

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: TO RESTORE, PRESERVE, RECONSTRUCT, OPERATE AND INTERPRET EL PRESIDIO DE SANTA BARBARA STATE HISTORIC PARK, ITS NEIGHBORING PROPERTIES INCLUDING JIMMY'S ORIENTAL GARDENS AND CASA DE LA GUERRA, AS WELL AS THE SANTA INES MISSION MILLS IN THE SANTA YNEZ VALLEY. SBTHP ALSO

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 \$ 797,409. including grants of \$) (Revenue \$ 821,632.) ARCHAEOLOGY, RESEARCH, AND HISTORIC PRESERVATION:

THE TRUST CONTINUES TO CONDUCT ARCHAEOLOGICAL AND HISTORICAL RESEARCH IN SUPPORT OF THE SECRETARY OF THE INTERIOR'S STANDARDS FOR THE TREATMENT OF HISTORIC PROPERTIES, INCLUDING PRESERVATION (EL CUARTEL), RESTORATION (CASA DE LA GUERRA), REHABILITATION (PRESIDIO RESEARCH CENTER), AND RECONSTRUCTION (PRESIDIO CHAPEL, NORTHEAST CORNER AND NORTHWEST CORNER). THE TRUST CONDUCTS ARCHAEOLOGY, RESEARCH AND HISTORIC PRESERVATION WORK THAT INCLUDES THE PRESIDIO NORTHWEST CORNER, ALHECAMA THEATRE RESTORATION, AND PLANS FOR SEISMIC RETROFIT AND RESTORATION OF THE COTA KNOX BUILDING.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 797,409.

Form 990 (2016)

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Part IV Checklist of Required Schedules

	Yes	No
1 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>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors?</i>	X	
3 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>		X
4 Section 501(c)(3) organizations. 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>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 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>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a 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>	X	
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>		X
c 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>		X
d 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>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>		X
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>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
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>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 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>	X	
19 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>		X

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Form 990 (2016)

95-6111696 Page 4

Part IV Checklist of Required Schedules *(continued)*

		Yes	No
20a	Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X
22	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
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>		X
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		X
26	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
27	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
28	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):		
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	X	
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
c	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
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30	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
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32	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
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	X	
34	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
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
36	Section 501(c)(3) organizations. 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
37	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
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	X	

Form **990** (2016)

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

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

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4b	If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	X	
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7d	If "Yes," indicate the number of Forms 8282 filed during the year		
7e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
7h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
9a	Did the sponsoring organization make any taxable distributions under section 4966?		
9b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
10a	Initiation fees and capital contributions included on Part VIII, line 12		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11	Section 501(c)(12) organizations. Enter:		
11a	Gross income from members or shareholders		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
13a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.		
13b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans		
13c	Enter the amount of reserves on hand		
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
14b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Form 990 (2016)

95-6111696 Page **6**

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

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
	1a 24		
b	Enter the number of voting members included in line 1a, above, who are independent		
	1b 0		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	X	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?	X	
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	X	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	X	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

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

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?		X
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	X	
13	Did the organization have a written whistleblower policy?		X
14	Did the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official	X	
b	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed **CA**
- 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.
 Own website Another's website 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: **CAY SANCHEZ - 805-966-1279**
123 EAST CANON PERDIDO STREET, SANTA BARBARA, CA 93101

SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION

Form 990 (2016)

95-6111696 Page 7

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

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

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. 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) CRAIG MAKELA BOARD MEMBER	6.50	X					0.	0.	0.	
(2) ARTHUR NAJERA BOARD MEMBER	1.00	X					0.	0.	0.	
(3) KATIE HAY BOARD MEMBER	1.00	X					0.	0.	0.	
(4) TIMOTHY AGUILAR BOARD MEMBER	1.00	X					0.	0.	0.	
(5) W. ELLIOT BROWLEE TREASURER	3.00	X		X			0.	0.	0.	
(6) DOUGLAS CAMPBELL BOARD MEMBER	1.00	X					0.	0.	0.	
(7) RANDY BERGSTROM BOARD MEMBER	1.00	X					0.	0.	0.	
(8) ROB ROSSI BOARD MEMBER	1.00	X					0.	0.	0.	
(9) DONALD G. SHARPE BOARD MEMBER	1.00	X					0.	0.	0.	
(10) KEITH J. MAUTINO BOARD MEMBER	5.00	X					0.	0.	0.	
(11) ROBERT TULER BOARD MEMBER	2.00	X					0.	0.	0.	
(12) MICHAEL ARNOLD BOARD MEMBER	1.00	X					0.	0.	0.	
(13) JAMES BROOKS BOARD MEMBER	1.00	X					0.	0.	0.	
(14) DEBBY ACEVES FIRST VICE PRESIDENT 2017	3.00	X		X			0.	0.	0.	
(15) MAGGIE CAMPBELL SECOND VICE PRESIDENT	3.00	X		X			0.	0.	0.	
(16) JOHN POUCHER IMMEDIATE PAST PRESIDENT	3.00	X		X			0.	0.	0.	
(17) TEREASE CHIN PRESIDENT	3.00	X		X			0.	0.	0.	

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

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) SUZANNE SCHOMER FIRST VICE PRESIDENT 2016	3.00	X		X				0.	0.	0.
(19) MARY LOUISE DAYS BOARD MEMBER	6.00	X						0.	0.	0.
(20) KEVIN NIMMONS BOARD MEMBER	3.00	X						0.	0.	0.
(21) WAYNE NATALE BOARD MEMBER	1.00	X						0.	0.	0.
(22) KEVIN SNOW BOARD MEMBER	1.00	X						0.	0.	0.
(23) LESLIE ZOMALT BOARD MEMBER	1.00	X						0.	0.	0.
(24) ANTHONY GRUMBINE BOARD MEMBER	1.00	X						0.	0.	0.
(25) ANNE PETERSEN EXECUTIVE DIRECTOR	50.00			X				94,625.	0.	10,155.
(26) JARREL C. JACKMAN PRIOR EXECUTIVE DIRECTOR	50.00			X				60,758.	0.	4,940.
1b Sub-total								155,383.	0.	15,095.
c Total from continuation sheets to Part VII, Section A								69,279.	0.	3,282.
d Total (add lines 1b and 1c)								224,662.	0.	18,377.

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 0

	Yes	No
3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3	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? <i>If "Yes," complete Schedule J for such individual</i>	4	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? <i>If "Yes," complete Schedule J for such person</i>	5	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
NONE		

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 0

SEE PART VII, SECTION A CONTINUATION SHEETS

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

Form 990

95-6111696

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) SALLY FOUHSE CFO, BEGINNING	50.00			X				69,279.	0.	3,282.
(28) JACKIE ALARCON CFO, END OF YEAR	30.00			X				0.	0.	0.
Total to Part VII, Section A, line 1c								69,279.		3,282.

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Form 990 (2016)

95-6111696 Page **9**

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	
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b	24,880.				
	c Fundraising events	1c	4,850.				
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	506,740.				
	g Noncash contributions included in lines 1a-1f: \$						
	h Total. Add lines 1a-1f		536,470.				
	Program Service Revenue	2 a <u>ADMISSIONS</u>	Business Code 713990	3,685.	3,685.		
b							
c							
d							
e							
f All other program service revenue							
g Total. Add lines 2a-2f			3,685.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		163,061.			163,061.	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross rents	(i) Real	266,457.				
		(ii) Personal					
		b Less: rental expenses	22,021.				
		c Rental income or (loss)	244,436.				
	d Net rental income or (loss)		244,436.	244,436.			
	7 a Gross amount from sales of assets other than inventory	(i) Securities	2,854,090.				
		(ii) Other					
		b Less: cost or other basis and sales expenses	2,652,427.				
		c Gain or (loss)	201,663.				
	d Net gain or (loss)		201,663.			201,663.	
	8 a Gross income from fundraising events (not including \$ <u>4,850.</u> of contributions reported on line 1c). See Part IV, line 18	a	108,162.				
		b Less: direct expenses	49,057.				
c Net income or (loss) from fundraising events			59,105.			59,105.	
9 a Gross income from gaming activities. See Part IV, line 19	a	285.					
	b Less: direct expenses	0.					
	c Net income or (loss) from gaming activities		285.			285.	
10 a Gross sales of inventory, less returns and allowances	a	22,908.					
	b Less: cost of goods sold	2,376.					
	c Net income or (loss) from sales of inventory		20,532.			20,532.	
Miscellaneous Revenue		Business Code					
11 a REIMBURSED PAYROLL COSTS	900099	557,936.	557,936.				
b OTHER INCOME	900099	15,575.	15,575.				
c							
d All other revenue							
e Total. Add lines 11a-11d		573,511.					
12 Total revenue. See instructions.		1,802,748.	821,632.	0.	444,646.		

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Form 990 (2016)

95-6111696 Page **10**

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**

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(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	240,344.	192,548.	47,124.	672.
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	467,822.	452,789.	10,437.	4,596.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	1,618.	565.	623.	430.
10 Payroll taxes	12,491.	7,307.	4,885.	299.
11 Fees for services (non-employees):				
a Management				
b Legal	5,829.		5,829.	
c Accounting	20,400.		20,400.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17	12,598.			12,598.
f Investment management fees	52,392.		52,392.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	195,364.	111,844.	83,520.	
12 Advertising and promotion	6,923.	3,996.	2,307.	620.
13 Office expenses	74,073.	9,859.	57,797.	6,417.
14 Information technology				
15 Royalties				
16 Occupancy	21,745.		21,745.	
17 Travel	4,155.	1,536.	2,619.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	2,810.	2,810.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	32,718.		32,718.	
23 Insurance	27,425.		27,425.	
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 PROGRAM SUPPLIES	13,760.	13,760.		
b REPAIRS & MAINTENANCE	13,096.	395.	12,701.	
c LEASED EQUIPMENT	7,632.		7,632.	
d _____				
e All other expenses _____				
25 Total functional expenses. Add lines 1 through 24e	1,213,195.	797,409.	390,154.	25,632.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here if following SOP 98-2 (ASC 958-720)

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Form 990 (2016)

95-6111696 Page **11**

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	
Assets	1 Cash - non-interest-bearing	3,483.	1		3,465.	
	2 Savings and temporary cash investments	183,105.	2		825,401.	
	3 Pledges and grants receivable, net		3		6,000.	
	4 Accounts receivable, net		4			
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5			
	6 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		6			
	7 Notes and loans receivable, net	235,991.	7		226,438.	
	8 Inventories for sale or use	27,715.	8		34,146.	
	9 Prepaid expenses and deferred charges	2,666.	9		2,804.	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	3,085,588.	10a			
	b Less: accumulated depreciation	488,670.	10b			
	11 Investments - publicly traded securities	2,607,382.	10c		2,596,918.	
	12 Investments - other securities. See Part IV, line 11	5,907,413.	11		6,025,169.	
	13 Investments - program-related. See Part IV, line 11		12			
	14 Intangible assets		13			
	15 Other assets. See Part IV, line 11	184,155.	14			
16 Total assets. Add lines 1 through 15 (must equal line 34)	9,151,910.	15		205,234.		
		16		9,925,575.		
Liabilities	17 Accounts payable and accrued expenses	71,114.	17		14,993.	
	18 Grants payable		18			
	19 Deferred revenue		19			
	20 Tax-exempt bond liabilities		20			
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21			
	22 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		22			
	23 Secured mortgages and notes payable to unrelated third parties		23			
	24 Unsecured notes and loans payable to unrelated third parties		24		25,000.	
	25 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	29,428.	25		15,428.	
	26 Total liabilities. Add lines 17 through 25	100,542.	26		55,421.	
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.					
	27 Unrestricted net assets	1,831,340.	27		2,658,682.	
	28 Temporarily restricted net assets	6,506,028.	28		6,493,274.	
	29 Permanently restricted net assets	714,000.	29		718,198.	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.					
	30 Capital stock or trust principal, or current funds		30			
	31 Paid-in or capital surplus, or land, building, or equipment fund		31			
	32 Retained earnings, endowment, accumulated income, or other funds		32			
33 Total net assets or fund balances	9,051,368.	33		9,870,154.		
34 Total liabilities and net assets/fund balances	9,151,910.	34		9,925,575.		

Form **990** (2016)

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

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	1,802,748.
2 Total expenses (must equal Part IX, column (A), line 25)	2	1,213,195.
3 Revenue less expenses. Subtract line 2 from line 1	3	589,553.
4 Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	9,051,368.
5 Net unrealized gains (losses) on investments	5	221,721.
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	7,512.
10 Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	9,870,154.

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?	2a		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			
b Were the organization's financial statements audited by an independent accountant?	2b	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 checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
c 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?	2c	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?	3a		X
b 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	3b		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2016

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.

Open to Public Inspection

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

Name of the organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION
Employer identification number 95-6111696

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 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 X An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income.
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 main 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.

SANTA BARBARA TRUST FOR HISTORIC

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
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge ...						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources ...						
9 Net income from unrelated business activities, whether or not the business is regularly carried on ...						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 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						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2016 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2015 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2016. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 33 1/3% support test - 2015. 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 stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2016. 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 stop here. 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 10% -facts-and-circumstances test - 2015. 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 stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. 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
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	300,387.	646,434.	341,052.	240,215.	536,470.	2,064,558.
2 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	424,245.	458,694.	524,689.	541,906.	584,529.	2,534,063.
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5	724,632.	1,105,128.	865,741.	782,121.	1,120,999.	4,598,621.
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						0.
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	98,532.	382,849.	85,934.	60,508.	353,723.	981,546.
c Add lines 7a and 7b	98,532.	382,849.	85,934.	60,508.	353,723.	981,546.
8 Public support. (Subtract line 7c from line 6.)						3,617,075.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
9 Amounts from line 6	724,632.	1,105,128.	865,741.	782,121.	1,120,999.	4,598,621.
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	312,102.	378,320.	337,578.	330,191.	429,518.	1,787,709.
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b	312,102.	378,320.	337,578.	330,191.	429,518.	1,787,709.
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)	1,036,734.	1,483,448.	1,203,319.	1,112,312.	1,550,517.	6,386,330.

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

15 Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f))	15	56.64 %
16 Public support percentage from 2015 Schedule A, Part III, line 15	16	60.56 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2016 (line 10c, column (f) divided by line 13, column (f))	17	27.99 %
18 Investment income percentage from 2015 Schedule A, Part III, line 17	18	27.35 %

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
1 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>		
2 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>		
3a 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 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>		
c 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>		
4a 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 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>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <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>		
5a 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 Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 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>		
8 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>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
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>		
c 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>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer 10b below.</i>		
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
11 Has the organization accepted a gift or contribution from any of the following persons?		
a 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 A family member of a person described in (a) above?		
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.		
11a		
11b		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 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? 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.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
1		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 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?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 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? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		
1		
2		
3		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).			
2 Activities Test. Answer (a) and (b) below.		Yes	No
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
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? 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.			
3 Parent of Supported Organizations. Answer (a) and (b) below.			
a 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? Provide details in Part VI.			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.			
2a			
2b			
3a			
3b			

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.

Section A - Adjusted Net Income		(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	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(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	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
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	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount		(A) Prior Year	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	Distributable Amount. 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).		

SANTA BARBARA TRUST FOR HISTORIC

Schedule A (Form 990 or 990-EZ) 2016 PRESERVATION

95-6111696 Page 7

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

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

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

Schedule A (Form 990 or 990-EZ) 2016

SANTA BARBARA TRUST FOR HISTORIC

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.)

Multiple horizontal lines for supplemental information.

Schedule A Excess Payments from Non-Disqualified Persons Included on Part III, Line 7b

2016

** Do Not File **

*** Not Open to Public Inspection ***

Payer's Name	2012 Amount	2013 Amount	2014 Amount	2015 Amount	2016 Amount
OUTHWAITE CHARITABLE TRUST	74,633.	87,666.	82,967.	38,877.	34,495.
HIND FOUNDATION	0.	219,851.	0.	0.	0.
HUTTON PARKER FOUNDATION	0.	40,166.	0.	0.	34,495.
ANN JACKSON FAMILY FOUNDATION	14,633.	35,166.	0.	0.	0.
WILLIAMS CORBETT FOUNDATION	4,633.	0.	0.	0.	0.
TOWBES FOUNDATION	4,633.	0.	2,967.	3,877.	0.
GRIFFITHS CHARITABLE FOUNDATION	0.	0.	0.	3,877.	0.
MOSHER FOUNDATION	0.	0.	0.	13,877.	0.
VIRGINA RIDDER	0.	0.	0.	0.	284,733.
BOB TULER	0.	0.	0.	0.	0.
Total to Schedule A, Part III, Line 7b	98,532.	382,849.	85,934.	60,508.	353,723.

Schedule A Identification of Excess Support Payments Included on Part III, Line 7b, column (e) 2016

** Do Not File **
*** Not Open to Public Inspection ***

Table with 3 columns: Payer's Name, Amount Received in 2016, and 2016 Excess Payments. Rows include OUTHWAITE CHARITABLE TRUST, HUTTON PARKER FOUNDATION, TOWBES FOUNDATION, GRIFFITHS CHARITABLE FOUNDATION, VIRGINA RIDDER, and BOB TULER. Total Excess Payments to Schedule A, Part III, Line 7b, column (e) is 353,723.

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.

OMB No. 1545-0047

2016

Name of the organization

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

Employer identification number

95-6111696

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 SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	---

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	BALMASEDA WINERY P.O. BOX 914 VENTURA, CA 93001	\$ 5,400.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> <p style="font-size: small;">(Complete Part II for noncash contributions.)</p>
2	GRIFFITHS CHARITABLE TRUST P.O. BOX 2340 SANTA BARBARA, CA 93120	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <p style="font-size: small;">(Complete Part II for noncash contributions.)</p>
3	HUTTON PARKER FOUNDATION 26 WEST ANAPAMU STREET, 4TH FLOOR SANTA BARBARA, CA 93101	\$ 50,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <p style="font-size: small;">(Complete Part II for noncash contributions.)</p>
4	JOHN & BEVERLEY STAUFFER FOUNDATION 333 SOUTH HOPE STREET, 48TH FLOOR LOS ANGELES, CA 90071	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <p style="font-size: small;">(Complete Part II for noncash contributions.)</p>
5	MONTECITO BANK & TRUST 1010 STATE STREET SANTA BARBARA, CA 93101	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <p style="font-size: small;">(Complete Part II for noncash contributions.)</p>
6	OUTHWAITE CHARITABLE TRUST 26 WEST ANAPAMU STREET, STE 103 SANTA BARBARA, CA 93101	\$ 50,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <p style="font-size: small;">(Complete Part II for noncash contributions.)</p>

Name of organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	---

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
7	THE TOWBES FOUNDATION P.O. BOX 20130 SANTA BARBARA, CA 93120	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	VIRGINIA RIDDER 3101 THAELL RD RYE, NY 10580	\$ 300,238.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9	BOB TULER 205 E CARRILLO ST., STE 100 SANTA BARBARA, CA 93101	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
10	IVANO PAOLO VIT 419 E ARRELLAGA ST. #A SANTA BARBARA, CA 93101	\$ 12,000.	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.)
	_____ _____ _____	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	--

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
1	CASES OF WINE <hr/> <hr/> <hr/>	\$ 5,400.	05/31/17
	<hr/> <hr/> <hr/>	\$ _____	_____
	<hr/> <hr/> <hr/>	\$ _____	_____
	<hr/> <hr/> <hr/>	\$ _____	_____
	<hr/> <hr/> <hr/>	\$ _____	_____
	<hr/> <hr/> <hr/>	\$ _____	_____
	<hr/> <hr/> <hr/>	\$ _____	_____

Name of organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	---

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

(e) Transfer of gift	
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

(e) Transfer of gift	
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

(e) Transfer of gift	
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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**
▶ **Attach to Form 990.**

OMB No. 1545-0047

2016

Open to Public Inspection

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

Name of the organization **SANTA BARBARA TRUST FOR HISTORIC PRESERVATION** **Employer identification number**
95-6111696

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.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
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?		<input type="checkbox"/> Yes <input type="checkbox"/> 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?		<input type="checkbox"/> Yes <input type="checkbox"/> No

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).
 Preservation of land for public use (e.g., recreation or education) Preservation of a historically important land area
 Protection of natural habitat Preservation of a certified historic structure
 Preservation of open space

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.

	Held at the End of the Tax Year
a Total number of conservation easements	2a 1
b Total acreage restricted by conservation easements	2b 0.50
c Number of conservation easements on a certified historic structure included in (a)	2c 1
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d 0

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ 0

4 Number of states where property subject to conservation easement is located ▶ 1

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ 50

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ 2,500.

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)?

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.

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.

b 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

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

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
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

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	1,037,287.	1,104,717.	745,050.	744,700.	744,675.
b Contributions	4,198.	6,829.	364,453.	350.	25.
c Net investment earnings, gains, and losses	48,760.	-39,791.	11,946.		
d Grants or scholarships					
e Other expenditures for facilities and programs	5,407.	34,468.	16,732.		
f Administrative expenses					
g End of year balance	1,084,838.	1,037,287.	1,104,717.	745,050.	744,700.

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

- a** Board designated or quasi-endowment 23.00 %
- b** Permanent endowment 66.00 %
- c** Temporarily restricted endowment 11.00 %

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:

	Yes	No
(i) unrelated organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(ii) related organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	<input type="checkbox"/>	<input type="checkbox"/>

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		1,991,735.		1,991,735.
b Buildings		763,661.	275,376.	488,285.
c Leasehold improvements				
d Equipment				
e Other		330,192.	213,294.	116,898.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				2,596,918.

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

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)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" 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)	
Total. (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) DEPOSITS	15,428.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	15,428.

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

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

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.

1	Total revenue, gains, and other support per audited financial statements		1	2,001,610.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	221,721.	
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	29,533.	
e	Add lines 2a through 2d	2e		251,254.
3	Subtract line 2e from line 1	3		1,750,356.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	52,392.	
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b	4c		52,392.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5		1,802,748.

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.

1	Total expenses and losses per audited financial statements		1	1,182,824.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d	22,021.	
e	Add lines 2a through 2d	2e		22,021.
3	Subtract line 2e from line 1	3		1,160,803.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	52,392.	
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b	4c		52,392.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5		1,213,195.

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 II, LINE 9:

THE CONSERVATION EASEMENT IS NOT INCLUDED IN THE TRUST'S BALANCE SHEET OR STATEMENT OF OPERATIONS.

PART III, LINE 4:

THE TRUST'S COLLECTIONS ARE HISTORICALLY SIGNIFICANT ARTIFACTS FROM SANTA BARBARA AND FURTHER THE ORGANIZATION'S MISSION TO RESTORE AND PRESERVE HISTORICAL ARCHAEOLOGICAL SITES IN SANTA BARBARA.

PART V, LINE 4:

IN THE ABSENCE OF DONOR STIPULATIONS, THE INTENDED USE FOR THE ENDOWMENT FUNDS WILL BE TO CARRY ON THE ORGANIZATION'S MISSION STATEMENT.

SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION

Part XIII Supplemental Information (continued)

PART XI, LINE 2D - OTHER ADJUSTMENTS:

CHANGE IN CRT

RENTAL EXPENSES

PART XII, LINE 2D - OTHER ADJUSTMENTS:

RENTAL EXPENSES

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

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities
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.

▶ 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.

OMB No. 1545-0047

2016

**Open to Public
Inspection**

Name of the organization **SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Employer identification number
95-6111696

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

SANTA BARBARA TRUST FOR HISTORIC

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))	
		CASA CANTINA EVENT		NONE		
Revenue		(event type)	(event type)	(total number)		
1	Gross receipts	105,632.			105,632.	
2	Less: Contributions	4,850.			4,850.	
3	Gross income (line 1 minus line 2)	100,782.			100,782.	
Direct Expenses	4	Cash prizes				
	5	Noncash prizes				
	6	Rent/facility costs	3,055.			3,055.
	7	Food and beverages	12,000.			12,000.
	8	Entertainment	9,120.			9,120.
	9	Other direct expenses	24,882.			24,882.
10	Direct expense summary. Add lines 4 through 9 in column (d)				49,057.	
11	Net income summary. Subtract line 10 from line 3, column (d)				51,725.	

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: _____

SANTA BARBARA TRUST FOR HISTORIC

- 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:

a The organization's facility	13a	%
b An outside facility	13b	%
- 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

SCHEDULE L (Form 990 or 990-EZ)

Transactions With Interested Persons

OMB No. 1545-0047

2016

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b. Attach to Form 990 or Form 990-EZ. Information about Schedule L (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open To Public Inspection

Name of the organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION Employer identification number 95-6111696

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

Table with 4 columns: (a) Name of disqualified person, (b) Relationship between disqualified person and organization, (c) Description of transaction, (d) Corrected? (Yes/No)

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958 \$
3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization \$

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

Table with 9 columns: (a) Name of interested person, (b) Relationship with organization, (c) Purpose of loan, (d) Loan to or from the organization? (To/From), (e) Original principal amount, (f) Balance due, (g) In default? (Yes/No), (h) Approved by board or committee? (Yes/No), (i) Written agreement? (Yes/No)

Total \$

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

Table with 5 columns: (a) Name of interested person, (b) Relationship between interested person and the organization, (c) Amount of assistance, (d) Type of assistance, (e) Purpose of assistance

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

Schedule L (Form 990 or 990-EZ) 2016

SANTA BARBARA TRUST FOR HISTORIC

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
TEREASE CHIN, BOARD PRESIDENT	BANKER	52,392.	TEREASE CHIN		X
SUZANNE SCHOMER, FIRST VICE-PRESIDENT	BANKER	52,392.	SUZANNE SCHOMER		X
KEVIN NIMMONS, BOARD TRUSTEE	LEGAL COUNSEL	30,014.	KEVIN NIMMONS		X
MAGGIE CAMPBELL, SECOND VICE-PRESIDENT	EXECUTIVE DIRECTOR	2,230.	MAGGIE CAMPBELL		X
CRAIG MAKELA, BOARD TRUSTEE	OLIVE OIL BOTTLING	828.	CRAIG MAKELA		X
ANTHONY GRUMBINE, BOARD TRUSTEE	ARCHITECT	5,733.	ANTHONY GRUMBINE		X

Part V Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: TEREASE CHIN, BOARD PRESIDENT

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

BANKER

(C) AMOUNT OF TRANSACTION \$ 52,392.

(D) DESCRIPTION OF TRANSACTION: TEREASE CHIN IS A VICE-PRESIDENT OF MONTECITO BANK & TRUST WHERE THE TRUST HOLDS INVESTMENT FUNDS. MONTECITO BANK & TRUST WAS PAID INVESTMENT FEES TOTALING \$52,392 DURING THE YEAR ENDED JUNE 30, 2017.

(E) SHARING OF ORGANIZATION REVENUES? = NO

(A) NAME OF PERSON: SUZANNE SCHOMER, FIRST VICE-PRESIDENT

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

BANKER

(C) AMOUNT OF TRANSACTION \$ 52,392.

(D) DESCRIPTION OF TRANSACTION: SUZANNE SCHOMER IS A VICE-PRESIDENT OF MONTECITO BANK & TRUST WHERE THE TRUST HOLDS INVESTMENT FUNDS. MONTECITO BANK & TRUST WAS PAID INVESTMENT FEES TOTALING \$52,392 DURING THE YEAR ENDED JUNE 30, 2017.

(E) SHARING OF ORGANIZATION REVENUES? = NO

Part V Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule L (see instructions).

(A) NAME OF PERSON: KEVIN NIMMONS, BOARD TRUSTEE

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

LEGAL COUNSEL

(C) AMOUNT OF TRANSACTION \$ 30,014.

(D) DESCRIPTION OF TRANSACTION: KEVIN NIMMONS WORKS FOR THE TRUST'S
PRIMARY LEGAL FIRM TO WHICH THE TRUST PAID FEES IN THE ORDINARY COURSE OF
BUSINESS FOR THE YEAR ENDED JUNE 30, 2017.

(E) SHARING OF ORGANIZATION REVENUES? = NO

(A) NAME OF PERSON: MAGGIE CAMPBELL, SECOND VICE-PRESIDENT

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

EXECUTIVE DIRECTOR

(C) AMOUNT OF TRANSACTION \$ 2,230.

(D) DESCRIPTION OF TRANSACTION: MAGGIE CAMPBELL IS THE EXECUTIVE
DIRECTOR OF DOWNTOWN SANTA BARBARA TO WHICH THE TRUST PAYS DUES AND FEES
AND REIMBURSES THE ORGANIZATION FOR MEETING EXPENSES.

(E) SHARING OF ORGANIZATION REVENUES? = NO

(A) NAME OF PERSON: CRAIG MAKELA, BOARD TRUSTEE

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

OLIVE OIL BOTTLING

(C) AMOUNT OF TRANSACTION \$ 828.

(D) DESCRIPTION OF TRANSACTION: CRAIG MAKELA AND HIS SON WERE PAID \$828
FOR BOTTLING OF OLIVE OIL FROM THE TRUST'S TREES IN THE CURRENT YEAR.

(E) SHARING OF ORGANIZATION REVENUES? = NO

(A) NAME OF PERSON: ANTHONY GRUMBINE, BOARD TRUSTEE

Part V Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule L (see instructions).

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

ARCHITECT

(C) AMOUNT OF TRANSACTION \$ 5,733.

(D) DESCRIPTION OF TRANSACTION: ANTHONY GRUMBINE IS A PRINCIPAL
ARCHITECT AT HARRISON DESIGN. THE TRUST PAID HARRISON DESIGN \$5,733 FOR
ARCHITECTURAL PLANS AND PROJECT OVERSIGHT DURING THE CURRENT YEAR.

(E) SHARING OF ORGANIZATION REVENUES? = NO

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.

OMB No. 1545-0047

2016

Open to Public
Inspection

Name of the organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	---

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
 SITES, BUILDINGS, OBJECTS, AND ANTIQUITIES OF HISTORICAL SIGNIFICANCE IN
 THE COUNTY OF SANTA BARBARA, INCLUDING, BUT NOT LIMITED TO THE EL
 PRESIDIO DE SANTA BARBARA STATE HISTORIC PARK, CASA DE LA GUERRA,
 JIMMY'S ORIENTAL GARDENS, HISTORIC EL PASEO, AND THE SANTA INES MISSION
 MILLS.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
 SUPPORTS THE PROTECTION AND PRESERVATION OF OTHER SIGNIFICANT HISTORIC
 SITES IN SANTA BARBARA COUNTY.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:
 EDUCATION, INTERPRETATION, HISTORICAL RESEARCH, AND VOLUNTEER
 MANAGEMENT:

AS PART OF OUR COMMITMENT TO EDUCATION, WE CONTINUE TO PROVIDE ON-SITE
 TOURS USING CALIFORNIA DEPARTMENT OF EDUCATION K-12 CURRICULUM
 FRAMEWORK TO OVER 1,000 SCHOOL-AGE STUDENTS. OVER 900 STUDENTS AND 150
 ADULTS PARTICIPATE IN OUR ANNUAL CULTURAL ARTS AND SUMMER ADVENTURES
 (CASA) CAMP FOR AT-RISK YOUTH, AND EARLY CALIFORNIA DAYS. COMMUNITY
 PROGRAMMING INCLUDES LIVING HISTORY EVENTS OFFERED FREE OF CHARGE, AND
 A PUBLIC LECTURE SERIES ON TOPICS RELATED TO COMMUNITY HISTORY AND
 CULTURE WHICH ATTRACTS 1,000 VISITORS. TO HONOR THE HISTORIC ASIAN
 AMERICAN COMMUNITY IN THE PRESIDIO NEIGHBORHOOD, THE TRUST HOSTS AN
 ANNUAL ASIAN AMERICAN FILM SERIES AND ASIAN AMERICAN NEIGHBORHOOD
 FESTIVAL, NOW BOTH IN THEIR SEVENTH YEAR. THE FILM SERIES REGULARLY

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 SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
---	--

FILLS THE HOUSE, AND OVER 800 VISITORS ATTEND THE FESTIVAL.
 INFORMATION ON CURRENT PROJECTS, EVENTS, AND PROGRAMS IS AVAILABLE VIA
 THE TRUST'S WEBSITE AT WWW.SBTHP.ORG.

PROPERTY ACQUISITIONS, PROPERTY MANAGMENT AND COMMUNITY PARTNERSHIPS:

IN KEEPING WITH THE PARK'S GENERAL PLAN, THE TRUST COMPLETED
 RECONSTRUCTION OF A SECTION OF THE NORTHWEST CORNER DEFENSE WALL AT EL
 PRESIDIO DE SANTA BARBARA HISTORIC PARK; IT ALSO CONTINUES TO PARTNER
 WITH A LOCAL BUSINESS IN THE RESTORATION OF THE INTERIOR OF THE
 HISTORIC JIMMY'S ORIENTAL GARDENS BAR. THE TRUST HAS DEVELOPED FORMAL
 AGREEMENTS WITH CA STATE PARKS, OLD MISSION SANTA INES, AND THE CITY OF
 SOLVANG TO COMPLETE THE PLANNING PROCESS FOR THE FUTURE SANTA INES
 MISSION MILLS STATE HISTORIC PARK. THE TRUST HOSTS SPECIAL EVENTS AT
 THE SANTA INES MISSION MILLS THAT ARE ATTENDED BY THE PUBLIC. A
 CURRENT LIST OF TRUST OWNED/OPERATED PROPERTIES IN THE PRESIDIO
 NEIGHBORHOOD IS AVAILABLE UPON REQUEST.

FORM 990, PART VI, SECTION A, LINE 2:
 BOARD MEMEBER JOHN POUCHER IS A RETIRED PARTNER OF THE ORGANIZATION'S LAW
 FIRM AND BOARD MEMBER KEVIN NIMMONS IS AN EMPLOYEE OF THE SAME FIRM.

FORM 990, PART VI, SECTION A, LINE 6:
 THE TRUST IS A MEMBERSHIP ORGANIZATION. MEMBERS CONSIST OF INDIVIDUALS AND
 ORGANIZATIONS FROM THE COMMUNITY WHO BECOME MEMBERS THROUGH MONETARY OR
 OTHER CONTRIBUTIONS SUPPORTING THE ORGANIZATION'S MISSION.

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

Name of the organization **SANTA BARBARA TRUST FOR HISTORIC PRESERVATION**

Employer identification number
95-6111696

A NOMINATING COMMITTEE, MADE UP OF THE TRUST'S MEMBERS, NOMINATED CANDIDATES FOR THE BOARD OF DIRECTORS. EACH YEAR THE TRUST HAS AN ANNUAL MEETING WHERE THE MEMBERS ELECT THE BOARD OF DIRECTORS BASED ON THE NOMINATING COMMITTEE'S RECOMMENDATIONS.

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

EACH YEAR AT THE ANNUAL MEETING, THE MEMBERS RATIFY THE ACTIONS TAKEN BY THE BOARD OF DIRECTORS DURING THE PRIOR YEAR.

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

THE ENTIRE BOARD OF DIRECTORS RECEIVES A COPY OF THE 990. THE EXECUTIVE COMMITTEE MEETS TO REVIEW THE 990 TO ENSURE THAT THE 990 IS COMPLETE AND ACCURATE.

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

EACH NEW BOARD MEMBER IS REQUIRED TO SIGN A CONFLICT OF INTEREST DISCLOSURE AND ALL BOARD MEMBERS SIGN A NEW CONFLICT OF INTEREST DISCLOSURE EACH JANUARY.

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

COMPENSATION IS SET BY BOARD ACTION. COMPENSATION IS FIRST REVIEWED BY THE FINANCE COMMITTEE, FOLLOWED BY THE EXECUTIVE COMMITTEE, THEN BY THE FULL BOARD. COMMITTEE MEMBERS DISCUSS COMPARABILITY DATA.

FORM 990, PART VI, SECTION C, LINE 18:

THE 990 IS AVAILABLE UPON REQUEST AND IS ALSO LOCATED ON GUIDESTAR'S WEBSITE AT WWW.GUIDESTAR.ORG

Name of the organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	--

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

BYLAWS AND ARTICLES OF INCORPORATION ARE MADE AVAILABLE TO ANY INTERESTED PARTIES UPON REQUEST. FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC AT AN ANNUAL MEETING EACH JANUARY. THE CONFLICT OF INTEREST POLICY IS AVAILABLE UPON REQUEST.

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

CONTRACTED SERVICES - PROGRAM:

PROGRAM SERVICE EXPENSES	111,844.
MANAGEMENT AND GENERAL EXPENSES	0.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	111,844.

CONTRACTED SERVICES - ADMINISTRATIVE:

PROGRAM SERVICE EXPENSES	0.
MANAGEMENT AND GENERAL EXPENSES	83,520.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	83,520.
TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A	195,364.

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

CHANGE IN CRT	7,512.
---------------	--------

FORM 990, PART XII, LINE 2C:

THE AUDIT COMMITTEE ASSUMES RESPONSIBILITY FOR THE AUDIT AND SELECTION OF INDEPENDENT ACCOUNTANT. THIS PROCESS HAS NOT CHANGED SINCE THE PRIOR YEAR.

Name of the organization SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number 95-6111696
--	---

FORM 990, PART VI, SECTION A

EXECUTIVE COMMITTEE:

PER THE BOARD'S BYLAWS: "THE BOARD OF DIRECTORS SHALL CONFIRM AN EXECUTIVE COMMITTEE IS COMPOSED OF THE BOARD PRESIDENT, FIRST VICE-PRESIDENT, SECOND VICE-PRESIDENT, SECRETARY, AND TREASURER. EACH OF THESE FIVE OFFICERS SHALL SERVE ON ONE OF THE STANDING COMMITTEES. TO MAINTAIN CONTINUITY, THE IMMEDIATE PAST PRESIDENT SHALL ALSO SERVE ON THE EXECUTIVE COMMITTEE. THE BOARD MAY DELEGATE TO THE EXTENT PROVIDED BY RESOLUTION OF THE BOARD OF THE BYLAWS TO THE EXECUTIVE COMMITTEE ANY OF THE POWERS AND AUTHORITY OF THE BOARD IN THE MANAGEMENT OF THE BUSINESS AND AFFAIRS OF THE CORPORATION, INCLUDING RECOMMENDATION OF AN ANNUAL BUDGET TO THE BOARD OF DIRECTORS, EXCEPT AS LIMITED BY CALIFORNIA CORPORATIONS CODE SECTION 5212 (A).

THE EXECUTIVE COMMITTEE SHALL MEET AT LEAST MONTHLY ON A DATE PRIOR TO THE MONTHLY BOARD OF DIRECTORS MEETINGS."

THE EXECUTIVE COMMITTEE MET AT LEAST 12 TIMES DURING THE YEAR ENDED JUNE 30, 2016.

**SCHEDULE R
(Form 990)**

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
▶ Attach to Form 990.

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

OMB No. 1545-0047

2016

Open to Public Inspection

Name of the organization **SANTA BARBARA TRUST FOR HISTORIC PRESERVATION** Employer identification number **95-6111696**

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
LOMPOC PRESERVATION PROPERTIES, LLC - 95-6111696, 123 EAST CANON PERDIDO, SANTA BARBARA, CA 93101	RENTAL REAL ESTATE	CALIFORNIA	14,026.	634,616.	SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No

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

SEE PART VII FOR CONTINUATIONS

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Part III Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	1a	
b Gift, grant, or capital contribution to related organization(s)	1b	
c Gift, grant, or capital contribution from related organization(s)	1c	
d Loans or loan guarantees to or for related organization(s)	1d	
e Loans or loan guarantees by related organization(s)	1e	
f Dividends from related organization(s)	1f	
g Sale of assets to related organization(s)	1g	
h Purchase of assets from related organization(s)	1h	
i Exchange of assets with related organization(s)	1i	
j Lease of facilities, equipment, or other assets to related organization(s)	1j	
k Lease of facilities, equipment, or other assets from related organization(s)	1k	
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	
m Performance of services or membership or fundraising solicitations by related organization(s)	1m	
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	
o Sharing of paid employees with related organization(s)	1o	
p Reimbursement paid to related organization(s) for expenses	1p	
q Reimbursement paid by related organization(s) for expenses	1q	
r Other transfer of cash or property to related organization(s)	1r	
s Other transfer of cash or property from related organization(s)	1s	

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			

**SANTA BARBARA TRUST FOR HISTORIC
PRESERVATION**

Part VI Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners sec. 501(c)(3) orgs.?		(f) Share of total income	(g) Share of end-of-year assets	(h) Dispropor- tionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	

Part VII Supplemental Information.

Provide additional information for responses to questions on Schedule R. See instructions.

PART I, IDENTIFICATION OF DISREGARDED ENTITIES:

NAME OF DISREGARDED ENTITY:

LOMPOC PRESERVATION PROPERTIES, LLC

DIRECT CONTROLLING ENTITY: SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
2	LAND - CASA DE LA GUERRA	03/31/07	L				58,735.				58,735.			0.	
3	LAND - DE LA GUERRA COMPLEX	03/01/07	L				125,000.				125,000.			0.	
6	LAND- JIMMY'S ORIENTAL GARDENS	03/31/07	L				610,500.				610,500.			0.	
8	BLDG - CASA DE LA GUERRA	06/01/72	SL	35.00		16	125,291.				125,291.	125,291.		0.	125,291.
9	BUILDING-JIMMY'S ORIENTAL GARDENS (1/3)	03/31/07	SL	39.00	MM	16	383,370.				383,370.	94,489.		9,830.	104,319.
11	OFFICE FURNITURE	06/07/73	SL	7.00		16	87.				87.	87.		0.	87.
12	FILE CABINET	05/01/85	SL	7.00		16	201.				201.	201.		0.	201.
13	ALARM	08/24/89	200DB	5.00	HY	17	245.				245.	245.		0.	245.
14	COMPUTER FUND	09/15/97	200DB	5.00	HY	17	1,976.				1,976.	1,976.		0.	1,976.
15	COMPUTER SOFTWARE	09/15/97	SL	3.00		16	5,000.				5,000.	5,000.		0.	5,000.
16	1992 FORD	07/02/92	200DB	5.00	HY	17	8,512.				8,512.	8,512.		0.	8,512.
17	COMPUTER	04/26/00	200DB	5.00	HY	17	1,679.				1,679.	1,679.		0.	1,679.
18	FURNITURE-STANDS	05/31/00	200DB	7.00	HY	17	2,000.				2,000.	2,000.		0.	2,000.
19	FURNITURE	08/31/00	200DB	7.00	HY	17	3,000.				3,000.	3,000.		0.	3,000.
20	COMPUTER	10/26/00	200DB	5.00	HY	17	2,889.				2,889.	2,889.		0.	2,889.
21	FURNITURE	10/31/00	200DB	7.00	HY	17	1,646.				1,646.	1,646.		0.	1,646.
22	EQUIPMENT	02/21/01	200DB	7.00	HY	17	8,168.				8,168.	8,168.		0.	8,168.
23	FURNITURE	07/31/01	200DB	7.00	HY	17	1,708.				1,708.	1,708.		0.	1,708.

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
24	COMPUTER - ARCH LAB	09/18/01	200DB	5.00		HY17	983.				983.	983.		0.	983.
25	COMPUTER - CURATORIAL	12/10/01	200DB	5.00		HY17	1,170.				1,170.	1,170.		0.	1,170.
26	COMPUTER	09/10/02	200DB	5.00		HY17	1,376.				1,376.	963.		0.	963.
27	COMPUTER	11/11/02	200DB	5.00		HY17	1,842.				1,842.	1,289.		0.	1,289.
28	FURNITURE	03/10/03	200DB	7.00		HY17	1,750.				1,750.	1,750.		0.	1,750.
29	PROJECTOR	04/10/03	200DB	5.00		HY17	1,508.				1,508.	1,056.		0.	1,056.
30	EQUIPMENT (DSL INSTALLATION)	05/01/03	200DB	5.00		HY17	1,692.				1,692.	1,184.		0.	1,184.
31	EQUIPMENT (DSL INSTALLATION)	05/20/03	200DB	5.00		HY17	2,270.				2,270.	1,589.		0.	1,589.
32	EQUIPMENT (DSL INSTALLATION)	06/30/03	200DB	5.00		HY17	3,096.				3,096.	2,167.		0.	2,167.
33	COMPUTER NETWORK	08/31/03	SL	5.00		16	2,994.				2,994.	2,994.		0.	2,994.
34	COMPUTER NETWORK	09/24/03	SL	5.00		16	2,136.				2,136.	2,136.		0.	2,136.
35	COMPUTER EQUIPMENT	12/09/03	SL	5.00		16	1,402.				1,402.	1,402.		0.	1,402.
36	COMPUTER EQUIPMENT	03/31/10	SL	5.00		16	1,086.				1,086.	1,086.		0.	1,086.
37	LAPTOP	06/30/05	SL	5.00		16	3,119.				3,119.	3,119.		0.	3,119.
38	FURNITURE	09/30/05	SL	7.00		16	13,369.				13,369.	13,369.		0.	13,369.
39	COMPUTER EQUIPMENT	09/30/05	SL	5.00		16	1,044.				1,044.	992.		0.	992.
40	COMPUTER	11/30/05	SL	5.00		16	1,022.				1,022.	1,003.		0.	1,003.
41	COMPUTER	02/28/06	SL	5.00		16	3,702.				3,702.	3,702.		0.	3,702.

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
42	PRINTER	06/30/06	SL	5.00		16	3,882.				3,882.	3,882.		0.	3,882.
43	FILING SYSTEM	07/22/02	SL	7.00		16	2,627.				2,627.	2,627.		0.	2,627.
44	SOUND/VISUAL SYSTEM (CHAPEL)	02/12/07	SL	5.00		16	2,947.				2,947.	2,921.		0.	2,921.
45	SERVER (ACCOUNTING)	02/01/07	SL	5.00		16	20,156.				20,156.	19,988.		0.	19,988.
46	SOFTWARE UPGRADE (BLACKBAUD)	02/01/07	SL	5.00		16	3,780.				3,780.	3,749.		0.	3,749.
47	TRUCK	10/01/07	SL	5.00		16	1,153.				1,153.	1,153.		0.	1,153.
48	COMPUTER	01/31/08	SL	5.00		16	957.				957.	955.		0.	955.
49	COMPUTER	03/27/08	SL	5.00		16	581.				581.	580.		0.	580.
50	COPIER	04/12/08	SL	5.00		16	3,207.				3,207.	3,205.		0.	3,205.
51	COMPUTER	06/12/08	SL	5.00		16	771.				771.	770.		0.	770.
52	COMPUTER	02/19/09	SL	5.00		16	2,563.				2,563.	2,563.		0.	2,563.
53	BACK UP FOR COMPUTER	02/28/09	SL	5.00		16	89.				89.	89.		0.	89.
55	ARTIFACTS	07/01/99		.000		HY16	20,534.				20,534.			0.	
56	ARTIFACTS	10/10/00		.000		HY16	7,822.				7,822.			0.	
57	ARTIFACTS - BOOK COLLECTION	06/30/01		.000		HY16	1,200.				1,200.			0.	
58	ARTIFACTS	10/23/02		.000		HY16	10,164.				10,164.			0.	
60	ALLEY - CASA DE LA GUERRA	11/01/06	SL	15.00		16	44,990.				44,990.	28,866.		2,999.	31,865.
67	EQUIPMENT	08/11/09	SL	5.00		16	565.				565.	565.		0.	565.

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
68	COMPUTER EQUIPMENT & LABOR	01/31/10	SL	5.00		16	2,052.				2,052.	2,052.		0.	2,052.
69	IMAC	05/04/10	SL	5.00		16	1,320.				1,320.	1,320.		0.	1,320.
71	STORAGE YARD PROPERTY	12/15/08	L				85,000.				85,000.			0.	
72	LAND - PETERSEN PARCEL	02/28/11	L				1,112,500.				1,112,500.			0.	
75	IMPROVEMENTS - MILLS	05/31/11	SL	15.00		16	4,943.				4,943.	1,677.		330.	2,007.
76	TRACTOR	08/16/10	SL	5.00		16	19,862.				19,862.	19,862.		0.	19,862.
77	BUSH HOG	03/17/11	SL	5.00		16	2,475.				2,475.	2,475.		0.	2,475.
78	STORAGE YARD BUILDING	12/15/08	SL	39.00	MM	16	255,000.				255,000.	39,228.		6,538.	45,766.
81	COMPUTERS	03/29/12	SL	5.00		16	1,472.				1,472.	1,250.		222.	1,472.
82	COMPUTER - COMPUVISION	10/25/12	SL	5.00		16	1,380.				1,380.	1,012.		276.	1,288.
	RENTAL ASSETS			.000		HY16									
	G&A ASSETS			.000		HY16									
87	CASA IMPROVEMENTS	10/01/13	SL	15.00		16	10,082.				10,082.	1,848.		672.	2,520.
88	ANTIVIRUS SOFTWARE	01/28/14	SL	5.00		16	2,352.				2,352.	1,136.		470.	1,606.
89	MICROSOFT OFFICE 360	05/30/14	SL	5.00		16	6,855.				6,855.	2,856.		1,371.	4,227.
90	IMAC (2)	05/22/14	SL	5.00		16	1,941.				1,941.	808.		388.	1,196.
91	BACKUP SYSTEM	05/30/14	SL	5.00		16	3,201.				3,201.	1,333.		640.	1,973.
92	COMPUTERS - COMPUVISION	08/27/14	SL	5.00		16	7,779.				7,779.	2,853.		1,556.	4,409.

628111 04-01-16

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
93	PICK UP TRUCK - MISSION CITY	07/31/14	SL	5.00		16	9,680.				9,680.	3,711.		1,936.	5,647.
94	COMPUTER - LINDA ROSSO	10/30/14	SL	5.00		16	1,439.				1,439.	480.		288.	768.
95	ARTIFACTS - ART FROM GROVES	09/27/14		.000	HY	16	1,242.				1,242.			0.	
96	SERVER UPGRADES	12/28/15	SL	7.00		16	9,512.				9,512.	679.		1,359.	2,038.
97	COPIER	10/20/15	SL	5.00		16	945.				945.	126.		189.	315.
98	COMPUTER EQUIPMENT	11/30/15	SL	5.00		16	2,041.				2,041.	238.		408.	646.
99	AGRICULTURE EQUIPMENT	09/04/15	SL	5.00		16	1,500.				1,500.	250.		300.	550.
100	PIANO	06/30/16	SL	5.00		16	4,955.				4,955.			991.	991.
101	IRON SCALE	06/30/16	SL	5.00		16	250.				250.			50.	50.
102	ARTIFACTS	12/31/16		.000	HY	16	3,200.				3,200.			0.	
103	EQUIPMENT	12/31/16	SL	5.00		16	19,054.				19,054.			1,905.	1,905.
	* TOTAL 990 PAGE 10 DEPR						3,085,588.				3,085,588.	455,952.		32,718.	488,670.
	CURRENT YEAR ACTIVITY														
	BEGINNING BALANCE						3,063,334.			0.	3,063,334.	455,952.			486,765.
	ACQUISITIONS						22,254.			0.	22,254.	0.			1,905.
	DISPOSITIONS						0.			0.	0.	0.			0.
	ENDING BALANCE						3,085,588.			0.	3,085,588.	455,952.			488,670.

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
	ENDING ACCUM DEPR											488,670.			
	ENDING BOOK VALUE											2,596,918.			

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 .**

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, 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
File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. SANTA BARBARA TRUST FOR HISTORIC PRESERVATION	Employer identification number (EIN) or 95-6111696
	Number, street, and room or suite no. If a P.O. box, see instructions. 123 EAST CANON PERDIDO STREET	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SANTA BARBARA, CA 93101	

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

CAY SANCHEZ

• The books are in the care of ▶ **123 EAST CANON PERDIDO STREET - SANTA BARBARA, CA 93101**
Telephone No. ▶ **805-966-1279** 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 **MAY 15, 2018**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ calendar year _____ or
▶ tax year beginning **JUL 1, 2016**, and ending **JUN 30, 2017**.

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

3a 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.	3a	\$	0.
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.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	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.

California Exempt Organization
Annual Information Return

Calendar Year 2016 or fiscal year beginning (mm/dd/yyyy) 07/01/2016, and ending (mm/dd/yyyy) 06/30/2017

Corporation/Organization name SANTA BARBARA TRUST FOR HISTORIC PRESERVATION		California corporation number 0444573
Additional information. See instructions.		FEIN 95-6111696
Street address (suite or room) 123 EAST CANON PERDIDO STREET		PMB no.
City SANTA BARBARA	State CA	ZIP code 93101
Foreign country name	Foreign province/state/country	Foreign postal code

A First Return <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	J If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
B Amended Return <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	K Is the organization exempt under R&TC Section 23701g? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
C IRC Section 4947(a)(1) trust <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If "Yes," enter the gross receipts from nonmember sources \$ _____
D Final Information Return? <input type="checkbox"/> Dissolved <input type="checkbox"/> Surrendered (Withdrawn) <input type="checkbox"/> Merged/Reorganized Enter date: (mm/dd/yyyy) _____	L If organization is exempt under R&TC Section 23701d and meets the filing fee exception, check box. No filing fee is required. <input type="checkbox"/>
E Check accounting method: (1) <input type="checkbox"/> Cash (2) <input checked="" type="checkbox"/> Accrual (3) <input type="checkbox"/> Other	M Is the organization a Limited Liability Company? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
F Federal return filed? (1) <input type="checkbox"/> 990T (2) <input type="checkbox"/> 990-PF (3) <input type="checkbox"/> Sch H (990) (4) <input checked="" type="checkbox"/> Other 990 series	N Did the organization file Form 100 or Form 109 to report taxable income? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
G Is this a group filing? See instructions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	O Is the organization under audit by the IRS or has the IRS audited in a prior year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
H Is this organization in a group exemption <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," what is the parent's name?	P Is a federal Form 1023/1024 pending? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Date filed with IRS _____
I Did the organization have any changes to its guidelines not reported to the FTB? See instructions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Part I Complete Part I unless not required to file this form. See General Instructions B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8	1	3,992,159.00
	2	Gross dues and assessments from members and affiliates	2	24,880.00
	3	Gross contributions, gifts, grants, and similar amounts received STMT 1	3	511,590.00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$50,000, see General Instruction B STMT 3	4	4,528,629.00
	5	Cost of goods sold STMT 2	5	2,376.00
	6	Cost or other basis, and sales expenses of assets sold	6	2,652,427.00
	7	Total costs. Add line 5 and line 6	7	2,654,803.00
	8	Total gross income. Subtract line 7 from line 4	8	1,873,826.00
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18	9	1,284,273.00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8	10	589,553.00
Filing Fee	11	Total payments	11	00
	12	Use tax. See General Instruction K	12	00
	13	Payment balance. If line 11 is more than line 12, subtract line 12 from line 11	13	00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12	14	00
	15	Filing fee \$10 or \$25. See General Instruction F	15	10.00
	16	Penalties and Interest. See General Instruction J	16	00
	17	Balance due. Add line 12, line 15, and line 16. Then subtract line 11 from the result	17	10.00

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 taxpayer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer	Title PRESIDENT	Date	Telephone
	Preparer's signature		Date	PTIN P00161999
Paid Preparer's Use Only	Firm's name (or yours, if self-employed) and address ANIKOUCHINE & ASSOCIATES 7127 HOLLISTER AVE SUITE 25A-118 GOLETA, CA 93117	Telephone 81-4869549		
		Telephone 805-451-5430		

May the FTB discuss this return with the preparer shown above? See instructions Yes No

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

95-6111696

Part II Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.

628951 11-30-16

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions	•	1	131,355.00
	2	Interest	•	2	00
	3	Dividends	•	3	163,061.00
	4	Gross rents	•	4	266,457.00
	5	Gross royalties	•	5	00
	6	Gross amount received from sale of assets (See Instructions) STATEMENT 4	•	6	2,854,090.00
	7	Other income SEE STATEMENT 5	•	7	577,196.00
	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	•	8	3,992,159.00
	9	Contributions, gifts, grants, and similar amounts paid	•	9	00
	10	Disbursements to or for members	•	10	00
	11	Compensation of officers, directors, and trustees SEE STATEMENT 6	•	11	240,344.00
	12	Other salaries and wages	•	12	467,822.00
	13	Interest	•	13	2,810.00
	14	Taxes	•	14	12,491.00
	15	Rents	•	15	21,745.00
	16	Depreciation and depletion (See instructions)	•	16	32,718.00
	17	Other Expenses and Disbursements SEE STATEMENT 7	•	17	506,343.00
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	•	18	1,284,273.00

Schedule L Balance Sheet		Beginning of taxable year		End of taxable year	
		(a)	(b)	(c)	(d)
Assets					
1	Cash		186,588.		828,866.
2	Net accounts receivable				
3	Net notes receivable STMT 8		235,991.		226,438.
4	Inventories		27,715.		34,146.
5	Federal and state government obligations				
6	Investments in other bonds				
7	Investments in stock				
8	Mortgage loans				
9	Other investments STMT 9		5,907,413.		6,025,169.
10 a	Depreciable assets STMT 14	3,063,334.		1,093,853.	
b	Less accumulated depreciation	(455,952.)	2,607,382.	(488,670.)	605,183.
11	Land				1,991,735.
12	Other assets STMT 10		186,821.		214,038.
13	Total assets		9,151,910.		9,925,575.
Liabilities and net worth					
14	Accounts payable		71,114.		14,993.
15	Contributions, gifts, or grants payable				
16	Bonds and notes payable				
17	Mortgages payable				
18	Other liabilities STMT 11		29,428.		40,428.
19	Capital stock or principal fund				
20	Paid-in or capital surplus. Attach reconciliation				
21	Retained earnings or income fund		9,051,368.		9,870,154.
22	Total liabilities and net worth		9,151,910.		9,925,575.

Schedule M-1 Reconciliation of income per books with income per return			
Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000.			
1	Net income per books	•	818,786.
2	Federal income tax	•	
3	Excess of capital losses over capital gains	•	
4	Income not recorded on books this year	•	
5	Expenses recorded on books this year not deducted in this return	•	
6	Total. Add line 1 through line 5		818,786.
7	Income recorded on books this year not included in this return. STMT 12	•	229,233.
8	Deductions in this return not charged against book income this year	•	
9	Total. Add line 7 and line 8		229,233.
10	Net income per return. Subtract line 9 from line 6		589,553.

FORM 199

CASH CONTRIBUTIONS
INCLUDED ON PART I, LINE 3

STATEMENT 1

CONTRIBUTOR'S NAME	CONTRIBUTOR'S ADDRESS	DATE OF GIFT	AMOUNT
GRIFFITHS CHARITABLE TRUST	P.O. BOX 2340 SANTA BARBARA, CA 93120	11/28/16	15,000.
HUTTON PARKER FOUNDATION	26 WEST ANAPAMU STREET, 4TH FLOOR SANTA BARBARA, CA 93101	12/20/16	50,000.
JOHN & BEVERLEY STAUFFER FOUNDATION	333 SOUTH HOPE STREET, 48TH FLOOR LOS ANGELES, CA 90071	02/27/17	5,000.
MONTECITO BANK & TRUST	1010 STATE STREET SANTA BARBARA, CA 93101	11/21/16	5,000.
OUTHWAITE CHARITABLE TRUST	26 WEST ANAPAMU STREET, STE 103 SANTA BARBARA, CA 93101	12/20/16	50,000.
THE TOWBES FOUNDATION	P.O. BOX 20130 SANTA BARBARA, CA 93120	11/28/16	10,000.
VIRGINIA RIDDER	3101 THAELL RD RYE, NY 10580	04/11/17	300,238.
BOB TULER	205 E CARRILLO ST., STE 100 SANTA BARBARA, CA 93101	10/03/16	10,000.
IVANO PAOLO VIT	419 E ARRELLAGA ST. #A SANTA BARBARA, CA 93101	05/31/17	12,000.
TOTAL INCLUDED ON LINE 3			457,238.

FORM 199

COST OF GOODS SOLD
INCLUDED ON PART I, LINE 5

STATEMENT 2

COST OF GOODS SOLD

1. INVENTORY AT BEGINNING OF YEAR		
2. MERCHANDISE PURCHASED.	2,376	
3. COST OF LABOR.		
4. MATERIALS AND SUPPLIES		
5. OTHER COSTS.		
6. ADD LINES 1 THROUGH 5		2,376
7. INVENTORY AT END OF YEAR		
8. COST OF GOODS SOLD (LINE 6 LESS LINE 7) . .		2,376

FORM 199

NONCASH CONTRIBUTIONS
INCLUDED ON PART I, LINE 3

STATEMENT 3

CONTRIBUTOR'S NAMECONTRIBUTOR'S ADDRESS

BALMASEDA WINERY

P.O. BOX 914 VENTURA, CA 93001

PROPERTY DESCRIPTIONDATE OF GIFTTOTAL AMOUNTFMV OF GIFT

CASES OF WINE

05/31/17

5,400.

5,400.

TOTAL INCLUDED ON LINE 3

5,400.

FORM 199 GROSS AMOUNT FROM SALE OF ASSETS STATEMENT 4

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED	
			PURCHASED	
	COST OR OTHER BASIS	DEPREC.	EXPENSE OF SALE	GROSS SALES PRICE
	2,652,427.	0.	0.	2,854,090.
TOTAL TO FORM 199, PAGE 2, LN 6	2,652,427.	0.	0.	2,854,090.

FORM 199 OTHER INCOME STATEMENT 5

DESCRIPTION	AMOUNT
REIMBURSED PAYROLL COSTS	557,936.
OTHER INCOME	15,575.
ADMISSIONS	3,685.
TOTAL TO FORM 199, PART II, LINE 7	577,196.

 FORM 199 COMPENSATION OF OFFICERS, DIRECTORS AND TRUSTEES STATEMENT 6

NAME AND ADDRESS	TITLE AND AVERAGE HRS WORKED/WK	COMPENSATION
CRAIG MAKELA 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 6.50	0.
ARTHUR NAJERA 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
KATIE HAY 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
TIMOTHY AGUILAR 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
W. ELLIOT BROWNLEE 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	TREASURER 3.00	0.
DOUGLAS CAMPBELL 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
RANDY BERGSTROM 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
ROB ROSSI 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
DONALD G. SHARPE 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
KEITH J. MAUTINO 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 5.00	0.
ROBERT TULER 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 2.00	0.

MICHAEL ARNOLD 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
JAMES BROOKS 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
DEBBY ACEVES 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	FIRST VICE PRESIDENT 2017 3.00	0.
MAGGIE CAMPBELL 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	SECOND VICE PRESIDENT 3.00	0.
JOHN POUCHER 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	IMMEDIATE PAST PRESIDENT 3.00	0.
TEREASE CHIN 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	PRESIDENT 3.00	0.
SUZANNE SCHOMER 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	FIRST VICE PRESIDENT 2016 3.00	0.
MARY LOUISE DAYS 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 6.00	0.
KEVIN NIMMONS 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 3.00	0.
WAYNE NATALE 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
KEVIN SNOW 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
LESLIE ZOMALT 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.
ANTHONY GRUMBINE 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	BOARD MEMBER 1.00	0.

ANNE PETERSEN 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	EXECUTIVE DIRECTOR 50.00	100,094.
JARREL C. JACKMAN 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	PRIOR EXECUTIVE DIRECTOR 50.00	63,158.
SALLY FOUHSE 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	CFO, BEGINNING 50.00	72,561.
JACKIE ALARCON 123 EAST CANON PERDIDO STREET SANTA BARBARA, CA 93101	CFO, END OF YEAR 30.00	4,531.
TOTAL TO FORM 199, PART II, LINE 11		<u>240,344.</u>

FORM 199	OTHER EXPENSES	STATEMENT	7
----------	----------------	-----------	---

DESCRIPTION	AMOUNT
PROGRAM SUPPLIES	13,760.
REPAIRS & MAINTENANCE	13,096.
LEASED EQUIPMENT	7,632.
RENTAL EXPENSES	22,021.
DIRECT EXPENSES OF FUNDRAISING EVENTS	49,057.
OTHER EMPLOYEE BENEFITS	1,618.
LEGAL FEES	5,829.
ACCOUNTING FEES	20,400.
PROFESSIONAL FUNDRAISING FEES	12,598.
INVESTMENT MANAGEMENT FEES	52,392.
OTHER PROFESSIONAL FEES	195,364.
ADVERTISING AND PROMOTION	6,923.
OFFICE EXPENSES	74,073.
TRAVEL	4,155.
INSURANCE	27,425.
TOTAL TO FORM 199, PART II, LINE 17	<u>506,343.</u>

FORM 199	NET NOTES RECEIVABLE	STATEMENT	8
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
NOTES AND LOANS RECEIVABLE, NET	235,991.	226,438.	
TOTAL TO FORM 199, SCHEDULE L, LINE 3	235,991.	226,438.	

FORM 199	OTHER INVESTMENTS	STATEMENT	9
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
OTHER PUBLICLY TRADED SECURITIES	5,907,413.	6,025,169.	
TOTAL TO FORM 199, SCHEDULE L, LINE 9	5,907,413.	6,025,169.	

FORM 199	OTHER ASSETS	STATEMENT	10
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
PLEDGES AND GRANTS RECEIVABLE	0.	6,000.	
PREPAID EXPENSES AND DEFERRED CHARGES	2,666.	2,804.	
CONTRIBUTIONS RECEIVABLE FROM CRT	77,061.	84,573.	
OTHER RECEIVABLES	85,628.	98,510.	
LIFE INSURANCE RECEIVABLE	21,466.	22,151.	
TOTAL TO FORM 199, SCHEDULE L, LINE 12	186,821.	214,038.	

FORM 199	OTHER LIABILITIES	STATEMENT	11
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
DEPOSITS	29,428.	15,428.	
UNSECURED NOTES AND LOANS PAYABLE	0.	25,000.	
TOTAL TO FORM 199, SCHEDULE L, LINE 18	29,428.	40,428.	

FORM 199	INCOME RECORDED ON BOOKS THIS YEAR NOT INCLUDED IN THIS RETURN	STATEMENT 12
----------	---	--------------

DESCRIPTION	AMOUNT
NET UNREALIZED GAIN ON INVESTMENTS	221,721.
CHANGE IN CRT	7,512.
TOTAL TO FORM 199, SCHEDULE M-1, LINE 7	229,233.

FORM 199	FUND BALANCES	STATEMENT 13
----------	---------------	--------------

DESCRIPTION	BEG. OF YEAR	END OF YEAR
UNRESTRICTED ASSETS	1,831,340.	2,658,682.
TEMPORARILY RESTRICTED ASSETS	6,506,028.	6,493,274.
PERMANENTLY RESTRICTED ASSETS	714,000.	718,198.
TOTAL TO FORM 199, SCHEDULE L, LINE 21	9,051,368.	9,870,154.

FORM 199	DEPRECIABLE ASSETS	STATEMENT 14
----------	--------------------	--------------

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	END OF YEAR BOOK VALUE
BLDG - CASA DE LA GUERRA BUILDING-JIMMY'S ORIENTAL GARDENS (1/3)	125,291.	125,291.	0.
OFFICE FURNITURE	87.	87.	0.
FILE CABINET	201.	201.	0.
ALARM	245.	245.	0.
COMPUTER FUND	1,976.	1,976.	0.
COMPUTER SOFTWARE	5,000.	5,000.	0.
1992 FORD	8,512.	8,512.	0.
COMPUTER	1,679.	1,679.	0.
FURNITURE-STANDS	2,000.	2,000.	0.
FURNITURE	3,000.	3,000.	0.
COMPUTER	2,889.	2,889.	0.
FURNITURE	1,646.	1,646.	0.
EQUIPMENT	8,168.	8,168.	0.
FURNITURE	1,708.	1,708.	0.
COMPUTER - ARCH LAB	983.	983.	0.
COMPUTER - CURATORIAL	1,170.	1,170.	0.
COMPUTER	1,376.	963.	413.
COMPUTER	1,842.	1,289.	553.
FURNITURE	1,750.	1,750.	0.

PROJECTOR	1,508.	1,056.	452.
EQUIPMENT (DSL INSTALLATION)	1,692.	1,184.	508.
EQUIPMENT (DSL INSTALLATION)	2,270.	1,589.	681.
EQUIPMENT (DSL INSTALLATION)	3,096.	2,167.	929.
COMPUTER NETWORK	2,994.	2,994.	0.
COMPUTER NETWORK	2,136.	2,136.	0.
COMPUTER EQUIPMENT	1,402.	1,402.	0.
COMPUTER EQUIPMENT	1,086.	1,086.	0.
LAPTOP	3,119.	3,119.	0.
FURNITURE	13,369.	13,369.	0.
COMPUTER EQUIPMENT	1,044.	992.	52.
COMPUTER	1,022.	1,003.	19.
COMPUTER	3,702.	3,702.	0.
PRINTER	3,882.	3,882.	0.
FILING SYSTEM	2,627.	2,627.	0.
SOUND/VISUAL SYSTEM (CHAPEL)	2,947.	2,921.	26.
SERVER (ACCOUNTING)	20,156.	19,988.	168.
SOFTWARE UPGRADE (BLACKBAUD)	3,780.	3,749.	31.
TRUCK	1,153.	1,153.	0.
COMPUTER	957.	955.	2.
COMPUTER	581.	580.	1.
COPIER	3,207.	3,205.	2.
COMPUTER	771.	770.	1.
COMPUTER	2,563.	2,563.	0.
BACK UP FOR COMPUTER	89.	89.	0.
ARTIFACTS	20,534.	0.	20,534.
ARTIFACTS	7,822.	0.	7,822.
ARTIFACTS - BOOK COLLECTION	1,200.	0.	1,200.
ARTIFACTS	10,164.	0.	10,164.
ALLEY - CASA DE LA GUERRA	44,990.	31,865.	13,125.
EQUIPMENT	565.	565.	0.
COMPUTER EQUIPMENT & LABOR	2,052.	2,052.	0.
IMAC	1,320.	1,320.	0.
IMPROVEMENTS - MILLS	4,943.	2,007.	2,936.
TRACTOR	19,862.	19,862.	0.
BUSH HOG	2,475.	2,475.	0.
STORAGE YARD BUILDING	255,000.	45,766.	209,234.
COMPUTERS	1,472.	1,472.	0.
COMPUTER - COMPUVISION	1,380.	1,288.	92.
CASA IMPROVEMENTS	10,082.	2,520.	7,562.
ANTIVIRUS SOFTWARE	2,352.	1,606.	746.
MICROSOFT OFFICE 360	6,855.	4,227.	2,628.
IMAC (2)	1,941.	1,196.	745.
BACKUP SYSTEM	3,201.	1,973.	1,228.
COMPUTERS - COMPUVISION	7,779.	4,409.	3,370.
PICK UP TRUCK - MISSION CITY	9,680.	5,647.	4,033.
COMPUTER - LINDA ROSSO	1,439.	768.	671.
ARTIFACTS - ART FROM GROVES	1,242.	0.	1,242.
SERVER UPGRADES	9,512.	2,038.	7,474.
COPIER	945.	315.	630.
COMPUTER EQUIPMENT	2,041.	646.	1,395.
AGRICULTURE EQUIPMENT	1,500.	550.	950.
PIANO	4,955.	991.	3,964.
IRON SCALE	250.	50.	200.

SANTA BARBARA TRUST FOR HISTORIC PRESERV

95-6111696

ARTIFACTS	3,200.	0.	3,200.
EQUIPMENT	19,054.	1,905.	17,149.
TOTAL TO FORM 199, SCH L, LINE 10	1,093,853.	488,670.	605,183.

Corporation Depreciation and Amortization

Attach to Form 100 or Form 100W.

FORM 199

FEIN 95-6111696

Corporation name

SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

California corporation number

0444573

Part I Election To Expense Certain Property Under IRC Section 179

1	Maximum deduction under IRC Section 179 for California	1	\$25,000
2	Total cost of IRC Section 179 property placed in service	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost)	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from prior taxable years	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2017. Add line 9 and line 10, less line 12	13	

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

(a) Description property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation Method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
14							
SEE STATEMENT	15	3,085,588.	455,952.				
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h)					15	32,718.

Part III Summary

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g); or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h), or Depreciation (if no election is made), enter the amount from line 15, column (g)	16	32,718.
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22	17	32,718.
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.)	18	0.

Part IV Amortization

(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instructions)	(f) Period or percentage	(g) Amortization for this year	
19							
20	Total. Add the amounts in column (g)					20	
21	Total amortization claimed for federal purposes from federal Form 4562, line 44					21	
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12					22	

CA 3885		DEPRECIATION				STATEMENT 15	
ASSET NO./ DESCRIPTION	DATE IN SERVICE	COST OR BASIS	PRIOR DEPR	METHOD	LIFE	DEPRE- CIATION	BONUS
2 LAND - CASA DE LA GUERRA	03/31/07	58,735.		L		0.	
3 LAND - DE LA GUERRA COMPLEX	03/01/07	125,000.		L		0.	
6 LAND- JIMMY'S ORIENTAL GARDENS	03/31/07	610,500.		L		0.	
8 BLDG - CASA DE LA GUERRA	06/01/72	125,291.	125,291.	SL	35.00	0.	
9 BUILDING-JIMMY'S ORIENTAL GARDENS (1/3)	03/31/07	383,370.	94,489.	SL	39.00	9,830.	
11 OFFICE FURNITURE	06/07/73	87.	87.	SL	7.00	0.	
12 FILE CABINET	05/01/85	201.	201.	SL	7.00	0.	
13 ALARM	08/24/89	245.	245.	200DB	5.00	0.	
14 COMPUTER FUND	09/15/97	1,976.	1,976.	200DB	5.00	0.	
15 COMPUTER SOFTWARE	09/15/97	5,000.	5,000.	SL	3.00	0.	
16 1992 FORD	07/02/92	8,512.	8,512.	200DB	5.00	0.	
17 COMPUTER	04/26/00	1,679.	1,679.	200DB	5.00	0.	
18 FURNITURE-STANDS	05/31/00	2,000.	2,000.	200DB	7.00	0.	
19 FURNITURE	08/31/00	3,000.	3,000.	200DB	7.00	0.	
20 COMPUTER	10/26/00	2,889.	2,889.	200DB	5.00	0.	
21 FURNITURE	10/31/00	1,646.	1,646.	200DB	7.00	0.	
22 EQUIPMENT	02/21/01	8,168.	8,168.	200DB	7.00	0.	
23 FURNITURE	07/31/01	1,708.	1,708.	200DB	7.00	0.	
24 COMPUTER - ARCH LAB	09/18/01	983.	983.	200DB	5.00	0.	
25 COMPUTER - CURATORIAL	12/10/01	1,170.	1,170.	200DB	5.00	0.	
26 COMPUTER	09/10/02	1,376.	963.	200DB	5.00	0.	
27 COMPUTER	11/11/02	1,842.	1,289.	200DB	5.00	0.	
28 FURNITURE	03/10/03	1,750.	1,750.	200DB	7.00	0.	

29	PROJECTOR	04/10/03	1,508.	1,056.	200DB	5.00	0.
30	EQUIPMENT (DSL INSTALLATION)	05/01/03	1,692.	1,184.	200DB	5.00	0.
31	EQUIPMENT (DSL INSTALLATION)	05/20/03	2,270.	1,589.	200DB	5.00	0.
32	EQUIPMENT (DSL INSTALLATION)	06/30/03	3,096.	2,167.	200DB	5.00	0.
33	COMPUTER NETWORK	08/31/03	2,994.	2,994.	SL	5.00	0.
34	COMPUTER NETWORK	09/24/03	2,136.	2,136.	SL	5.00	0.
35	COMPUTER EQUIPMENT	12/09/03	1,402.	1,402.	SL	5.00	0.
36	COMPUTER EQUIPMENT	03/31/10	1,086.	1,086.	SL	5.00	0.
37	LAPTOP	06/30/05	3,119.	3,119.	SL	5.00	0.
38	FURNITURE	09/30/05	13,369.	13,369.	SL	7.00	0.
39	COMPUTER EQUIPMENT	09/30/05	1,044.	992.	SL	5.00	0.
40	COMPUTER	11/30/05	1,022.	1,003.	SL	5.00	0.
41	COMPUTER	02/28/06	3,702.	3,702.	SL	5.00	0.
42	PRINTER	06/30/06	3,882.	3,882.	SL	5.00	0.
43	FILING SYSTEM	07/22/02	2,627.	2,627.	SL	7.00	0.
44	SOUND/VISUAL SYSTEM (CHAPEL)	02/12/07	2,947.	2,921.	SL	5.00	0.
45	SERVER (ACCOUNTING)	02/01/07	20,156.	19,988.	SL	5.00	0.
46	SOFTWARE UPGRADE (BLACKBAUD)	02/01/07	3,780.	3,749.	SL	5.00	0.
47	TRUCK	10/01/07	1,153.	1,153.	SL	5.00	0.
48	COMPUTER	01/31/08	957.	955.	SL	5.00	0.
49	COMPUTER	03/27/08	581.	580.	SL	5.00	0.
50	COPIER	04/12/08	3,207.	3,205.	SL	5.00	0.
51	COMPUTER	06/12/08	771.	770.	SL	5.00	0.
52	COMPUTER	02/19/09	2,563.	2,563.	SL	5.00	0.
53	BACK UP FOR COMPUTER	02/28/09	89.	89.	SL	5.00	0.
55	ARTIFACTS	07/01/99	20,534.			.000	0.
56	ARTIFACTS	10/10/00	7,822.			.000	0.

57	ARTIFACTS - BOOK COLLECTION						
	06/30/01	1,200.			.000		0.
58	ARTIFACTS						
	10/23/02	10,164.			.000		0.
60	ALLEY - CASA DE LA GUERRA						
	11/01/06	44,990.	28,866.	SL	15.00		2,999.
67	EQUIPMENT						
	08/11/09	565.	565.	SL	5.00		0.
68	COMPUTER EQUIPMENT & LABOR						
	01/31/10	2,052.	2,052.	SL	5.00		0.
69	IMAC						
	05/04/10	1,320.	1,320.	SL	5.00		0.
71	STORAGE YARD PROPERTY						
	12/15/08	85,000.		L			0.
72	LAND - PETERSEN PARCEL						
	02/28/11	1,112,500.		L			0.
75	IMPROVEMENTS - MILLS						
	05/31/11	4,943.	1,677.	SL	15.00		330.
76	TRACTOR						
	08/16/10	19,862.	19,862.	SL	5.00		0.
77	BUSH HOG						
	03/17/11	2,475.	2,475.	SL	5.00		0.
78	STORAGE YARD BUILDING						
	12/15/08	255,000.	39,228.	SL	39.00		6,538.
81	COMPUTERS						
	03/29/12	1,472.	1,250.	SL	5.00		222.
82	COMPUTER - COMPUVISION						
	10/25/12	1,380.	1,012.	SL	5.00		276.
87	CASA IMPROVEMENTS						
	10/01/13	10,082.	1,848.	SL	15.00		672.
88	ANTIVIRUS SOFTWARE						
	01/28/14	2,352.	1,136.	SL	5.00		470.
89	MICROSOFT OFFICE 360						
	05/30/14	6,855.	2,856.	SL	5.00		1,371.
90	IMAC (2)						
	05/22/14	1,941.	808.	SL	5.00		388.
91	BACKUP SYSTEM						
	05/30/14	3,201.	1,333.	SL	5.00		640.
92	COMPUTERS - COMPUVISION						
	08/27/14	7,779.	2,853.	SL	5.00		1,556.
93	PICK UP TRUCK - MISSION CITY						
	07/31/14	9,680.	3,711.	SL	5.00		1,936.
94	COMPUTER - LINDA ROSSO						
	10/30/14	1,439.	480.	SL	5.00		288.
95	ARTIFACTS - ART FROM GROVES						
	09/27/14	1,242.			.000		0.
96	SERVER UPGRADES						
	12/28/15	9,512.	679.	SL	7.00		1,359.
97	COPIER						
	10/20/15	945.	126.	SL	5.00		189.
98	COMPUTER EQUIPMENT						
	11/30/15	2,041.	238.	SL	5.00		408.
99	AGRICULTURE EQUIPMENT						
	09/04/15	1,500.	250.	SL	5.00		300.

SANTA BARBARA TRUST FOR HISTORIC PRESERV

95-6111696

100 PIANO	06/30/16	4,955.	SL	5.00	991.
101 IRON SCALE	06/30/16	250.	SL	5.00	50.
102 ARTIFACTS	12/31/16	3,200.		.000	0.
103 EQUIPMENT	12/31/16	19,054.	SL	5.00	1,905.
TOTAL DEPR TO FORM 3885		<u>3,085,588.</u>	<u>455,952.</u>		<u>32,718.</u>

MAIL TO:
 Registry of Charitable Trusts
 P.O. Box 903447
 Sacramento, CA 94203-4470
 Telephone: (916) 445-2021

WEB SITE ADDRESS:
<http://ag.ca.gov/charities/>

**ANNUAL
 REGISTRATION RENEWAL FEE REPORT
 TO ATTORNEY GENERAL OF CALIFORNIA**

Sections 12586 and 12587, California Government Code
 11 Cal. Code Regs. sections 301-307, 311 and 312

Failure to submit this report annually no later than four months and fifteen days after the end of the organization's accounting period may result in the loss of tax exemption and the assessment of a minimum tax of \$800, plus interest, and/or fines or filing penalties as defined in Government Code section 12586.1. IRS extensions will be honored.

State Charity Registration Number: CT 004732 SANTA BARBARA TRUST FOR HISTORIC PRESERVATION <small>Name of Organization</small> 123 EAST CANON PERDIDO STREET <small>Address (Number and Street)</small> SANTA BARBARA, CA 93101 <small>City or Town, State and ZIP Code</small>	Check if: <input type="checkbox"/> Change of address <input type="checkbox"/> Amended report Corporate or Organization No. <u>0444573</u> Federal Employer I.D. No. <u>95-6111696</u>
---	--

ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311 and 312)
 Make Check Payable to Attorney General's Registry of Charitable Trusts

Gross Annual Revenue	Fee	Gross Annual Revenue	Fee	Gross Annual Revenue	Fee
Less than \$25,000	0	Between \$100,001 and \$250,000	\$50	Between \$1,000,001 and \$10 million	\$150
Between \$25,000 and \$100,000	\$25	Between \$250,001 and \$1 million	\$75	Between \$10,000,001 and \$50 million	\$225
				Greater than \$50 million	\$300

PART A - ACTIVITIES

For your most recent full accounting period (beginning 07/01/2016 ending 06/30/2017) list:
 Gross annual revenue \$ 1,802,748. Total assets \$ 9,925,575.

PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: If you answer "yes" to any of the questions below, you must attach a separate sheet providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

	Yes	No
1. During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof either directly or with an entity in which any such officer, director or trustee had any financial interest? SEE STATEMENT 16	X	
2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds?		X
3. During this reporting period, did non-program expenditures exceed 50% of gross revenues?		X
4. During this reporting period, were any organization funds used to pay any penalty, fine or judgment? If you filed a Form 4720 with the Internal Revenue Service, attach a copy.		X
5. During this reporting period, were the services of a commercial fundraiser or fundraising counsel for charitable purposes used? If "yes," provide an attachment listing the name, address, and telephone number of the service provider. STMT 17	X	
6. During this reporting period, did the organization receive any governmental funding? If so, provide an attachment listing the name of the agency, mailing address, contact person, and telephone number.		X
7. During this reporting period, did the organization hold a raffle for charitable purposes? If "yes," provide an attachment indicating the number of raffles and the date(s) they occurred.		X
8. Does the organization conduct a vehicle donation program? If "yes," provide an attachment indicating whether the program is operated by the charity or whether the organization contracts with a commercial fundraiser for charitable purposes.		X
9. Did your organization have prepared an audited financial statement in accordance with generally accepted accounting principles for this reporting period?		X

Organization's area code and telephone number 805-966-1279

Organization's e-mail address _____

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, it is true, correct and complete.

DEBBY ACEVES

PRESIDENT

Signature of authorized officer

Printed Name

Title

Date

FORM RRF-1

EXPLANATION OF FINANCIAL TRANSACTIONS
PART B, LINE 1

STATEMENT 16

A MEMBER OF THE ORGANIZATION'S BOARD OF TRUSTEES IS A RETIRED PARTNER IN A LAW FIRM IN THE ORGANIZATION'S PRIMARY LEGAL FIRM. ANOTHER BOARD MEMBER IS EMPLOYED BY THE SAME FIRM.

TWO MEMBERS OF THE ORGANIZATION'S BOARD OF TRUSTEES ARE VICE-PRESIDENTS OF ONE OF THE BANKS WHERE THE TRUST HAS INVESTMENTS.

A MEMBER OF THE BOARD OF TRUSTEES IS AN EXECUTIVE DIRECTOR OF DOWNTOWN SANTA BARBARA TO WHICH THE TRUST PAYS DUES AND REIMBURSED THE ORGANIZATION FOR MEETING EXPENSES.

A MEMBER OF THE BOARD OF TRUSTEES WAS PAID FOR THE BOTTLING OF OLIVE OIL FROM THE ORGANIZATION'S TREES.

A MEMBER OF THE BOARD OF TRUSTEES IS A PRINCIPAL ARCHITECT AT A FIRM USED BY THE ORGANIZATION FOR ARCHITECTURAL PLANS AND PROJECT OVERSIGHT.

SEE FORM 990, SCHEDULE L PART IV FOR MORE DETAILS.

FORM RRF-1

INFORMATION REGARDING PROFESSIONAL
FUND-RAISING SERVICES
PART B, LINE 5

STATEMENT 17

ROBERT HOWRY
326 VISTA PACIFICA
SANTA BARBARA, CA 93109