

USDC SCAN INDEX SHEET



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3:04-CV-02184 USA V. GUESS

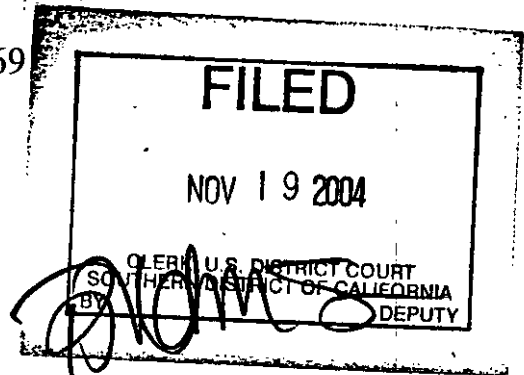
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DECL.

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10
11 UNITED STATES DISTRICT COURT
12 SOUTHERN DISTRICT OF CALIFORNIA
13

14 UNITED STATES OF AMERICA,

15 Plaintiff,

16 v.

17 L. DONALD GUESS, et al.,

18 Defendant.
19

Case No. 04-CV-2184 LAB (AJB)

**DECLARATION OF SHERYL
WAKEFIELD IN SUPPORT OF:**

**RESPONSE OF XELAN
FOUNDATION, INC. TO ORDER
TO SHOW CAUSE**

Judge: The Honorable Larry A. Burns
Date: December 3, 2004
Time: 1:30 p.m.

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DECLARATION OF SHERYL WAKEFIELD

1. My name is Sheryl Wakefield. I am over the age of 18 years, and a resident of San Diego, California.
2. I have worked for the xélan, Foundation, Inc. ("the Foundation") since June 30, 2003.
3. I am the Foundation's Administrator. My duties include maintaining and overseeing all of the Foundation's accounts.
4. I have personal knowledge of the books and records, including accounting records, which the Foundation maintains on a daily, monthly, and annual basis.
5. The Foundation has a primary bank account with Torrey Pines Bank, which is the Foundation's operating account. (Prior to the Torrey Pines Bank account, the Foundation's operating account was with The First National Bank. That account is now closed.)
6. The sources of the deposits into the operating account are many: All cash contributions received by donors are deposited into this account. If a donor wants a contribution made to a charity (and such contribution is approved by the Foundation), it is made by check from this account payable to the organization. If donated monies are not distributed to a charity upon donation, the funds are deposited into the Foundation's SEI account for investment or another investment such as an annuity. When the Foundation determines to contribute to a charity, usually at the request of the donor, money is withdrawn from SEI, or wherever they are invested, and re-deposited into the bank account, and, in turn, the contribution is made from this account.
7. Another source of deposits in the operating account is proceeds from donated securities. Donated securities are liquidated, deposited into the operating account, and then distributed to a charity. Another source of deposits is annuity payments made to donors, as part of charitable remainder annuity trust, which are deposited into the account from the institution that pays the annuity. If a donor wants to close his/her donor advised fund, it is transferred to another organization similar to the Foundation, or to another 501(c)(3) charity, via the operating account. Other deposited monies include the initial and yearly renewal fees paid by donors, and some monies for the defense fund (described below).
8. I have reviewed the SMART database program maintained by the Foundation and various reports printed from the same.
9. Based on this review, I believe the Foundation currently has approximately \$44 million in net assets. A large portion of the Foundation's assets, approximately \$23 million, are invested in securities

currently maintained in one account, owned by the Foundation, with SEI, for future charitable distributions. Funds set aside, currently around \$2.5 million, for the legal defense costs, are maintained in one account (also owned by the Foundation) with Schwab. Other assets include: approximately: \$1 million in another Schwab account; \$780,000 in other brokerage accounts; \$1.8 million in Viaticals; \$10.3 million in gift annuities; \$3.1 million in student loans; \$6.7 in non-cash/non-security assets; \$355,000 in notes receivables.

10. The current liabilities of the Foundation include: deferred gift annuity obligations; bank overdrafts; deferred compensation obligations.
11. Since the Foundation began, it has distributed charitable contributions totaling approximately \$11 million to hundreds of different charities including, but not limited to: Brown University, St. Mary's Hospital, Boys & Girls Club, Creighton University, Boy Scouts of America, Medical College of VA, Leukemia & Lymphoma Society, Duke University Medical Center, Food for the Poor, Inc., Cornell University, Juvenile Diabetes Research Foundation, American Academy of Otolaryngology, and Campus Crusade for Christ.
12. The only non-charitable expenditures/disbursements I am aware of are those to pay for necessary management costs (approximately 6% of all contributions), and reasonable attorneys' fees and costs.
13. Zero to six-percent of all contributions were paid (up until several months ago) to xélan, Inc. or xélan Investment Services, Inc. to cover marketing and research expenses of the Foundation.
14. An annualized 1.1% of all managed funds (i.e., donations invested in securities) were paid on a quarterly basis to xélan Investment Services, Inc. (up until several months ago), for the management of the invested funds.
15. Ten percent (10%) of the Foundation's total assets are used to pay attorneys and accountants for legal and accounting fees and costs relating to the IRS examination of the Foundation, the IRS' proposed revocation of tax-exempt status, and the IRS examinations of Foundation donors. These funds are located in the Foundation's account at Schwab.
16. I believe that the marketing and research fee, legal fees, as well as the investment management fee, are all disclosed to Foundation donors by their financial counselors.
17. I am not aware of any monies being paid directly from the Foundation to Dr. Guess.
18. Donors have the ability to establish a donor advised fund. If so, they must complete an application, providing the following: desired name for the donor advised fund; fund advisor's identification information (date of

birth, social security number, address, and telephone numbers); type of funding; proposed charitable purpose(s); and successor donor advisement information. Attached as Exhibit A, is a copy of an Application to Establish a Donor Advised Fund. I review all applications, and make a preliminary determination. When Dr. Guess was a Board member, I would forward the application to Dr. Guess for approval and consideration by the Foundation's Board.

19. Being a donor advised fund, donors can suggest the recipient or use of the charitable contribution. He/she may suggest as a donee another not-for-profit organization, or a local charitable activity known to the donor. However, the Foundation's Board has the ultimate authority to determine whether the funds will be donated to the suggested charity or purpose.
20. Some of the many different charitable purposes of donor advised funds are the following: to provide free medical care for homeless people, who are sheltered at Salvation Army Facilities in L.A. County area; to support the school and health facility in Nicaragua's Madre Paula's Project; to establish a scholarship at the Universidad Nacional Autonoma De Nicaragua, and a teaching program on health and law in Nicaragua; to help the project Music School for Disadvantaged Children in Leon-Nicaragua; and to provide medical services to American and foreign children affected by physical disfigurements resulting from congenital birth defects.
21. At the time the application is submitted, the donor usually donates money or property to be distributed to the donor advised account. There is a set-up fee of \$1,400.
22. Donors can contribute money, tangible property, or real property.
23. Upon receiving a contribution, the Foundation provides a receipt of the donation to the donor. An example of a receipt of a donation is attached as Exhibit B. The receipt confirms the donation and explains that the Foundation is a tax-exempt public foundation, and no goods or services were provided for the donation. The receipt also reminds the donor that the contribution must be a complete and unrestricted gift.
24. For every request for a distribution to a charity, the donor must submit a Distribution Request Form or by providing other adequate, written request, such as a letter to the Foundation requesting a distribution be made to a certain charity. A copy of Distribution Request Form is attached as Exhibit C.
25. Upon receipt of a Distribution Request Form, I review it and make a preliminary determination as to whether the distribution is for a bona fide charitable purpose and the recipient is a valid charity registered with the IRS. If the recipient is not listed in IRS Publication 78, it must provide

the Foundation a copy of their IRS determination letter evidencing tax-exempt charitable status. The Foundation on several occasions has denied Distribution Requests.

26. Donors can develop their own charitable project that is funded by their donor advised fund, provided the project furthers the charitable purposes of the Foundation and is approved by the Foundation. The donor can provide services to his/her charitable project, and receive reasonable compensation for the services. The donor's expenses can also be funded by the donor's donor advised fund. Only some donors request reimbursement of expenses and/or compensation. Some request compensation, but request that it be deferred to a later time.
27. Before a donor can set-up a charitable project, I (or the donor's financial counselor) provide the donor with a list of documentation required. A copy of a flow chart regarding documentation required to establish a charitable project, and make a charitable distribution is attached as Exhibit E.
28. The donor must first submit a Charitable Project Approval Form for review and approval. A copy of the form is attached as Exhibit D. Upon receipt of the form, I review it and make a preliminary determination. I then forward it to an officer of the Foundation, or the Board, for final approval (or denial). Projects are periodically reviewed by the Board and ratified or curtailed. The Foundation then submits a letter to the donor advising him/her of its determination of the project.
29. If approved, the donor executes an Independent Contractor Agreement. A copy of the Independent Contractor Agreement is attached as Exhibit F.
30. Donors are also required to certify all services provided to a charitable project, and that the services were provided free of charge with the understanding that payment would neither be required nor expected. The donors can submit a Charitable Services Time Allocation Log detailing the name of the charitable project, the date and service performed, the time spent, the standard rate, and charitable amount. The Allocation Log is subject to Foundation approval. A copy of a Services Certification and Allocation Log are attached as Exhibit G.
31. Patients receiving services from donors are asked to complete a Fee Waiver Form detailing their name, the name of the service provider, the date, purpose, and location of the service, and certification that the patient does not have insurance coverage or state/government funded insurance for the services he/she received. However, if the doctor is out of the country, other than Mexico, the patient may not be required to sign

the form if they cannot read it. A copy of the Fee Waiver Form is attached as Exhibit H.

32. If a donor wants to receive reasonable compensation for providing services to his/her charitable project, the donor must submit a Compensation Request Form. If the donor elects to have his/her compensation be deferred, the donor must submit a Participant's Election to Defer Compensation Form. The election must be made before any services are provided. A copy of the Election to Defer Compensation and the Compensation Request Forms are attached as Exhibit I.
33. If a donor wants his/her expenses reimbursed, he/she must get Foundation approval. Donors must submit a Receipts & Expense Log and Charitable Project Expense Reimbursement Request Form (attached as Exhibit J). The Foundation Administrator reviews all Receipts & Expense Logs and Request Forms and either approves or denies the requests. The Foundation has denied reimbursement requests because of the lack of supporting documents and/or because the documentation indicates that the expenses were inconsistent with the charitable purposes of the Foundation.
34. If a donor receives compensation for services provided to his/her charitable project, the Foundation issues the donor a Form 1099 (for every year in which services were provided).
35. Currently, donor service providers, if requesting compensation, are paid an amount that is less than his/her ordinary billing rate for services. (Prior to this amendment, service providers were compensated based on reasonable and customary compensation levels). Donor advised funds are limited in the amount they can fund any charitable projects. The Foundation no longer accepts beneficiary designations on deferred compensation payments.
36. I have reviewed a current report detailing charitable projects. Attached as Exhibit K is a copy of the report. Of the approximately 415 donors of the Foundation, about 120 charitable projects had been established. Nearly 24,000 hours and approximately \$4 million worth of charitable services have been provided to indigent patients.
37. Examples of charitable projects include, but are not limited to: development and operation of medical clinics in Third World countries for the charitable purpose of providing free medical care; free eye exams provided to low income individuals; development and operation of a dental clinic in Mexico for the charitable purpose of providing free dental care; free dental services to orphaned children in Ukraine. With one charitable project alone, a donor provided free obstetric medical care to

752 indigent women, services included consultations, ultrasounds, procedures, and deliveries.

38. Donors can contribute real estate or securities, and the Foundation in turn sells the asset. If the donor has requested that the proceeds be used for a deferred gift annuity and the board approves it, the Foundation uses the proceeds from the sale to purchase a gift annuity. The annuity payment amount is calculated by a commercial software program. Donors claim a deductible contribution based only on the present value of the remainder interest as calculated by the software program.
39. Donors can suggest an endowment be established for the benefit of an educational, medical, state, or county institution. The Foundation approaches the institution, at the request of a donor and proposes a life insurance policy on the life of an individual of the institution. The donor advised fund pays the premium on the life insurance policy. The beneficiary of the policy is the institution and the donor advised fund. In most cases, 80% of the life insurance proceeds go to the institution and 20% goes to the donor advised fund. The donor advised fund then uses the life insurance proceeds to purchase additional life insurance policies - creating a perpetual endowment for the benefit of the institution. The life insurance proceeds received by the Foundation are used to further its charitable and educational purposes.
40. I understand that several years ago, educational student loan programs could be established by the donor advised funds. Students could borrow college and graduate school tuition and expenses in an area related to the Foundation's charitable purposes. In exchange, the student had to agree to either provide 2000 hours of pro bono services to a charity or charitable activity for each year of tuition and expenses received or repay the funds advanced back to the Foundation (i.e., the donor advised fund that funded the loan), with interest, five years after their education has been completed.
41. Students were required to a Commitment Agreement and Education Expense Repayment Agreement. To the best of my recollection, the Repayment Agreement charged an interest rate of 5% of unpaid principle, together with interest, thereon each year for 5 years. Thereafter, any remaining amounts of unpaid principle and interest were to be repaid at the rate of 20% of principle, together with interest each year. The Repayment Agreement also provides for a definite repayment date. The entire loan must be repaid by the end of the 15th year following the original scheduled graduation date.
42. Based upon a report detailing the student loan program, which is attached as Exhibit L, only about 34 of the approximate 415 doctors ever

participated in the program. That is approximately 2.4% of all contributions received by the Foundation. Approximately 7.4% of the Foundation's assets are in student loans.

43. New loans under the student loan program were terminated several years ago.

I declare under penalty of perjury under the laws of the United States and the State of California that the foregoing is true and correct. Executed on November 18, 2004, at San Diego, California.


Sheryl Wakefield

INDEX OF EXHIBITS TO DECLARATION OF SHERYL WAKFIELD

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<u>Exhibit</u>	<u>Description</u>
A	Application to Establish a Donor Advised Fund
B	Example of a receipt of a donation
C	Distribution Request Form
D	Charitable Project Approval Form
E	Flow chart regarding documentation required to establish a charitable project, and make a charitable distribution
F	Independent Contractor Agreement
G	Services Certification and Allocation Log
H	Fee Waiver Form
I	Election to Defer Compensation and the Compensation Request Form
J	Receipts & Expense Log and Charitable Project Expense Reimbursement Request Form
K	Report detailing charitable projects
L	Report detailing the student loan program



1/12/2004

The **Xélan** Foundation

APPLICATION To Establish a Donor Advised Fund

DESIRED NAME FOR DONOR ADVISED FUND

DESIRED NAME FOR DONOR ADVISED FUND

Fund Advisor		Date of Birth	SS#
Spouse		Date of Birth	SS#
Address			
City		State	Zip
Telephone	Day	Evening	

Financial Counselor Name: _____

I. Type of Funding

- Current Funding
 Deferred Gift Annuity
 If selected, at what age would you like payments to begin. _____

Is real estate part of your donation? YES NO
 (If yes, indemnification form must be attached)

If yes and if the deferred gift annuity election is made, what is the cost basis of this real estate? _____

Are appreciated assets part of your donation? YES NO

II. Proposed Charitable Purpose (Please check one. Additional pages may be added)

General Purpose: To provide for charitable, religious, educational, scientific, or health objectives.

Other (Please describe.)

Note: The charitable purpose may be changed at any time by the Fund Advisor with written notice to the Foundation.

III. Successor Advisement

A.	In the event of your death, whom do you nominate as advisor for this fund?	
	Name	Relationship
	Address	Phone #
B.	In the event the successor advisor you have chosen can not, for any reason, fulfill his/her responsibilities, whom would you recommend as the alternate fund advisor?	
	Name	Relationship
	Address	Phone #

Fund Advisor Statement

By completing and signing this application, I hereby apply to participate in the **xélan** Foundation Program. I understand that the full amount of my initial contribution is tax deductible unless the deferred gift annuity election has been selected. Also, I understand that the contribution amount less fees (set-up fee, annual administration fee and marketing fee) will be deposited and maintained in a separate investment account. I hereby consent to the automatic deduction of the Annual Administration Fee from the Donor Advised Fund investment account. I certify that I understand the nature of donor- advised funds

and will conduct activities which satisfy the requirements of the Internal Revenue Code. I understand that in order to qualify as a deductible contribution for income tax purposes, the ownership and custody of my donated funds and property will be fully relinquished to the _____

_____ a Donor Advised Fund of the **xélan** Foundation. These statements accurately represent my desires for my charitable fund at the **xélan** Foundation.

APPLICANT:

Signature

Date

Name (please print)

* After signing, please return with your personal check made out to the xélan Foundation to your **xélan** Financial Counselor.



xélan Foundation

A Donor Advised 501(c)(3) Public Charity

Tax ID Number 74-2861236

xélan Foundation Board of Directors
Robert M. Appleman, MD, FACS, Sacramento, CA
Donald H. Devlin, DDS, San Leandro, CA
Carl J. Flatley, DDS, MSD, Dunedin, FL
L. Donald Guess, DMD, San Diego, CA

Receipt for Gift of Real Properties
by
xélan Foundation Title Holding, L.L.C.

Dr. Guillermo Arbona
Enid Arbona
834 Werner Way
Worthington, OH 43085

Dear Dr. Guillermo Arbona and Mrs. Enid Arbona:

Thank you for your charitable donation on December 30, 2003 of the following real property: which the General Warranty Deed is attached hereto and incorporated herein, to the xélan Foundation via the xélan Foundation Title Holding, L.L.C. The xélan Foundation is a tax-exempt, public foundation under IRC Sections 501(c)(3) and 170(b)(1)(A)(vi). No goods or services were provided for this donation. For your convenience we have enclosed IRS form 8283. Please fill this form out and forward back to xélan Foundation. We in turn will fill out the appropriate information and forward it back to you, so you will be able to include it in your 2003 tax returns.

To issue this tax-deductible receipt, your contribution must be a completed and unrestricted gift to the xélan Foundation. You may, however, request that your donation be directed toward an approved project of the xélan Foundation. Our records indicate that you prefer the xélan Foundation Board of Directors chooses to direct the gift to an appropriate project of xélan Foundation. Your continuing participation in this charitable activity is appreciated.

Please retain this letter for tax purposes.

If you have any questions, please feel free to call.

Sincerely,



L. Donald Guess
President





Distribution Request

Name of your Family Public Charity

Date of Request

Name of Charity (payable to)

Contact Person at Charity

**Address and telephone number
of Contact Person**

Amount of Distribution

Purpose of Distribution

OPTIONAL: If you would like to make automatic distributions from your Family Public Charity for donations to this charity on a periodic basis, please complete the following:

Amount: \$ _____ To begin: Right away _____ or Month/Year: _____

Check one: ___ monthly
 ___ quarterly
 ___ annually (please indicate month _____)

To continue indefinitely?: Yes ___ No ___ or Last donation to be sent (date): _____

Other instructions or comments:

Signature of Donor

xélan Foundation Approval

NOTE: *All checks will be sent to you unless you request otherwise.*



Charitable Project Approval

Name of your Family Public Charity

Charitable Project Name (or type)	
Date(s) of Charitable Project	Ongoing?
Location of Project	

Pro Bono Service to be Provided	Estimated Costs
Description:	Amount
Please attach supporting documents: fee schedules, itineraries, memos, reference letters, etc.	

Estimated Total: Check one: if ongoing, for year _____; for Project _____ \$ _____

Signature of Donor

Xélan Foundation Approval

Date

Date



Xélan Foundation Paperwork Path

Charitable Intent

Charitable Disbursement

- Disbursement Agreement (1st)
- Check Issued 1-3 Weeks



Charitable Project

- Independent Contractors' Agreement (1st per year)
- Project Approval Form (Not to be required if BONA in doing any work)

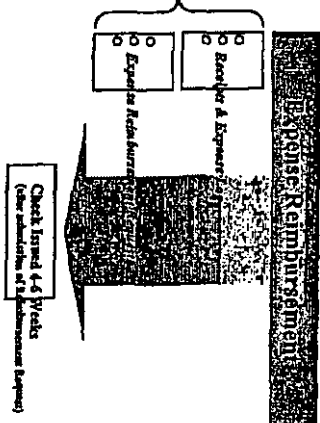
Domestic Projects

- Receipt & Expense Log (If expenses are to be reimbursed)
- Time Log / Detailed Expense Certification (If expenses are to be reimbursed)
- Other (If applicable)

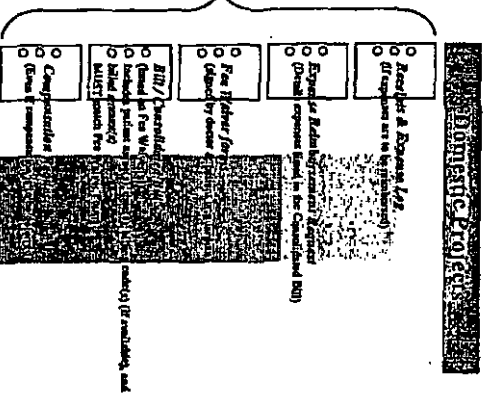
Foreign Projects

- Receipt & Expense Log (If expenses are to be reimbursed)
- Time Log / Detailed Expense Certification (If expenses are to be reimbursed)
- Other (If applicable)

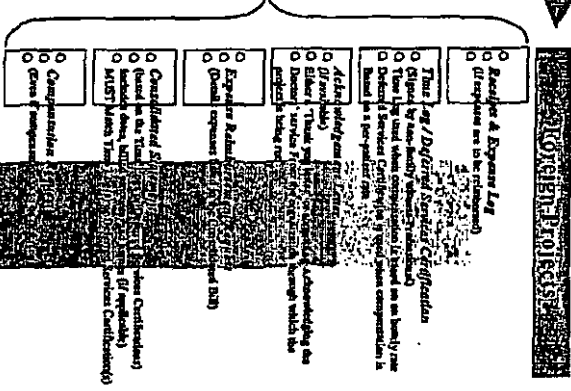
Submitted together to the Foundation Administrator



Submitted together to the Foundation Administrator



Submitted together to the Foundation Administrator



Check Issued 4-6 Weeks (Other activities of the Foundation Support, (see Worksheet 8070) (Certified IIR & Compensation Request))

Check Issued 4-6 Weeks (Other activities of the Foundation Support, (see Worksheet 8070) (Certified Receipts & Compensation Request))



INDEPENDENT CONTRACTOR AGREEMENT

THIS AGREEMENT ("Agreement") is made and entered into this ____ day of _____, 20____, by and between xélan Services Organization, LLC ("xélan Services"), an Idaho Limited Liability Company, and _____, ("Contractor");

WITNESSETH:

WHEREAS, xélan Services has entered into an agreement with xélan Foundation, Inc. to further xélan Foundation's charitable purposes; and

WHEREAS, xélan Services has determined that it can best accomplish its charitable purpose by providing services in the approved project(s) (the "Charitable Project") attached as Exhibits hereto which Charitable Project has been submitted to and approved by the Board of Trustees of the xélan Foundation, Inc. as being within the guidelines of charitable activities of the xélan Foundation; and

WHEREAS, it is necessary for xélan Services to utilize the services of the Contractor in connection with the Charitable Project, and

NOW THEREFORE, the parties hereby agree as follows:

Appointment and Acceptance. Contractor hereby acknowledges that the Charitable Project is a worthwhile endeavor which he is willing and able to promulgate to the best of his ability and hereby accepts the position of Independent Contractor for the Charitable Project on the terms and conditions set forth in this Agreement. xélan Services hereby acknowledges that Contractor is well-suited to provide services for the Charitable Project as its Independent Contractor and does hereby appoint Contractor to such position subject to the terms and conditions set forth in this Agreement.

Duties. Contractor's duties shall be as described in the attached Exhibits.

Reports. Contractor shall undertake to satisfy all the obligations of xélan Services to xélan Foundation which include the following: prepare and submit regular quarterly written reports to xélan Services of all activities of the Charitable Project, including but not limited to numbers of persons affected by the services rendered, types of services provided, results of the services, and expenditures made in connection with the Charitable Project. In addition, Contractor shall assist xélan Services in submitting an annual written report to xélan Foundation which summarizes the activities of the Charitable Project for the preceding year. xélan Foundation may provide forms and specific questions that Contractor agrees to answer completely and to the best of his ability.

Compensation. xélan Services agrees to pay Contractor for services rendered as described in the attached Exhibit(s) payable within 15 days after the end of the month in which services are rendered. All payments shall be subject to withholding taxes. Such compensation may be deferred by the Contractor pursuant to the terms of a Deferred Compensation Agreement which may be executed by the parties.

pertaining to such work.

8.3 Assignment of Rights. The rights of each party under this Agreement are personal to that party and may not be assigned or transferred to any other person, firm, corporation, or other entity without the prior, express, and written consent of the other party.

8.4 No Waiver. The failure of either party to this Agreement to insist upon the performance of any of the terms and conditions of this Agreement, or the waiver of any breach of any of the terms and conditions of this Agreement, shall not be construed as thereafter waiving any such terms and conditions, but these shall continue and remain in full force and effect as if no such forbearance or waiver had occurred.

8.5 Indemnification. Contractor will indemnify xélan Services against and hold xélan Services harmless from, and pay any and all losses, claims, demands, and/or damages of whatsoever nature and kind arising out of or related in any fashion to services provided pursuant to the terms this Agreement, regardless of who makes the claim. Contractor will defend all such actions at its own expense, including attorney's fees, and will satisfy any judgement rendered against xélan Services in any such action.

8.6 Paragraph Headings of Agreement. The paragraph headings throughout this agreement are for convenience and reference only, and the words contained herein shall in no way be held to explain, modify, amplify or aid in the interpretation, construction, or meaning of the provisions of this agreement.

8.7 Contextual Guide to Agreement. Where the context requires, the use of the singular in this agreement includes the plural, and the plural includes the singular, and the use of any gender shall be applicable to all genders.

8.8 Interpretation of Agreement. The Parties agree that in all cases, the language of this agreement will be construed according to its fair and simple meaning and not strictly for or against either party.

8.9 Persons Bound by Agreement. All covenants, conditions and agreements contained herein shall extend to the heirs, personal representatives, executors, administrators, successors, assign, and/or other persons or entities claiming legal or equitable interest of the respective party.

8.10 Integration and Amendment of Agreement. The parties acknowledge that the terms of this agreement may vary from the terms negotiate or as evidenced by preliminary agreements between the parties made prior to the execution of this agreement. The parties agree that the terms, covenants and conditions of this agreement shall supersede all such prior negotiations and agreements, and that there are no other agreements contained in this agreement, that this agreement shall be and is the final agreement of the parties and shall control. No modification of the agreement shall be valid unless in writing, executed by the parties to this agreement.

8.11 Governing Law. The validity, meaning and effect of this Agreement shall be





FEE WAIVER FORM

Last Name, First Name Middle Initial

Date of Treatment/Surgery/Visit	
Indicate purpose of visit	
Dentist/Physician Name	
Location Name, (clinic) City, State	

I, _____ (print your name) acknowledge the fact that I did not offer or bequeath any monetary amount to the dentist/physician who treated me on this day. I admit that I received gratis care.

Signature of Patient

xélan Foundation Approval

Dentist/Physician Signature



Deferred Compensation Plan Distribution Request

Name of your Family Public Charity

Date of Request	
------------------------	--

Distribution Options: Please check one.

Lump Sum:	A single lump sum payment.
Annuity:	Annual payments based on life expectancy as actuarially determined by the Company.
Joint Annuity:	Annual payments based on joint life expectancy of Participant and his or her spouse.

Installment Payments:	Annual Payments over _____ years.
Check One:	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Annual (Please Indicate Month)

Other instructions or comments:

Participant's Signature

xélan Foundation Approval





PRO-BONO PROJECTS

Client Name	FDN #	XPC	Time Period	Project Name	Project Description	Number of hrs w/yr	Patients Served
ABBOTT	7050	Stap	11/00 - Ongoing	Flying Samaritans	Fly in private aircraft from Phoenix to Lopez Mateos Mexico 1 weekend per month, share aircraft expenses, conduct a medical/dental clinic there no charge to patients.		
AGUILAR	8185	Russo	1/1/00 - Ongoing	Pro Bono Office Dental Care	Provide gratis dental care to patients that are seen in office who have no insurance or have low income		6
AGUILAR	8185	Russo	4/1/00-5/01-00	Dental Mission to Mexico	Will participate in the dental mission that is coordinated by the local units to provide dental care to local residents who otherwise would not have access to quality dental care or instruction.	3	
AGUILAR	8185	Russo	12/23/2001- 12/26/01	Dental Care in Coahuiltepec Residents	San Martin Jalisco, MX, Provide dental cleaning and toothbrush instruction to convalescent home residents	7	
Aldridge	7056	Gross	1/1/1999	Student Scholarship	Services include: Creating, updating web pages, installing and upgrading software, answering and creating email messages, submits site to search engines, research educational institution, and their financial programs, maintaining student application file	53	
BACHMAN	8332	Allen	May 21- ongoing	Endodontic Services	Providing charitable endodontic specialty services to those who are less fortunate and unable to obtain specialty level endodontics \$800-1,500/treatment, total \$25,000-\$40,000		
Baethn	8332	Grober	12-31 ongoing	Orthodontics Pro-Bono	I am going to provide on going comprehensive orthodontic diagnosis and treatment to patients who do not have the ability to pay or are not covered by any dental insurance. These services will be provided in my offices. I will be charging reasonable and customary fees which will be approximately \$4200.00 per patient and adjusted annually in honor of Melissa Belton, who was an oboe performance major at Birlia University when her life here among us tragically ended in 1999, this Scholarship Program is being offered by the Stephen and Wanda Belton Foundation.		
Belton	7026	Hayden	5/1/2004	Blain Oboist Summer Scholarship Program	This program will provide tuition support for a qualified individual to attend a summer music program of their choice in honor of Melissa Belton, whose dream of pursuing graduate studies in oboe performance ended when her life here among us ended in 1999, this scholarship is being offered by the Stephen and Wanda Belton Foundation. This scholarship will provide tuition support for two years to a qualified individual to attend graduate school in oboe studies.		
Belton	7026	Hayden	12/1/2004	Graduate Oboe Education Scholarship			
BERBANO	8270	Stach	5/27/2001- 6/15/2001	Mad Mission USA Inc.	Traveled to the Philippines to provide medical care to patients who are indigent and unable to pay @ \$62.50 an hour.	160	
BIGLEY	8160	Heinip	3/00 - Ongoing	Fund Raising	Coordinates fund raising for The Cystic Fibrosis Foundation and St. Rita Elementary School	865	
BIRKMAN	8082	Terman	3/22/00 - 3/26/00, 6/28/00 - 7/14/00	Church Performance Projects	Singing in church group - traveling performances	86	
BURCHEL	8264	Harris	6/01 - Ongoing	Pro Bono Medical Services	Pro Bono Medical services will be provided to patients whose selection is based upon need of treatment at the time of service, inability to pay for the treatment rendered, and lack of a third party provider. The Pro Bono medical services will be provided in the office, hospital, home, and/or nursing home. Fees will be based upon the usual and customary fee schedule.		2
BURCHEL	8264	Harris	6/01 - Ongoing	Pro Bono Educational Services	Teaching Medicine - related subjects in a college/university/ educational setting, as well as, performing medical seminars/ lectures for community service organizations/ student health professional groups. Also, this project can include hands-on clinical teaching courses, on a one-to-one basis, with students in physician assistant, residency/ medical pre-medical programs. These education services will be provided in the United States of America and foreign countries based upon an hourly fee of \$200 per hour.	6	

Client Name	FDN #	XRC	Time Period	Project Name	Project Description	Number of hours work	Patients Seen
BURCHARD	8077	Burchard	12/9/1999 - Ongoing	Unpolished Horizons	Organizing Children/Parent Seminars on seeing eye to eye		
BURCHARD	8077	Burchard	8/4/01 through 8/17/01	Coral Reefs of the Grandlines	Make survey of coral reefs in the Grandlines		
BURCHARD	8077	Burchard	6/19/01 through 6/26/01	Otopusnet of Costa Rica	Surveying the 100 species of Octopus	96	
BURCHARD	8077	Burchard	10/2/01 - ongoing	San Diego Fish Survey Project	To support a group of 6-10 divers over a 2 year period in collecting data on local fish using the REEF survey methods		
BUTKA	8226	Harris	9/13/2000 - Ongoing	Pro Bono Educational Services	Teaching Medicine, Language or Linguistics in a college, university or education institutional setting, as well as to community services organizations on a Pro Bono basis will be provided. The educational services will be provided in the United States and foreign. Composites based upon an hourly fee of \$200.	3	
BUTKA	8226	Harris	9/13/00 - Ongoing	Pro Bono Medical Services	Medical services will be provided to patients whose selection is based upon need of treatment at the time of service, inability to pay for treatment rendered and lack of a third party provider. The Pro Bono medical services will be provided in the office, hospital, and/or nursing home. Fees will be based upon the usual and customary fee schedule.		33
CASSIDA	8302	Shop	2/22/2004-3/6/2004	Habitat for Humanity	Habitat for Humanity has a goal of building affordable permanent housing for the underprivileged around the world. Using volunteer labor, donated materials and materials purchased by the gifts of Habitat supporters and providing mortgages with no interest to qualified applicants, local communities help make the dream of home ownership come true. In turn, the recipient of the home are required to invest hundreds of hours of sweat equity in their home and/or Habitat Home for another family. We will be part of the volunteer labor force for this two-week build, joining up with the RV Care avengers, who bring their own motor homes to the site of the build. Volunteers pay for all the their own expenses and are encouraged to donate money for the house they build.		
CHAN, ALFRED	8074	Morgan	1998 through 1999	Chinese Opera	Attend meetings, practice, performance, give seminar	908	
CHAN, JUDY	8074	Morgan	1998 through 1999	Chinese Opera	President and chairman of the non-profit organizational Chinese Opera board	929	
CHAN, JUDY	8074	Morgan	1/99 through 12/99	Asia Pacific Culture Center	1st Vice-President of non-profit organization (expenses, time, traveling)	21.5	
CHAU, YING	8266	Burns		No Projects submitted yet.			
CHEN, EDWARD	8223	Davenport	2/6/2001	Medical Surgical Conference Lecture	Lecture on chronic pain/pain management to the medical staff at Morton Plant Hospital Medical Surgical conference.		
CHEN, EDWARD	8223	Davenport	2001 - Ongoing	Massachusetts Institute of Technology Educational Counselor	Literature search 6-hours @ \$150. & slide preparation 11-hours @ \$150. Interview applicants for college admissions, 1-Hour per student, and submit report/recommendation -1-Hour per student. Recruit prospective applicants at regional fairs 6-Hours per fair Estimate 1 fair per year & 5 students per year @ \$70.00 an hour		1
CHEN, EDWARD	8223	Davenport	4/23/2001	Department of Medicine Grand Rounds	Grand rounds and case presentation on Percutaneous Pain management at Morton Plant Hospital department at medicine meeting presentation 15 minutes & discussion 30 minutes. Literature search 4-Hours @ \$150 & preparation lecture materials 2-hours @ \$150.		
CHEN, EDWARD	8223	Davenport	3/23/01, 3/30/01 & 4/6/01, 4/13/01	Professional Services	Spinal steroid injections - proposed pain treatment related to postherpetic neuralgia of the thoracic level (back and chest) Involves multiple injections 2-4 over 4 weeks must be performed as outpatient in monitored hospital setting to measure vital signs and reaction to injection. Pain has been refractor to multiple corrective treatments.	2	

Client Name	FDN #	XFC	Time Period	Project Name	Project Description	Number of hrs wtk	Patients Seen
CLARK	8401	Thamer	09/20-24/2004	Medical Missions School Physicals Barefoot Schools Fort Au Prince Haiti	Will provide dental care and physicals to children attending Barefoot School for two days. Will provide medical care to Runaka Village which is designed for unwell Mothers and their children. Later will travel to Montross to provide those in need with medical care.		
COOK	8305	Stoip	5/15/01 - Ongoing	Charitable Dental Health Care	ongoing performance of charitable dental health care by Edward S. Cook, DDS located in Santa Fe, New Mexico to indigent patients. Services will be billed at usual and customary charges for the applicable procedures performed. \$50,000/yr.		
COOK	8223	Stoip	01/01/01 - Ongoing	MIT Educational Counselor	Interview applicants for college admissions		
CORBILLO	8255	Cosgrove	01/01/02 - Ongoing	Special Olympics Virginia	Regular hours volunteering with groups of local special athletes, physical training to compete in competitions held in Virginia and West Virginia. Practices weekly and 3 and 4 days trips. My uncompensated rate was valued at \$17 in value. Also assist in several trips when we take the subjects to competitions as a chaperone/personal trainer/coach. Trip to University of Wisconsin in a variety of country projects over the winter with US Embassy personnel from Vietnam (Stoip) to further consult on setting up surveillance program to monitor drug use among Thai youths. Set up appointments with several members of the Faculty of Public Health, Mahidol University, for several proposed projects. 04/05/01 - Fly to Hanoi. Meet with Dr. Phung Cam, of the National Institute of Hygiene and Epidemiology. To develop several projects concerning public health in Viet Nam. 04-06-01-04-07-01 Attend project meetings with the Vietnamese government, several organizations and the Hanoi Medical School. 04-08-01 - Take train to Hue (All day) 04-09-01-04-12-01 - To begin several charity projects with Nguyen Han Khoa and Dr. Nguyen Van Thai of the Center of Transology Orthopedics and Surgery. 04-13-01 - 04-15-01 Flood relief projects in Thua Thien Province with Vietnamese Boy Scout 04-16-01-04-17-01 - Begin health projects at a Catholic and a Buddhist orphanage 04-18-01 - Train back in Hanoi 04-19-01 - Report to Vietnamese Government. Fly to Bangkok 04-20-01-04-21-01 - Meeting OB/GYN services for uninsured or indigent patients seen at (my office) 1-4448 San Pablo Down Rd. El Sobrante, CA 94803 2-Doctors Hospital San Pablo, CA 3-Alta Bates Hospital, Berkeley, CA.		
CUNNING	8085	Burchard	4/01/00 through 4/22/00	Mission to Thailand and Vietnam	It is my continuing goal to provide free dental services to the poor and/or orphaned children in the Kiev and Vinitsa, Ukraine. This is my second trip to Kiev with the purpose of beginning a dental clinic for these children. I am doing this in association with the Christian Dental Association and the Ukrainian Children's Project. I am working with local authorities and businessmen in establishing and licensing this clinic. It is my intention to do charitable and free dental work in this facility. I will be providing emergency and interim restorative care, at no charge. All supplies and some equipment will be provided by myself. This is in the second part of an ongoing and continuing project. I am changing my foundation \$50 an hour for my time.	161.5	
DAVENPORT	8180	Thomas	3/15/00 - Ongoing	Pro-Bono OB/GYN Services	1. High Risk OB Care to average of two women weekly (2 per week) 2. Services will include consultations, ultrasounds, procedures, and deliveries. 3. Three Ultrasound imaging of babies in utero to improve maternal fetal bonding.		6
David Raton	8013	Rick Jove	05-24-03 - 08-24-03 Ongoing	Linda Raton Ukrainian Children's Project	Quality Assurance review of data medical in medical office for evaluation of First Trimester acceptability to screen. Will need research assistants, Statisticians, Preparation of Manuscripts and Dr. Doany will supervise this staff and oversee project.		
DOANY	8319	Russo	11/09/01 - ongoing	High risk OB Care to Indigent Women			752
DOANY	8319	Russo	07/10/2004 - ongoing	Researcher Quality Assurance			

Client Name	FON #	XFC	Time Period	Project Name	Project Description	Number of hrs work	Patients Seen
DYKEN	8329	Dyken	2/28/01 - ongoing	Radical Smiles	To provide orthodontic care to children who exhibit great financial need and have a socially handicapped. Patients will be selected from secondary charitable organizations (such as United Way) or from personal knowledge of the child from obtaining the needed orthodontic care. Plans include a minimum of two charitable cases per year. \$4118/case		6
DEMAIN	8321	Morgan	11/1/2001 - ongoing	Teaching and Educational Farm Workers Clinic	Teaching at the University of Washington Medical School. \$11A regarding medical specialty		
RELLERS	8312	Burns	08/20/01 - 2002 Ongoing		Free Eye exams for diabetics and Low income and non insured, will spend 24 hours per month at the clinic, will charge standard fees		38
	8312	Burns	08/20/2001 - Ongoing	Pro Bone Office Work	On patients who I see in my office who do not have medical insurance and are on a limited budget with no resources to pay for their medical care.		140
ELMER	8330	Sher-Vel	10/03 - Ongoing	Steroid Injections for Indigents	Steroid injections for patients without ins. and/or unable to pay for such services. \$60/injection. Total \$6,000 same as above Total \$2,400		
ELMER	8330	Sher-Vel	1/1/03-12/31/03		Phase I. Data collection 20 hours @ \$175. Phase II. Written report summary 10-15 hours @ \$175. Phase III. Presentation medical staff of Kumpell Medical Center each Monday @ \$175.0 Clinical duties related to my phase @ \$10. an hour.		
ENGDAHL	8195	Hancock	1/9/00 - Ongoing	Diagnosis of Breast Cancer in Northwest Montana by Mammography and Ultrasound test.	Teaching Diagnostic radiology techniques to student interns at the Kallepell Regional Medical Center, Kalispell, MT. Applied anticipated 250 hours per year @ \$175. per hour. Approximately \$5,000. annually in teaching material expenses to which I will submit receipts.		
ENGDAHL	8195	Hancock	8/27/02 - Ongoing	Diagnostic Radiology Teaching	Review charts, collect data, present monthly reports to COT committees, Hospital staff. 10 hours per month @ \$150. per hour for 9 months		
FINKELSTEIN	8188	Spencer	3/00 through 12/00	AMI ER Treatment Quality	Lecture honorarium \$300 per lecture. Research and prep time for each lecture on 3 different topics 20 hours per lecture total of 60 hours @ \$100 an hour. Topics include medical emergencies at sea, stroke, and crisis intervention in the ER.	5 @ \$100/hr 100 @ \$100/hr	
FINKELSTEIN	8188	Spencer	3/31/00, 4/15/00, 5/23/00	Emergency Medicine Lecture Series	16 hours of teaching for each session (2 sessions/year @ \$100 per session). Prep time and research 4 hours per class 16 classes per year @ \$75.00 an hour.		
FINKELSTEIN	8188	Spencer	3/00 through 11/00	Teaching Boasting Safety Classes	To provide in the office and in the hospital, modern neurological & spinal surgical care to indigent (with little or no means to pay immediately expressing to bookkeeping department) patients on a gratis (free) basis per established fee schedule.		5
FISCHER	8214	Harris	3/24/00 - Ongoing	Neurosurgical & Spinal Surgical Camp	For patient without ability to pay or without insurance coverage		16
FOLEY, JOHN	8030	Thomas	1998 - Ongoing	Medical Services	Interpretation of mammograms and other imaging studies for uninsured patients		
FOLEY, MATTHEW	8109	Thomas	1999 - Ongoing	ProHealth	Interpretation of studies for patients who receive free care at Deaconess Nishaba Hospital		
FOLEY, MATTHEW	8109	Thomas	1999 - Ongoing	Free care @ Deaconess Nishaba Hospital	Provide consultation to Habitat for Humanity on first aid need, and also to provide first aid coverage for the construction event @ \$1,000. a day.		
FROMM	8021	Nelson	3/18/99 - 3/28/99	Habitat for Humanity	Pro-Bono services on a patient charge basis by Gert Lynn from MD and Robert H Fromm JR. MD as documented on deferred services certificate		
FROMM	8021	Nelson	11/1/98 - Ongoing	Pro-Bono Services	Medical direction of Paramedic Training program curriculum overnight and consultation with faculty		
FROMM	8021	Nelson	9/8/99 & 9/9/00	Medical Director, College of the Malheur			

Client Name	FDN #	XFC	Time Period	Project Name	Project Description	Number of hrs w/rt	Patients Seen
FROMM	8021	Nelson	1998 - 2004	Joint Review Committee for EMS Training	Appointed Emergency Medicine Representative to National Accreditation body for EMS training programs - meeting and travel 3 days a year @ \$1,000 a day. Referee time \$2,000 a year and air visits \$1,000 a day total of \$5,000 a year		
FROMM	8021	Nelson	10/25/01 - ongoing	Faculty Post, Baylor College of Medicine	Dr. Fromm will participate in the training of cardiology fellows in the ACGME accredited training program at Baylor through bedside rounds, didactic lectures. He will also participate in training of critical care fellows, medical residents, medical students, nursing staff and pharmacy professionals		
Geertz	8177	Bright	10/00 - Ongoing	Pro Bono Dental Services	Pro Bono Dental services (Endodontics) covering 100% compensation for services and/or partial compensation of services. Clients will be selected on a need basis by Doctor Goertz. Doctor Goertz will provide a documented charitable services time allocation log and a fee waiver form as designated by the Xelan Foundation. Doctor courtesy fee for patients who have the inability to pay and/or have no insurance coverage for Dental or Endodontic services. Doctor Goertz will establish percentages of payments for courtesy services for Endodontic and Dental services. Doctor Goertz will provide a documented charitable services time allocation log and a fee waiver form as designated by the Xelan Foundation.	552	
Gordon	8222	Thamer	ongoing	National Urban League	Voluntary effort in time and talent to lead key African-American professionals as participating colleges where they tutor students develop interview skills, lectures in classes, help develop internship opportunities and provide ongoing mentoring relationships. These relationships have proved invaluable and often the difference between success and failure for participating students who often come from first college attendance families. \$3,100/trip \$6,200/yr.		
Gordon	8222	Thamer	10/23-24/03	National Urban League	Provide treatment and surgery for the Skin Cancer Patients in the office and other facilities. The service will be at no cost to the patients who can not afford to pay for service or have no health insurance.		
Grigo	8225	Deyley	7/00 - Ongoing	Treatment of Skin Cancer	Projects will include screening for the American Cancer Society at outside facilities and in the office. The service will be at no cost to the patients who can not afford to pay for service or have no health insurance.		
Grigo	8225	Deyley	7/00-8/01	Cancer Screening (Not Doing)	Drum and Accordion music event called Full Moon Drumming (tent, instruments, etc.)	325.45	
HANCOCK, JOHN	8153	Hancock	12 dates in 1999	Drum Acoustical Music Instruction	Drum and Accordion music event called Full Moon Drumming (tent, instruments, etc.)	109.58	
HANCOCK, JOHN	8153	Hancock	1/19/01 - Ongoing	Angler Education Program	Maintain fish wildlife & parks has volunteers lecturing in schools to get kids to start fishing		
Hancock, Suzanne	8153	Hancock	1/00 - Ongoing	Instructional Drumming & Worldwide Percussion	Indoor/Outdoor drumming & percussion instruction at a non-denominational church. Community Medical Center - Monthly visitation of rehabilitation patients to facilities and teach percussion skills, subodining, e-mail, and administrative, Recording, mixing, editing and productions of CD's and tapes		
Hass, Glenn	8310	Hancock	4/02-ongoing	Pro-Bono Dental Services	Dental services to patients unable to pay for dental services. \$10,000/yr.		
HEALY	8325	D.Hartenstein	06/02-Ongoing	Alpha Medical Mission/Hono. Hawaii	Provide general pediatric medical care in both outpatient & inpatient setting as part of a volunteer medical surgical team. Since outpatient clinics usually far exceed the average number of patients seen in office.		65
HEALY	8325	D.Hartenstein	11/29/02-12/08/02	Alpha Medical Mission/Philippines	Acute pediatric medical & surgical care to underserved population in the Philippines.		
HEALY	8325	D.Hartenstein	2/12 - 3/2/03	Medical Mission in Luang Prabang, Laos	Conducted medical and surgical free care. Provide general pediatric medical care part of Volunteer Medical Surgical Team.	78	
HEALY	8325	D.Hartenstein	1/1/04-1/31/04	Pro-Bono Services Medical and Teaching/Training	The services to be rendered involve medical training and teaching to physicians in being at the Kapitiwai Medical Center, 1319 Punaluu Street, Hono Hawaii 96516. Dr. Michael Healy is not reimbursed for such teaching and voluntarily donates his time amounting to 1.5 hour/day. Request to host to office time and billable services furnished while providing Pro Bono services to the Dept. of Pediatrics. Requesting \$100.00 per hour		

Client Name	FDN #	XFC	Time Period	Project Name	Project Description	Number of hrs w/yr	Patients Seen
Hocht	8396	S. Allen	5/14/03-ongoing	BNT and Facial Plastic Surgery for the Less Fortunate	Ho will treat domestic violence patients and patients with inadequacies means will be treated medically and surgically with minimal or no cost \$40,000		
HEDRICK	8019	Wright	07/01/98 - 08/19/98	Russia Trip			
HEDRICK	8019	Wright	03/99-4/99	Russia Trip			
HEDRICK	8019	Wright	06/09/03 - 07/02/00	Kyrgyz Russia Trip June 2000	Various Trips Reimbursed		
HEDRICK	8019	Wright	09/15/00 - 10/15/00	Russia Trip	Discovery & Planning of two possible Proj. in Future		
HEDRICK	8019	Wright	11/3/98 - 11/22/98	Educational/Medical Church	Assist teachers w/Christian Ethics Curriculum		
HEDRICK	8019	Wright	2/8/99 - 2/24/99	Planning Foundation School (Philippines)	Help set up foundation to fund school for bible training (Tech & Industrial Skills)		
HEDRICK	8019	Wright	07/10/99 - 7/31/99	Medical-Dental/Kosovo, Ruzora	Demistry in Village Clinic		
HEDRICK	8019	Wright	04/6/00 - 04/8/00	Whittier Hills Baptist Church Dallas	Appointed Delegates of Members Forum 2000		
HEDRICK	8019	Wright	05/10/00 - 05/27/00	Global Resources Foundation Inc.			
HEDRICK	8019	Wright	05/10/00 - 05/27/00	Ukraine Trip	Various Trips Reimbursed		
HEDRICK	8019	Wright	11/3/00 - 11/16/00	ISP Mongolia (Ulan-Bator)	Educational Out reach Ministry Basic trip expense Personal Costs supplies material misc		
HEDRICK	8019	Wright	03/13/01 - 04/01/01	ISP Mongolia (Ulan-Bator)	International School Proj.		
HEDRICK	8019	Wright	06/18/01 - 06/22/01	International School Project			
HEDRICK	8019	Wright	10/29/01-11/14/01	International School Project Mongolia			
HEDRICK	8019	Wright	1/30/00-2/19/00	China English Teacher's Workshop			
HUNMAN	8265	Tune	1/2/01 - Ongoing	Human Charitable Patient Services	Caring for Medical, physical, emotional & spiritual needs of people unable to pay for services without undo burden on them financially. This will include urology as well as non-urologic patients without Medicare, Medicaid, insurance, or other means of paying for medical services without placing a significant burden upon them financially. The project reserves the right to determine financial need and qualification for the program.		3
HUNMAN	8265	Tune	12/18/01-ongoing	Human Medical, Missionary Project	Providing surgical and dental care to the local population. Includes evaluating patients in clinics, obtaining laboratory studies, providing medication, taking x-rays as well as doing surgical procedures. Additional effort will be directed towards ministering to the emotional and spiritual needs as appropriate. Above services to be provided at \$75 an hour. Patient coordination in clinic and through out the various departments; medical assistant as needed. Additional effort will be directed towards ministering to the emotional and spiritual needs as appropriate. Above services to be provided at \$15.00 an hour.	139@/\$75/hr 133.5@/\$15/hr	
Holderness	8138	Kennedy	3/31/01 - 04/06/01	World Changers Bible Institute Jamaica Mission	Trip to Montego Bay, Jamaica includes missionary community outreach evangelistic campaigns, one on one street ministry, ministry to the impoverished children, exciting local church ministry, ministry for drama and many other opportunities to serve and minister. This is essentially a short term evangelistic mission outreach coordinated through the local church in Jamaica that WBCI has been working with for a number of years. Will not be doing medical work, will be doing bible teaching and ministry.		
Hines	8289	G. Guess	12/18/01-ongoing	Free dental care	Providing free dental care		
HYMAN	8193	Bright	2000 - Ongoing	Teaching Films	Teaching Films		7
JACKSON	8121	Morgan	1999	Reconstructive Surgery	Surgical fees reconstructive surgery travel. Donating surgical fees at local hospitals to individuals who cannot afford the surgical procedures. Donating surgical fee to non profit organizations who provide medical care to third world countries.		

Client Name	FDN #	KFC	Time Period	Project Name	Project Description	Number of hrs work	Patients Seen
Kspetsanski	8092	Burchard	01/01/01 - 06/01/01	Care Studies in the Operative Mgmt. Of CRTPH	Develops a series of training Videos and CDs, equipment rental, labor & consumable supplies \$13,500		
Karp	8333	Time	1/02/02 - Ongoing	Karp Charitable Patient Services	Caring for medical needs of people unable to pay for such services without undue burden on them financially. This project includes specialty as well as non specialty related care for those patients without Medicare, Medicaid, insurance or other means of paying for the medical services. This project provides medical care to those persons not having the ability to obtain quality medical care due to financial or other reasons. Medical Care will be provided by Dr. Karp for patients requiring doctor treatment.		53
KGr's	8250	Stasch	06/05-08/19/2003	UCSF Research Asst. Anita S. Kria	Research assistant in Dept. of Surgery Div of Fed Surg. UCSF. 10 weeks working under the direction of Dr. Hammin Lee, Assistant Professor of Surgery and Pediatrics, in the Fetal Treatment Center at UCSF. Research will assess the response of human hepatocytes (liver cells) to a protein, P53 it suspected to play a role in tumor suppression and as such is an important research issue. \$16/hr. 30hrs/week. Total \$4,800		
KRUEGER	8062	Newmark	7/7/00 - 7/21/00	GANSU Inc.	Cornell transplant (approx. 15) 1 in cities in the Gansu Provinces of China. Consultant & Keratoplasty Kathmandu, Nepal (unknown quantity) Airfare & hotel, misc. expenses. Defers compensation for services and expenses.		56
KRUEGER	8062	Newmark	4/13/00 - 4/16/00	Educational Lectures	Educational Lectures Echisais after LASIK, scanning, Tracking and Customized Treatment in LASIK, comparison of wavefront measurement devices.		
KUNIHIRA	8055	Johnson	2000, 2001, 2002, Ongoing	School of Dentistry - Fundraising by Alumni's Association	Fund Raising on behalf of the School Of Dentistry Loma Linda University as well as disbursement of those funds and supervision of various projects.		
KUNIHIRA	8055	Johnson	2001-Ongoing	Pro bono Work Dental related/SIMS	Free dental care to Mexican nationals who are needy and are not able to receive dental care otherwise. Clinics Mission Trip- Any hours worked apply to Student Loans		
Ladislav	8281	Smith	12/2000 - Ongoing	Pro bono Office/Hospital Work	Provide normal medical services to patients with no health insurance. I am going to be providing medical services to indigent patients who do not have the ability to pay and are not covered by any medical insurance. These services will be provided in my office to patients with need. I will be charging reasonable and customary fees, please see attached fee schedule.		80
Lessemier	8296	Hancock	2001 - Ongoing	Investigative Review Board for Medical Research	Active writing participant of investigational studies in Spokane, WA related to cardiac care. 12 meetings plus additional outside review time meeting 12x2hrs per month @ \$250/hr. Subtotal \$3,000 independent hours of review 3hrs per month on average. Subtotal \$9,000 Total \$12,000	127.5	
Lessemier	8296	Hancock	2001 - Ongoing	Medical Lecturing	Provide various lectures on cardiac related issues to maximize the knowledge available to health care professionals in this care and treatment of cardiac patients. 12 lectures @ \$1,250/lecture. Total \$15,000	6	
Lessemier	8296	Hancock	2001 - Ongoing	Research & Review of Cardiac Care	as an unpaid member of Heart Institute Research Committee, assist and review other physicians research projects related to cardiac care. 18hrs @ \$250/hr. Total \$4,500	3	
Lessemier	8296	Hancock	5/2/2001 - Ongoing	Elementary School Lectures	Lectures to Elementary School Students on the heart to increase the knowledge of the human body to school age children \$500/lecture	1	
Lewis	8360	Spencer	10/5/2002	Volunteer ProBono Physical Exams	Provide free physical, breast exams review patients' medical histories, advice on women's health for Black Madonna Church Health Fair 4hrs @ \$250/hr. Total \$1,000	4	
Lewis	8360	Spencer	11/11/2002	Pro Bono Medical Treatment	Pro Bono medical care for indigent individuals who do not have the ability to pay and do not have insurance		18

Client Name	FON #	XRC	Time Period	Project Name	Project Description	Number of hrs w/ck	Patients Seen
LIBBY	8141	Morgan	1/00 - Ongoing	Charitable Dental Care	Provide free dental care to individuals who cannot afford the required procedures. These individuals will be referred from the following organizations; Neighborhood Health Clinic, South Central Foundation Dental Clinic, Grace Christian School, Alaskan Natives from Rural Villages.		172
LIBBY	8141	Morgan	11/1/00 - 12/31/00	Nepal Service Project 2000	Will be providing volunteer dental care for patients through the Helping Hands Organization.		
LIBBY	8141	Morgan	1/2001-12/2001	Share a Smile Service Project	The Share A Smile Service Project is an ongoing Dental/Medical Care giving project to remote locations in Alaska as well over other world countries. We will provide dental care to patients who cannot afford needed dental care that would otherwise go without. Salaries, Food & Lodging, Transportation, Supplies.		
LINDQUIST	8097	Mohr	Ongoing	Sacred Music for Church Use	Preparation, composition, arrangement, research and publication of sacred music.	4733	
LINDQUIST	8097	Mohr	Ongoing	Tubing	Research and preparation of materials for tubing students in writing, grammar and ESL.	1843	
Lugensbrink	8346	Allen	03/18/2002 - Ongoing	Charitable Orthodontic/Dental Care	Provide free orthodontic/dental care to individuals who can not afford the required procedures.		511
LIVELY	8243	Harris	11/10/00 - 11/19/00	Guatemala Medical Mission	Pro Bono medical General Medical Services (diagnosis, treatment, surgery, and obstetrics) as well as translation for other healthcare providers will be provided to impoverished Guatemalans in a remote regional hospital eight hours from Guatemala City. Indigent patients will be treated in a rural hospital, clinic, and for home within the remote village of Uspantan, Guatemala and outlying areas. The ten day medical mission trip will include 3 travel days no fees for services rendered will be received a daily fee for services of \$400 will be expensed by foundation.	27 days	
LAVELY	8243	Harris	11/1/00 - Ongoing	Pro Bono Medical Treatment	Medical services will be provided to patients whose selection is based upon need of treatment at the time of services, inability to pay for treatment rendered and lack of a third party provider, the Pro Bono Medical Services will be provided in the office, hospital, and/or nursing home. Fees will be based upon the usual and customary fee schedule provided in the office.		46
LAVELY	8243	Harris	11/2/2001-11/11/01	Buck & Madeline Lively Public Charity	General Medical Services (diagnosis, treatment, surgery, obstetrics) as well as translation for other healthcare providers will be provided to indigent Guatemalans in a remote regional hospital in Chichicastenango, they will be treated in a rural hospital, clinic, and/or home within the Guatemala Country. no fees for services rendered will be received. A daily fee for \$450. Work to be expended to the foundation. In addition surgical procedures @ Guatemala used and customary rates will be expended to the foundation.		
LAVELY	8243	Harris	7/19/2002	Boy Scout Physical Exams	Performing physical exams on children in need.		
LAVELY	8243	Harris	8/3/02-8/11/02	Guatemala Medical Mission	Pro Bono medical General Medical Services (diagnosis, treatment, surgery, and obstetrics) as well as translation for other healthcare providers will be provided to impoverished Guatemalans in a remote regional hospital eight hours from Guatemala City. Indigent patients will be treated in a rural hospital, clinic, and/or home within the remote village of Uspantan, Guatemala and outlying areas. The ten day medical mission trip will include 3 travel days no fees for services rendered will be received a daily fee for services of \$400 will be expensed to foundation.		
LAVELY	8243	Harris	Sep-03	School Vaccination Program	Providing flu shots to the students, teachers, and staff free of charge. Dr. will bill for his time there 2 hours will charge \$20 per shot less than 100 shots will be given.		
LURATE	8179	Davenport	01/01/00 - Ongoing	School Athletics	School screening physicals, males will be required to have a genital examination. Orthopedic team physician coverage of athletic events.		2
LURATE	8179	Davenport	01/01/00 - Ongoing	Sports Medicine & Sports Injury Clinic	Provide free sports medicine and sports injury clinics, free assessment for athletes of all ages an orthopedic physician will be available to assess injuries along with a Certified Athletic Trainer.		
LURATE	8179	Davenport	01/01/00 - Ongoing	Orthopedic clinical care in office	Medical services are provided for people who do not have health insurance or are low income individuals.		4
LURATE	8179	Davenport	01-01-00 - Ongoing	Orthopedic emergency care	Provide abundant orthopedic services in hospitals and clinics to people with low income and no insurance.		



Student Loan Report

Student's Name	Last Name	First Name	Degree	Account # (only set)	1st Name	1st Last Name	Loan (Amount Financed) Amount
Bryan K. Fisher	Altman	Eddie A.		8053	Boyce	Goff	\$14,993.14
Bryanne Stewart Fisher	Altman	Eddie A.		8053	Boyce	Goff	\$30,781.80
Amanda Moxlock	Altman	Eddie A.		8053	Boyce	Goff	\$43,630.50
Chad Faulknerberg	Altman	Eddie A.		8053	Boyce	Goff	\$1,169.00
Jeremy John Salvesen	Altman	Eddie A.		8053	Boyce	Goff	\$5,786.68
Nathan Salvesen	Altman	Eddie A.		8053	Boyce	Goff	\$9,812.00
Jessica Mordlock	Altman	Eddie A.		8053	Boyce	Goff	\$48,615.00
Suzanne R. Erennis	Altman	Eddie A.		8053	Boyce	Goff	\$4,515.71
Sarah I. Salvesen	Altman	Eddie A.		8053	Boyce	Goff	\$5,819.00
Katherine T. Fisher	Altman	Eddie A.		8053	Boyce	Goff	\$30,280.00
Jeri Beth Arnold	Arnold	Paul J.	D.O.	8070	Dave	Cline	\$6,878.28
Farzana Badruddoja	Badruddoja	Mohammed	, MD	8045	Mark	Newmark	\$20,510.00
Lindi Rosen Becker	Becker	Hilton	, MD	7010	Rick	Jaye	\$4,216.22
Sarah Belton	Belton	Stephen R.	, MD	7026	Terry	Hayden	\$61,749.84
Melissa Belton	Belton	Stephen R.	, MD	7026	Terry	Hayden	\$15,950.00
Julie M. Belton	Belton	Stephen R.	, MD	7026	Terry	Hayden	\$42,753.00
Mark Patrick Beltran	Beltran	Robert R.	, MD	8008	Robert	Burchard	\$52,230.95
Denise Veronica Beltran	Beltran	Robert R.	, MD	8008	Robert	Burchard	\$82,945.41
Lusannah M Betts Vermaulen	Betts	R. Barbly		8003	Boyce	Goff	\$2,376.30
Ayriann S. Betts	Betts	R. Barbly		8003	Boyce	Goff	\$38,870.29
Danton Betts	Betts	R. Barbly		8003	Boyce	Goff	\$4,625.00
Christopher R. Birkmann	Birkmann	Lewiston W.	, MD	8082	Sherry	Taxman	\$32,643.00
Joseph O. Chan	Chan	Alfred H.	, MD	8074	Craig	Morgan	\$37,350.78
Teresa Chan	Chan	Alfred H.	, MD	8074	Craig	Morgan	\$124,988.10
Reed Elliott Clark	Cline	David H.		8057	David H.	Cline	\$14,016.77
Christopher Clarke	Clarke	Lewis K.	, MD	7038	Darryl	Nelson	\$35,186.03
Anne Elizabeth Clarke	Clarke	Lewis K.	, MD	7038	Darryl	Nelson	\$33,468.03
Katherine Clarke	Clarke	Lewis K.	, MD	7038	Darryl	Nelson	\$5,139.43
Linh-Dan Cunnion	Cunnion	Stephen O.	, MD	8085	Mike	Burchard	\$11,884.00

