

Excerpt from Charles Robertson's August 20, 1970 Notification Concerning Foundation Status

Attachments to Form 4653

The Robertson Foundation

The Robertson Foundation was incorporated under the laws of Delaware in March, 1961. Its letter of exemption under section 501(c)(3) is dated September 21, 1962. Copies of its Certificate of Incorporation and By-laws are attached hereto.

As appears from the Certificate of Incorporation the Foundation was organized exclusively for the benefit of, to perform the functions of, and to carry out the purposes of Princeton University - an organization described in section 170(b)(1)(a). The sole objective set forth in the Certificate (Article 3) is the establishment, maintenance, and support of a Graduate School program in the Woodrow Wilson School at Princeton for the training and education of men and women for government service. The sole recipient of the Foundation's income, funds, and property designated in Article 3 is Princeton University.

Since its incorporation the Foundation has been operated exclusively for the benefit of Princeton and specifically for establishment, maintenance, and support of the new Graduate School program at the Woodrow Wilson School. All the net income of the Foundation and a substantial amount of principal (through advances which have now been repaid out of income) have been paid over to Princeton and used to provide the necessary buildings, faculty, student fellowships and other required

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services. There are now over 100 degree candidates and mid-career government service men and women in the program.

The Robertson Foundation is controlled by Princeton University. The University made it clear from the outset that it could not undertake the long term commitment involved in the project (e.g. faculty contracts, student fellowships, etc.) unless it had effective control of the Foundation. This was agreed to by the donors and the Certificate of Incorporation and By-laws were accordingly drawn to give Princeton permanent control of the Board of Trustees. The Certificate of Incorporation, Article 11, provides for seven members each of whom shall be a trustee. Article II of the By-laws provides that four of the seven members (and therefore four of the seven trustees) will be Princeton officials or appointees. The remaining three members and trustees are "family members" appointed by or through the Robertson family. Under the above provisions the Board of Trustees which operates and manages the Foundation has been and is controlled by Princeton University.

Since the Foundation is controlled by Princeton University through its control of the Board of Trustees it is not controlled directly or indirectly by one or more disqualified persons within the meaning of section 509(a)(3)(c).

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