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FORM LM-2 LABOR ORGANIZATION ANNUAL REPORT

U.S. Department of Labor
Office of Labor-Management Standards
Washington, DC 20210

MUST BE USED BY LABOR ORGANIZATIONS WITH \$250,000 OR MORE IN TOTAL ANNUAL RECEIPTS AND LABOR ORGANIZATIONS IN TRUSTEESHIP

Form Approved
Office of Management and Budget
No. 1245-0003
Expires: 10-31-2013

This report is mandatory under P.L. 86-257, as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C. 439 or 440.

READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

For Official Use Only	1. FILE NUMBER 515-617	2. PERIOD COVERED From 07/01/2010 Through 06/30/2011	3. (a) AMENDED - Is this an amended report: No (b) HARDSHIP - Filed under the hardship procedures: No (c) TERMINAL - This is a terminal report: No
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4. AFFILIATION OR ORGANIZATION NAME SHEET METAL WORKERS AFL-CIO		8. MAILING ADDRESS (Type or print in capital letters)	
		First Name J. SCOTT	Last Name PARKS
5. DESIGNATION (Local, Lodge, etc.) LOCAL UNION	6. DESIGNATION NBR 20	P.O Box - Building and Room Number P.O. BOX 20530	
7. UNIT NAME (if any)		Number and Street 2828 E. 45TH STREET	
9. Are your organization's records kept at its mailing address? Yes		City INDIANAPOLIS	
		State IN	ZIP Code + 4 462200530

Each of the undersigned, duly authorized officers of the above labor organization, declares, under penalty of perjury and other applicable penalties of law, that all of the information submitted in this report (including information contained in any accompanying documents) has been examined by the signatory and is, to the best of the undersigned individual's knowledge and belief, true, correct and complete (See Section V on penalties in the instructions.)

26. SIGNED: Michael T Wilber Date: Sep 27, 2011	PRESIDENT	27. SIGNED: James S Parks Date: Sep 27, 2011	FINL SECY-TREASURER
Contact Info: 260-478-1614		Contact Info: 317-549-6013	

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ITEMS 10 THROUGH 21

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10. During the reporting period did the labor organization create or participate in the administration of a trust or a fund or organization, as defined in the instructions, which provides benefits for members or beneficiaries? Yes

11(a). During the reporting period did the labor organization have a political action committee (PAC) fund? Yes

11(b). During the reporting period did the labor organization have a subsidiary organization as defined in Section X of these Instructions? No

12. During the reporting period did the labor organization have an audit or review of its books and records by an outside accountant or by a parent body auditor/representative? Yes

13. During the reporting period did the labor organization discover any loss or shortage of funds or other assets? (Answer "Yes" even if there has been repayment or recovery.) No

14. What is the maximum amount recoverable under the labor organization's fidelity bond for a loss caused by any officer, employee or agent of the labor organization who handled union funds? \$500,000

15. During the reporting period did the labor organization acquire or dispose of any assets in a manner other than purchase or sale? Yes

16. Were any of the labor organization's assets pledged as security or encumbered in any way at the end of the reporting period? No

17. Did the labor organization have any contingent liabilities at the end of the reporting period? Yes

18. During the reporting period did the labor organization have any changes in its constitution or bylaws, other than rates of dues and fees, or in practices/procedures listed in the instructions? No

19. What is the date of the labor organization's next regular election of officers? 06/2013

20. How many members did the labor organization have at the end of the reporting period? 4,173

21. What are the labor organization's rates of dues and fees?

Rates of Dues and Fees					
Dues/Fees	Amount		Unit	Minimum	Maximum
(a) Regular Dues/Fees	\$68.00	per	MONTH	N/A	N/A
(b) Working Dues/Fees	3%	per	OF TOTAL PACKAGE	N/A	N/A
(c) Initiation Fees	N/A	per	NEW MEMBER	\$50	\$500
(d) Transfer Fees	\$1.00	per	MEMBER	N/A	N/A
(e) Work Permits	N/A	per	N/A	N/A	N/A

STATEMENT A - ASSETS AND LIABILITIES

FILE NUMBER: 515-617

	ASSETS	Schedule	Start of Reporting	End of Reporting Period
		Number	Period (A)	(B)
	22. Cash		\$632,731	\$1,765,495
	23. Accounts Receivable	1	\$4,930	\$2,449
	24. Loans Receivable	2	\$0	\$0
	25. U.S. Treasury Securities		\$0	\$0
	26. Investments	5	\$437,576	\$437,576
	27. Fixed Assets	6	\$179,381	\$141,925
	28. Other Assets	7	\$0	\$0
	29. TOTAL ASSETS		\$1,254,618	\$2,347,445

	LIABILITIES	Schedule	Start of Reporting	End of Reporting Period
		Number	Period (A)	(B)
	30. Accounts Payable	8	\$0	\$0
	31. Loans Payable	9	\$0	\$0
	32. Mortgages Payable		\$0	\$0
	33. Other Liabilities	10	\$16,033	\$20,292
	34. TOTAL LIABILITIES		\$16,033	\$20,292

	35. NET ASSETS		\$1,238,585	\$2,327,153
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STATEMENT B - RECEIPTS AND DISBURSEMENTS

FILE NUMBER: 515-617

CASH RECEIPTS		SCH	AMOUNT	CASH DISBURSEMENTS		SCH	AMOUNT
36. Dues and Agency Fees			\$2,648,826	50. Representational Activities		15	\$1,520,052
37. Per Capita Tax			\$0	51. Political Activities and Lobbying		16	\$282,302
38. Fees, Fines, Assessments, Work Permits			\$3,606,436	52. Contributions, Gifts, and Grants		17	\$10,759
39. Sale of Supplies			\$4,435	53. General Overhead		18	\$3,019
40. Interest			\$14,028	54. Union Administration		19	\$930,035
41. Dividends			\$3,269	55. Benefits		20	\$821,551
42. Rents			\$13,633	56. Per Capita Tax			\$1,552,031
43. Sale of Investments and Fixed Assets	3		\$8,850	57. Strike Benefits			\$0
44. Loans Obtained	9		\$0	58. Fees, Fines, Assessments, etc.			\$0
45. Repayments of Loans Made	2		\$0	59. Supplies for Resale			\$5,405
46. On Behalf of Affiliates for Transmittal to Them			\$0	60. Purchase of Investments and Fixed Assets		4	\$1,189
47. From Members for Disbursement on Their Behalf			\$0	61. Loans Made		2	\$0
48. Other Receipts	14		\$152,918	62. Repayment of Loans Obtained		9	\$0
49. TOTAL RECEIPTS			\$6,452,395	63. To Affiliates of Funds Collected on Their Behalf			\$0
				64. On Behalf of Individual Members			\$0
				65. Direct Taxes			\$197,548
				66. Subtotal			\$5,323,891
				67. Withholding Taxes and Payroll Deductions			
				67a. Total Withheld		\$634,455	
				67b. Less Total Disbursed		\$630,195	
				67c. Total Withheld But Not Disbursed			\$4,260
				68. TOTAL DISBURSEMENTS			\$5,319,631

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SCHEDULE 1 - ACCOUNTS RECEIVABLE AGING SCHEDULE

FILE NUMBER: 515-617

Entity or Individual Name (A)	Total Account Receivable (B)	90-180 Days Past Due (C)	180+ Days Past Due (D)	Liquidated Account Receivable (E)
NONE ITEMIZED	\$0	\$0	\$0	\$0
Totals from all other accounts receivable	\$2,449	\$0	\$0	\$0
TOTALS (Column (B) Total will be automatically entered in Item 23, Column (B))	\$2,449	\$0	\$0	\$0

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SCHEDULE 2 - LOANS RECEIVABLE

FILE NUMBER: 515-617

List below loans to officers, employees, or members which at any time during the reporting period exceeded \$250 and list all loans to business enterprises regardless of amount. (A)	Loans Outstanding at Start of Period (B)	Loans Made During Period (C)	Cash (D)(1)	Other Than Cash (D)(2)	Loans Outstanding at End of Period (E)
Name: NONE Purpose: N/A Security: N/A Terms: N/A	\$0	\$0	\$0	\$0	\$0
Total of loans not listed above	\$0	\$0	\$0	\$0	\$0
Total of all lines	\$0	\$0	\$0	\$0	\$0
Totals will be automatically entered in...	Item 24 Column (A)	Item 61	Item 45	Item 69 with Explanation	Item 24 Column (B)

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SCHEDULE 3 - SALE OF INVESTMENTS AND FIXED ASSETS

FILE NUMBER: 515-617

Description (if land or buildings give location) (A)	Cost (B)	Book Value (C)	Gross Sales Price (D)	Amount Received (E)
AUTOMOBILE	\$31,851	\$0	\$8,850	\$8,850
Total of all lines	\$31,851	\$0	\$8,850	\$8,850
			14. Less Reinvestments	\$0
			(Net Sales total will automatically entered in Item 43) 15. Net Sales	\$8,850

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SCHEDULE 4 - PURCHASE OF INVESTMENTS AND FIXED ASSETS

FILE NUMBER: 515-617

Description (if land or buildings, give location) (A)	Cost (B)	Book Value (C)	Cash Paid (D)
OFFICE FURNITURE AND EQUIPMENT	\$1,189	\$1,189	\$1,189
Total of all lines	\$1,189	\$1,189	\$1,189
		14. Less Reinvestments	\$0
(Net Purchases total will automatically entered in Item 60)		15. Net Purchases	\$1,189

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SCHEDULE 5 - INVESTMENTS

FILE NUMBER: 515-617

Description (A)	Amount (B)
Marketable Securities	
1. Total Cost	\$437,576
2. Total Book Value	\$437,576
3. List each marketable security which has a book value over \$5000 and exceeds 5% of Line 2.	
■ FEDERAL HOME LOAN MORTGAGE CORP. DUE 6/12/13	\$279,728
■ ISHARES MSCI EAFE INDEX FUND	\$28,133
■ ISHARES RUSSELL 1000 VALUE INDEX FUND	\$37,518
■ ISHARES RUSSELL 1000 GROWTH INDEX FUND	\$32,329
Other Investments	
4. Total Cost	\$0
5. Total Book Value	\$0
6. List each other investment which has a book value over \$5,000 and exceeds 5% of Line 5. Also, list each subsidiary for which separate reports are attached.	
■ N/A	\$0
7. Total of Lines 2 and 5 (Total will be automatically entered in Item 26, Column(B))	\$437,576

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SCHEDULE 6 - FIXED ASSETS

FILE NUMBER: 515-617

Description (A)	Cost or Other Basis (B)	Total Depreciation or Amount Expensed (C)	Book Value (D)	Value (E)
1. 2828 E. 45TH ST. INDIANAPOLIS, IN.	\$5,000		\$5,000	\$5,000
1. 1485 ETNA AVE. HUNTINGTON, IN.	\$6,500		\$6,500	\$6,500
3. 2828 E. 45TH ST. INDIANAPOLIS, IN.	\$374,443	\$277,176	\$97,267	\$374,443
3. 1485 ETNA AVE. HUNTINGTON, IN.	\$53,699	\$50,740	\$2,959	\$53,699
5. Automobiles and Other Vehicles	\$320,529	\$306,772	\$13,757	\$13,757
6. Office Furniture and Equipment	\$434,215	\$417,773	\$16,442	\$16,442
7. Other Fixed Assets	\$0	\$0	\$0	\$0
8. Totals of Lines 1 through 7 (Column(D) Total will be automatically entered in Item 27, Column(B))	\$1,194,386	\$1,052,461	\$141,925	\$469,841

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SCHEDULE 7 - OTHER ASSETS

FILE NUMBER: 515-617

Description (A)	Book Value (B)
NONE	\$0
Total Other Assets (Total will be automatically entered in Item 28, Column(B))	\$0

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SCHEDULE 8 - ACCOUNTS PAYABLE AGING SCHEDULE

FILE NUMBER: 515-617

Entity or Individual Name (A)	Total Account Payable (B)	90-180 Days Past Due (C)	180+ Days Past Due (D)	Liquidated Account (E)
NONE	\$0	\$0	\$0	\$0
Total from all other accounts payable	\$0	\$0	\$0	\$0
Total Accounts Payable (Column(B) Total will be automatically entered in Item 30, Column(D))	\$0	\$0	\$0	\$0

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SCHEDULE 9 - LOANS PAYABLE

FILE NUMBER: 515-617

Source of Loans Payable at Any Time During the Reporting Period (A)	Loans Owed at Start of Period (B)	Loans Obtained During Period (C)	Repayment During Period Cash (D)(1)	Repayment During Period Other Than Cash (D)(1)	Loans Owed at End of Period (E)
NONE	\$0	\$0	\$0	\$0	\$0
Total Loans Payable	\$0	\$0	\$0	\$0	\$0
Totals will be automatically entered in...	Item 31 Column (C)	Item 44	Item 62	Item 69 with Explanation	Item 31 Column (D)

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SCHEDULE 10 - OTHER LIABILITIES

FILE NUMBER: 515-617

Description (A)	Amount at End of Period (B)
PAYROLL WITHHOLDINGS NOT REMITTED @ Y/E	\$13,719
STRIKE ASSISTANCE FROM INTERNATIONAL ASSOCIATION	\$6,573
Total Other Liabilities (Total will be automatically entered in Item 33, Column(D))	\$20,292

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SCHEDULE 11 - ALL OFFICERS AND DISBURSEMENTS TO OFFICERS

FILE NUMBER: 515-617

	(A) Name	(B) Title	(C) Status	(D) Gross Salary Disbursements (before any deductions)	(E) Allowances Disbursed	(F) Disbursements for Official Business	(G) Other Disbursements not reported in (D) thru (F)	(H) TOTAL		
A	J SCOTT PARKS									
B	BUS MGR/FINANCIAL S-T			\$94,397	\$1,200	\$10,425	\$0	\$106,022		
C										
I	Schedule 15 Representational Activities	50 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	50 %
A	JAY POTE STA									
B	BUS MGR/FINANCIAL S-T			\$3,583	\$0	\$1,690	\$0	\$5,273		
C										
I	Schedule 15 Representational Activities	22 %	Schedule 16 Political Activities and Lobbying	10 %	Schedule 17 Contributions	13 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	55 %
A	MICHAEL WILBER									
B	PRESIDENT/BUS REP			\$63,315	\$600	\$10,293	\$0	\$74,208		
C										
I	Schedule 15 Representational Activities	84 %	Schedule 16 Political Activities and Lobbying	2 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	14 %
A	DAVID PLATT									
B	PRESIDENT/BUS REP			\$736	\$0	\$1,434	\$0	\$2,170		
C										
I	Schedule 15 Representational Activities	70 %	Schedule 16 Political Activities and Lobbying	1 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	1 %	Schedule 19 Administration	28 %
A	BRAD CHAMNESS									
B	VICE PRESIDENT/BUS REP			\$59,667	\$1,200	\$6,923	\$0	\$67,790		
C										
I	Schedule 15 Representational Activities	65 %	Schedule 16 Political Activities and Lobbying	1 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	34 %
A	STEVEN NELSON									
B	RECORDING SEC/BUS REP			\$80,767	\$600	\$6,218	\$0	\$87,585		
C										
	Schedule 15		Schedule 16 Political		Schedule 17		Schedule 18		Schedule 19	

	Representational Activities	80 %	Activities and Lobbying	10 %	Contributions	0 %	General Overhead	1 %	Administration	9 %
A	CHARLES WILLIAMS									
B	EXECUTIVE BOARD			\$1,768	\$0	\$5		\$0	\$1,773	
C										
	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	SCOTT KONING									
B	EXECUTIVE BOARD			\$1,989	\$0	\$6		\$0	\$1,995	
C										
	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	KEVEN NEEDHAM									
B	EXECUTIVE BOARD			\$2,217	\$0	\$30		\$0	\$2,247	
C										
	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	SHAUN REINOEHL									
B	EXECUTIVE BOARD			\$1,879	\$0	\$24		\$0	\$1,903	
C										
	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	GREGORY HILL									
B	EXECUTIVE BOARD			\$1,780	\$0	\$6		\$0	\$1,786	
C										
	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	NICHOLUS ECKERT									
B	EXECUTIVE BOARD			\$1,787	\$0	\$66		\$0	\$1,853	
C	N									
	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	TIMOTHY MYRES									
B	EXECUTIVE BOARD			\$1,216	\$0	\$0		\$0	\$1,216	
C	N									

I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A B C	JOHN DENNIS EXECUTIVE BOARD N			\$2,112	\$0		\$16		\$0	\$2,128
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A B C	SHANNON CHAPPELL EXECUTIVE BOARD P			\$1,490	\$0		\$0		\$0	\$1,490
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A B C	DARRELL HICKMAN EXECUTIVE BOARD P			\$442	\$0		\$9		\$0	\$451
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A B C	SCOTT FISHER TRUSTEE C			\$1,878	\$0		\$6		\$0	\$1,884
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A B C	JOHN D WRIGHT TRUSTEE/BUS REP C			\$65,834	\$0		\$14,389		\$0	\$80,223
I	Schedule 15 Representational Activities	98 %	Schedule 16 Political Activities and Lobbying	1 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	1 %
A B C	BRIAN CLAWSON TRUSTEE N			\$2,124	\$0		\$54		\$0	\$2,178
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A B C	VERNON STONESTREET TRUSTEE N			\$1,105	\$0		\$0		\$0	\$1,105

C										
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	TIMOTHY TOLSON									
B	TRUSTEE		\$1,105		\$0		\$11		\$0	\$1,116
C	N									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	DUANE SMITH									
B	TRUSTEE		\$221		\$0		\$0		\$0	\$221
C	P									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	BENJAMIN BROWN									
B	CONDUCTOR		\$676		\$0		\$0		\$0	\$676
C	C									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	CHRISTOPHER STRIBY									
B	WARDEN		\$1,436		\$0		\$0		\$0	\$1,436
C	C									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A										
B										\$0
C	-1									
I	Schedule 15 Representational Activities		Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	
A										
B										\$0
C	-1									
I	Schedule 15 Representational Activities		Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	
A										
B										
C										
Total Officer Disbursements			\$393,524		\$3,600		\$51,605		\$0	\$448,729

Less Deductions					\$138,686
Net Disbursements					\$310,043

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SCHEDULE 12 - DISBURSEMENTS TO EMPLOYEES

FILE NUMBER: 515-617

	(A) Name	(B) Title	(C) Other Payer	(D) Gross Salary Disbursements (before any deductions)	(E) Allowances Disbursed	(F) Disbursements for Official Business	(G) Other Disbursements not reported in (D) thru (F)	(H) TOTAL		
A	JASON BENSON									
B	ORGANIZER			\$65,834	\$3,700	\$10,517	\$0	\$80,051		
C	NONE									
I	Schedule 15 Representational Activities	68 %	Schedule 16 Political Activities and Lobbying	7 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	25 %
A	ERIC CLAWSON									
B	BUSINESS REPRESENTATIVE			\$64,898	\$600	\$8,214	\$0	\$73,712		
C	NONE									
I	Schedule 15 Representational Activities	66 %	Schedule 16 Political Activities and Lobbying	11 %	Schedule 17 Contributions	3 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	20 %
A	DAVID JOHNSON									
B	BUSINESS REPRESENTATIVE			\$59,305	\$1,600	\$9,780	\$0	\$70,685		
C	NONE									
I	Schedule 15 Representational Activities	69 %	Schedule 16 Political Activities and Lobbying	10 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	3 %	Schedule 19 Administration	18 %
A	MICHAEL JONES									
B	BUSINESS REPRESENTATIVE			\$64,715	\$2,300	\$10,203	\$0	\$77,218		
C	NONE									
I	Schedule 15 Representational Activities	40 %	Schedule 16 Political Activities and Lobbying	15 %	Schedule 17 Contributions	1 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	44 %
A	GARY PIERSON									
B	BUSINESS REPRESENTATIVE			\$65,834	\$1,700	\$8,294	\$0	\$75,828		
C	NONE									
I	Schedule 15 Representational Activities	55 %	Schedule 16 Political Activities and Lobbying	29 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	16 %
A	JOHN QUINN									
B	ORGANIZER			\$59,667	\$1,900	\$9,662	\$0	\$71,229		
C	NONE									
I	Schedule 15 Representational Activities	79 %	Schedule 16 Political Activities and	12 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	9 %

		Lobbying								
A	MARK RILEY									
B	BUSINESS REPRESENTATIVE			\$59,305	\$0	\$10,583	\$0	\$69,888		
C	NONE									
I	Schedule 15 Representational Activities	46 %	Schedule 16 Political Activities and Lobbying	6 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	48 %
A	DAVID THOMAS									
B	BUSINESS REPRESENTATIVE			\$80,767	\$600	\$6,863	\$0	\$88,230		
C	NONE									
I	Schedule 15 Representational Activities	84 %	Schedule 16 Political Activities and Lobbying	2 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	14 %
A	TRENT TODD									
B	BUSINESS REPRESENTATIVE			\$65,834	\$300	\$13,059	\$0	\$79,193		
C	NONE									
I	Schedule 15 Representational Activities	77 %	Schedule 16 Political Activities and Lobbying	2 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	21 %
A	ELAINE AMMERMAN									
B	CLERICAL			\$37,385	\$0	\$0	\$0	\$37,385		
C	NONE									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	4 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	96 %
A	LYNN FARROW									
B	CLERICAL			\$41,185	\$0	\$2	\$0	\$41,187		
C	NONE									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	5 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	95 %
A	VICKI GRANT									
B	CLERICAL			\$41,556	\$0	\$1,006	\$0	\$42,562		
C	NONE									
I	Schedule 15 Representational Activities	12 %	Schedule 16 Political Activities and Lobbying	6 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	82 %
A	LINDA GRAY									
B	CLERICAL			\$37,783	\$0	\$37	\$0	\$37,820		
C	NONE									
	Schedule 15		Schedule 16				Schedule 18			

I	Representational Activities	0 %	Political Activities and Lobbying	8 %	Schedule 17 Contributions	0 %	General Overhead	0 %	Schedule 19 Administration	92 %
A	KAREN GRIMES									
B	CLERICAL			\$38,873	\$0		\$125		\$0	\$38,998
C	NONE									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	BARBARA HARTL									
B	CLERICAL			\$82,458	\$0		\$0		\$0	\$82,458
C	NONE									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	KATHLEEN KREUZMAN									
B	CLERICAL			\$54,313	\$0		\$36		\$0	\$54,349
C	NONE									
I	Schedule 15 Representational Activities	24 %	Schedule 16 Political Activities and Lobbying	15 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	61 %
A	LINDA MOFFETT									
B	CLERICAL			\$31,959	\$0		\$122		\$0	\$32,081
C	NONE									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	100 %
A	ANITA RICHARDS									
B	CLERICAL			\$35,472	\$0		\$0		\$0	\$35,472
C	NONE									
I	Schedule 15 Representational Activities	2 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	98 %
A	LINDA WESTBROOK									
B	CLERICAL			\$44,909	\$0		\$72		\$0	\$44,981
C	NONE									
I	Schedule 15 Representational Activities	0 %	Schedule 16 Political Activities and Lobbying	2 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	98 %
A	JACOB ROBERTSON									
B	APPRENTICE			\$25,383	\$0		\$582		\$0	\$25,965
C	NONE									

	Schedule 15 Representational Activities		Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	
I		23 %		77 %		0 %		0 %		0 %
A	RALPH DAVIS									
B	APPRENTICE			\$20,954	\$0	\$0	\$0	\$20,954		
C	NONE									
I		95 %		5 %		0 %		0 %		0 %
A	JAMIE CHARLES									
B	APPRENTICE			\$19,632	\$0	\$0	\$0	\$19,632		
C	NONE									
I		99 %		1 %		0 %		0 %		0 %
A	MICHAEL CARSON									
B	APPRENTICE			\$18,793	\$0	\$88	\$0	\$18,881		
C	NONE									
I		67 %		33 %		0 %		0 %		0 %
A	JONATHAN FISHERS									
B	APPRENTICE			\$18,442	\$0	\$0	\$0	\$18,442		
C	NONE									
I		100 %		0 %		0 %		0 %		0 %
A	BENJAMIN GATES									
B	APPRENTICE			\$16,518	\$0	\$613	\$0	\$17,131		
C	NONE									
I		83 %		17 %		0 %		0 %		0 %
A	BRUCE MCNEILL									
B	APPRENTICE			\$14,268	\$0	\$164	\$0	\$14,432		
C	NONE									
I		80 %		20 %		0 %		0 %		0 %
A	ROGER MITCHELL									
B	APPRENTICE			\$14,157	\$0	\$0	\$0	\$14,157		
C	NONE									

C										
I	Schedule 15 Representational Activities	99 %	Schedule 16 Political Activities and Lobbying	1 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	STEVEN MABUS									
B	APPRENTICE			\$13,406		\$0	\$0		\$0	\$13,406
C	NONE									
I	Schedule 15 Representational Activities	47 %	Schedule 16 Political Activities and Lobbying	53 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	MATTHEW LAWSON									
B	APPRENTICE			\$12,659		\$0	\$110		\$0	\$12,769
C	NONE									
I	Schedule 15 Representational Activities	73 %	Schedule 16 Political Activities and Lobbying	27 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	JOHN BURCHELL									
B	APPRENTICE			\$11,902		\$0	\$23		\$0	\$11,925
C	NONE									
I	Schedule 15 Representational Activities	79 %	Schedule 16 Political Activities and Lobbying	21 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	AARON VOLK									
B	APPRENTICE			\$11,888		\$0	\$0		\$0	\$11,888
C	NONE									
I	Schedule 15 Representational Activities	98 %	Schedule 16 Political Activities and Lobbying	2 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	MICHAEL WHITAKER									
B	APPRENTICE			\$11,219		\$0	\$0		\$0	\$11,219
C	NONE									
I	Schedule 15 Representational Activities	100 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	PAUL SKAGGS									
B	APPRENTICE			\$10,399		\$0	\$113		\$0	\$10,512
C	NONE									
I	Schedule 15 Representational Activities	79 %	Schedule 16 Political Activities and Lobbying	21 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	DUSTIN MOCK									
B	APPRENTICE			\$10,061		\$150	\$0		\$0	\$10,211

B	NONE									
C										
I	Schedule 15 Representational Activities	100 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
A	ANDREW LUBBEHUSEN									
B	APPRENTICE		\$9,955		\$150		\$0		\$0	\$10,105
C	NONE									
I	Schedule 15 Representational Activities	100 %	Schedule 16 Political Activities and Lobbying	0 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	0 %
TOTALS RECEIVED BY EMPLOYEES MAKING LESS THAN \$10000			\$318,731		\$2,070		\$2,529		\$0	\$323,330
I	Schedule 15 Representational Activities	80 %	Schedule 16 Political Activities and Lobbying	17 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	0 %	Schedule 19 Administration	3 %
Total Employee Disbursements			\$1,590,419		\$15,070		\$92,797		\$0	\$1,698,286
Less Deductions										\$495,769
Net Disbursements										\$1,202,517

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SCHEDULE 13 - MEMBERSHIP STATUS

FILE NUMBER: 515-617

Category of Membership (A)	Number (B)	Voting Eligibility (C)
JOURNEYMAN	1,871	Yes
APPRENTICE	295	Yes
PRE-APPRENTICE	62	Yes
RETIREE	1,076	Yes
LIMITED	5	No
CLASSIFIED	864	Yes
Members	4,173	
Agency Fee Payers*		
Total Members/Fee Payers	4,173	
*Agency Fee Payers are not considered members of the labor organization.		

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DETAILED SUMMARY PAGE - SCHEDULES 14 THROUGH 19

FILE NUMBER: 515-617

SCHEDULE 14 OTHER RECEIPTS	
1. Named Payer Itemized Receipts	\$88,550
2. Named Payer Non-itemized Receipts	\$42,930
3. All Other Receipts	\$21,438
4. Total Receipts	\$152,918

SCHEDULE 15 REPRESENTATIONAL ACTIVITIES	
1. Named Payee Itemized Disbursements	\$84,411
2. Named Payee Non-itemized Disbursements	\$163,859
3. To Officers	\$310,776
4. To Employees	\$918,203
5. All Other Disbursements	\$42,803
6. Total Disbursements	\$1,520,052

SCHEDULE 16 POLITICAL ACTIVITIES AND LOBBYING	
1. Named Payee Itemized Disbursements	\$5,000
2. Named Payee Non-itemized Disbursements	\$7,314
3. To Officers	\$12,272
4. To Employees	\$192,506
5. All Other Disbursements	\$65,210
6. Total Disbursement	\$282,302

SCHEDULE 17 CONTRIBUTIONS, GIFTS & GRANTS	
1. Named Payee Itemized Disbursements	\$0
2. Named Payee Non-itemized Disbursements	\$0
3. To Officers	\$685
4. To Employees	\$2,983
5. All Other Disbursements	\$7,091
6. Total Disbursements	\$10,759

SCHEDULE 18 GENERAL OVERHEAD	
1. Named Payee Itemized Disbursements	\$0
2. Named Payee Non-itemized Disbursements	\$0
3. To Officers	\$898
4. To Employees	\$2,121
5. All Other Disbursements	\$0
6. Total Disbursements	\$3,019

SCHEDULE 19 UNION ADMINISTRATION	
1. Named Payee Itemized Disbursements	\$54,507
2. Named Payee Non-itemized Disbursements	\$58,709
3. To Officers	\$124,100
4. To Employees	\$582,473
5. All Other Disbursements	\$110,246
6. Total Disbursements	\$930,035

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SCHEDULE 14 - OTHER RECEIPTS

FILE NUMBER: 515-617

Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
SHEET METAL WORKERS LOCAL NO. 204 1485 ETNA AVE. HUNTINGTON IN 46750	TRANSFER OF CASH DUE TO MERGER	04/01/2011	\$24,124
	Total Itemized Transactions		\$24,124
	Total Non-Itemized Transactions		
	Total of All Transactions		\$24,124
Type or Classification (B)	LOCAL UNION		
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
SMW INTERNATIONAL ASSOCIATION 1750 NEW YORK AVENUE NW WASHINGTON DC 20006	REIMBURSEMENT OF ORGANIZING EXPENSES	12/09/2010	\$6,357
	REIMBURSEMENT OF ORGANIZING EXPENSES	01/21/2011	\$5,567
	REIMBURSEMENT OF ORGANIZING EXPENSES	02/16/2011	\$5,567
	REIMBURSEMENT OF ORGANIZING EXPENSES	03/17/2011	\$5,567
	REIMBURSEMENT OF ORGANIZING EXPENSES	04/19/2011	\$5,567
	REIMBURSEMENT OF ORGANIZING EXPENSES	05/17/2011	\$5,567
	REIMBURSEMENT OF ORGANIZING EXPENSES	06/14/2011	\$5,567
	ASSAULT ON FAMILIES REIMBURSEMENT	06/30/2011	\$24,667
	Total Itemized Transactions		\$64,426
	Total Non-Itemized Transactions		\$24,944
	Total of All Transactions		\$89,370
Type or Classification (B)	INTERNATIONAL UNION - PARENT ORGANIZATION		
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
SMW LOCAL NO. 20 JATC 2828 E. 45TH STREET INDIANAPOLIS IN 46205	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$5,656
	Total of All Transactions		\$5,656
	Type or Classification (B)	SMW APPRENTICE & TRAINING COMMITTEE	
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
SMW LOCAL NO. 20 WELFARE AND BENEFIT FUND 2828 E. 45TH STREET INDIANAPOLIS IN 46205	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$12,330
	Total of All Transactions		\$12,330
Type or Classification (B)			

RELATED BENEFIT FUND	
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SCHEDULE 15 - REPRESENTATIONAL ACTIVITIES

FILE NUMBER: 515-617

Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
ACCIDENT FUND INSURANCE CO. OF AMERICA 770000 DETROIT MI 48277 Type or Classification (B) INSURANCE COMPANY	WORKMANS COMP PREMIUM	06/10/2011	\$26,651
	Total Itemized Transactions		\$26,651
	Total Non-Itemized Transactions		\$820
	Total of All Transactions		\$27,471
AT&T 9001309 LOUISVILLE KY 40290 Type or Classification (B) TELEPHONE COMPANY	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$14,809
	Total of All Transactions		\$14,809
FILLENWARTH, DENNERLINE, GROTH & TOWE, LLP. 429 E. VERMONT ST. STE 200 INDIANAPOLIS IN 46202 Type or Classification (B) LAW FIRM	GRIEVANCES, ARBITRATION ETC.	10/22/2010	\$5,666
	GRIEVANCES, ARBITRATION ETC.	01/28/2011	\$11,659
	Total Itemized Transactions		\$17,325
	Total Non-Itemized Transactions		\$8,002
	Total of All Transactions		\$25,327
GREGORY & APPEL 44944 1402 N. CAPITOL, STE 400 INDIANAPOLIS IN 46244 Type or Classification (B) INSURANCE COMPANY	MULTI PACKAGE PREMIUM RENEWAL	03/04/2011	\$6,121
	Total Itemized Transactions		\$6,121
	Total Non-Itemized Transactions		
	Total of All Transactions		\$6,121
HUMPHREY PRINTING CO. 315 N. MAIN ST. KOKOMO IN 46901 Type or Classification (B)	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$7,710
	Total of All Transactions		\$7,710

PRINTING COMPANY			
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
I.B.E.W. LOCAL 668 2535 S. 30TH STREET SUITE 1 LAFAYETTE IN 47905	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$5,220
	Total of All Transactions		\$5,220
	Type or Classification (B)	LANDLORD (RENT)	
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
INDUSTRIAL INFORMATION RESOURCES, INC. 42442 HOUSTON TX 77242	CONSTRUCTION MARKET DATABASE	06/24/2011	\$11,657
	Total Itemized Transactions		\$11,657
	Total Non-Itemized Transactions		
	Total of All Transactions		\$11,657
Type or Classification (B)	SUBSCRIPTION		
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
PITNEY BOWES, INC 856042 LOUISVILLE KY 40285	POSTAGE METER REFILL	12/03/2010	\$7,701
	Total Itemized Transactions		\$7,701
	Total Non-Itemized Transactions		\$39,800
	Total of All Transactions		\$47,501
Type or Classification (B)	POSTAGE		
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
SMW LOCAL NO. 20 JATC 2828 E. 45TH STREET INDIANAPOLIS IN 46205	REIMBURSEMENT OF MAINTENANCE, REPAIRS & SUPPLIES	11/12/2010	\$9,164
	Total Itemized Transactions		\$9,164
	Total Non-Itemized Transactions		\$38,991
	Total of All Transactions		\$48,155
Type or Classification (B)	SMW APPRENTICE & TRAINING COMMITTEE		
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
ST. JOSEPH VALLEY CO. BUILDING TRADES 1345 NORTHSIDE BOULEVARD SOUTH BEND IN 46615	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$12,371
	Total of All Transactions		\$12,371
Type or Classification (B)			

LANDLORD (RENT)			
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
STAPLES BUSINESS ADVANTAGE 83689 CHICAGO IL 60696 Type or Classification (B) OFFICE SUPPLIES COMPANY	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$11,177
	Total of All Transactions		\$11,177
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
THE BUREAU OF NATIONAL AFFAIRS, INC. 17009 BALTIMORE MD 21297 Type or Classification (B) SUBSCRIPTION	CONSTRUCTION, EMPLOYMENT AND UNION LABOR REPORT	01/28/2011	\$5,792
	Total Itemized Transactions		\$5,792
	Total Non-Itemized Transactions		\$2,640
	Total of All Transactions		\$8,432
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
U.S. POSTAL SERVICE 5101 INTERCHANGE WAY LOUISVILLE KY 40229 Type or Classification (B) POSTAGE	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$6,071
	Total of All Transactions		\$6,071
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
VERIZON 920041 DALLAS TX 75392 Type or Classification (B) TELEPHONE COMPANY	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$9,832
	Total of All Transactions		\$9,832
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
XEROX CAPITAL SERVICES, LLC 80255 CHICAGO IL 60680 Type or Classification (B)	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$6,416
	Total of All Transactions		\$6,416

OFFICE EQUIPMENT COMPANY

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SCHEDULE 16 - POLITICAL ACTIVITIES AND LOBBYING

FILE NUMBER 515-617

Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
INDIANA DEMOCRATIC PARTY ONE N. CAPITOL AVENUE INDIANAPOLIS IN 46204	TO CONTRIBUTE TO STATE AND LOCAL CANDIDATES	04/04/2011	\$5,000
Type or Classification (B) POLITICAL ORGANIZATION	Total Itemized Transactions		\$5,000
	Total Non-Itemized Transactions		
	Total of All Transactions		\$5,000
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
PITNEY BOWES, INC 856042 LOUISVILLE KY 40285	Total Itemized Transactions		
Type or Classification (B) POSTAGE	Total Non-Itemized Transactions		\$7,314
	Total of All Transactions		\$7,314

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SCHEDULE 17 - CONTRIBUTIONS, GIFTS & GRANTS

FILE NUMBER: 515-617

There was no data found for this schedule.

SCHEDULE 18 - GENERAL OVERHEAD

FILE NUMBER: 515-617

There was no data found for this schedule.

SCHEDULE 19 - UNION ADMINISTRATION

FILE NUMBER: 515-617

Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
AWARDS & T-SHIRT SPECIALISTS, INC. 10400 E. 63RD STREET RAYTOWN MO 64133	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$5,074
	Total of All Transactions		\$5,074
	Type or Classification (B)	PROMOTIONAL ITEMS SUPPLIER	
HYATT 650 15TH STREET DENVER CO 80202	CONFERENCE	10/08/2010	\$5,263
	Total Itemized Transactions		\$5,263
	Total Non-Itemized Transactions		\$1,114
	Total of All Transactions		\$6,377
	Type or Classification (B)	HOTEL	
JP MORGAN CHASE BANK 111 MONUMENT CIRCLE INDIANAPOLIS IN 46204	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$27,401
	Total of All Transactions		\$27,401
	Type or Classification (B)	FINANCIAL INSTITUTION	
LEGACY PROFESSIONALS LLP 222 INDIANAPOLIS BLVD 103 SCHERERVILLE IN 46375	ANNUAL AUDIT AND TAX RETURNS	10/01/2010	\$34,100
	Total Itemized Transactions		\$34,100
	Total Non-Itemized Transactions		\$2,000
	Total of All Transactions		\$36,100
	Type or Classification (B)	AUDIT AND ACCOUNTING FIRM	
Name and Address	Purpose	Date	Amount

(A)	(C)	(D)	(E)
MORGAN STANLEY SMITH BARNEY 800 EAST 96TH ST. STE 400 INDIANAPOLIS IN 46240 Type or Classification (B) INVESTMENT MANAGEMENT COMPANY	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$5,000
	Total of All Transactions		\$5,000
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
PITNEY BOWES, INC 856042 LOUISVILLE KY 40285 Type or Classification (B) POSTAGE	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$7,467
	Total of All Transactions		\$7,467
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
SMW LOCAL NO. 20 JATC 2828 E. 45TH STREET INDIANAPOLIS IN 46205 Type or Classification (B) SMW APPRENTICESHIP & TRAINING COMMITTEE	RENT AND REIMB OF BANQUET COSTS	01/07/2011	\$9,134
	Total Itemized Transactions		\$9,134
	Total Non-Itemized Transactions		\$10,653
	Total of All Transactions		\$19,787
Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
WHITE & HAVENS INSURANCE 1999 2809 HIGHWAY AVE. HIGHLAND IN 46322 Type or Classification (B) INSURANCE COMPANY	OFFICERS & DIRECTORS PREMIUM	03/25/2011	\$6,010
	Total Itemized Transactions		\$6,010
	Total Non-Itemized Transactions		\$0
	Total of All Transactions		\$6,010

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SCHEDULE 20 - BENEFITS

FILE NUMBER: 515-617

Description (A)	To Whom Paid (B)	Amount (C)
HEALTH AND WELFARE BENEFITS	TRUST	\$297,428
PENSION BENEFITS	TRUST	\$443,594
ANNUITY BENEFITS	TRUST	\$18,196
401K BENEFITS	TRUST	\$4,080
SEVERANCE BENEFITS	TRUST	\$41,253
DEATH BENEFITS	BENEFICIARIES OF MEMBERS	\$17,000
Total Benefits		\$821,551

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69. ADDITIONAL INFORMATION SUMMARY

FILE NUMBER: 515-617

Question 12: A FINANCIAL STATEMENT AUDIT WAS PERFORMED BY LEGACY PROFESSIONALS LLP.

Question 15: IT IS THE PRACTICE OF THE LOCAL UNION TO GIVE AWAY UNION IMPRINTED ITEMS OF MINIMAL COST SUCH AS JACKETS WITH A COST OF \$600, SHIRTS WITH A COST OF \$8,500, DOOR PRIZES & AWARDS WITH A COST OF \$2,300, HARD HAT DECALS/PENCILS WITH A COST OF \$1,250, POCKET CALANDARS WITH A COST OF \$1,170, RETIREMENT WATCHES WITH A COST OF \$200, SPORTING EVENT TICKETS WITH A COST OF \$4,780 TO MEMBERS TO ENCOURAGE ATTENDANCE AT UNION MEETINGS AND PARTICIPATION IN UNION ACTIVITIES. IT IS NOT PRACTICAL TO SPECIFICALLY IDENTIFY THE RECIPIENTS OF THESE ITEMS. DURING THE YEAR THE LOCAL DISPOSED OF FURNITURE AND EQUIPMENT WITH A COST OF \$6,679 WITH A BOOK VALUE OF \$0. NOTHING OF VALUE WAS RECEIVED AS A RESULT OF THE TRANSACTION.

Question 10: SHEET METAL WORKERS LOCAL UNION NO.20 WELFARE AND BENEFIT FUND 2828 EAST 45TH STREET INDIANAPOLIS, INDIANA 46205 FEIN 35-6028684 - PLAN #501 PROVIDES HEALTH AND WELFARE BENEFITS TO MEMBERS OR THEIR ELIGIBLE DEPENDENTS. SHEET METAL WORKERS LOCAL NO. 20 GARY AREA PENSION FUND 6450 AMERIPLEX DRIVE PORTAGE, INDIANA 46368 FEIN 35-6057213 - PLAN #001 PROVIDES RETIREMENT BENEFITS TO MEMBERS AND THEIR BENEFICIARIES. SHEET METAL WORKERS LOCAL NO. 20 INDIANAPOLIS AREA PENSION TRUST FUND 2828 EAST 45TH STREET INDIANAPOLIS, INDIANA 46205 FEIN 51-0168516 - PLAN #001 PROVIDES RETIREMENT BENEFITS TO MEMBERS OR THEIR BENEFICIARIES. SHEET METAL WORKERS LOCAL 20 SOUTH BEND AREA PENSION PLAN 1345 NORTHSIDE BOULEVARD SOUTH BEND, INDIANA 46615 FEIN 35-6054275 - PLAN #001 PROVIDES RETIREMENT BENEFITS TO MEMBERS OR THEIR BENEFICIARIES. SHEET METAL WORKERS LOCAL NO.20 APPRENTICESHIP & TRAINING TRUST 2828 EAST 45TH STREET INDIANAPOLIS, INDIANA 46205 FEIN 35-1154275 PROVIDES TRAINING TO APPRENTICES IN THE CRAFT OF SHEET METAL WORKING. SHEET METAL WORKERS LOCAL NO. 20 DEFINED CONTRIBUTION PENSION FUND 2828 EAST 45TH STREET INDIANAPOLIS, INDIANA 46205 FEIN 35-2062343 - PLAN #001 PROVIDES RETIREMENT BENEFITS TO MEMBERS OR THEIR BENEFICIARIES.

Question 11(a): LOCAL 20 POLITICAL EXPENDITURE FUND - THIS FUND IS NOT REQUIRED TO FILE REPORTS WITH ANY STATE OR FEDERAL GOVERNMENTAL AGENCIES. THE FINANCIAL ACTIVITIES OF THIS FUND ARE REPORTED IN THIS LM-2 FILING. LOCAL 20 VOLUNTARY POLITICAL ACTION FUND - THIS FUND FILES RECEIPTS AND EXPENDITURES REPORT WITH THE INDIANA STATE ELECTION BOARD. THEREFORE, THE FINANCIAL ACTIVITIES OF THIS FUND ARE NOT INCLUDED IN THIS LM-2 FILING.

Question 17: THE LOCAL OFFERS TO ITS MEMBERS VOLUNTARY PARTICIPATION IN PROVIDING A \$1,000 DEATH BENEFIT TO BENEFICIARIES OF DECEASED MEMBERS. THE LOCAL ASSESSES ALL ACTIVELY PARTICIPATING MEMBERS IN ORDER TO FUND THE PAYMENT OF DEATH BENEFITS. AT JUNE, 30 2011 THERE WERE 324 ACTIVELY PARTICIPATING MEMBERS. SCHEDULES 11 AND 12 - ALL OFFICERS AND DISBURSEMENTS TO OFFICERS AND DISBURSEMENTS TO EMPLOYEES: IT IS NOT PRACTICAL TO MAKE A PRECISE DISTRIBUTION OF AUTOMOBILE OPERATING EXPENSES NOT PAID DIRECTLY TO OFFICERS AND EMPLOYEES AND INCLUDED IN COLUMNS (F) AND (G). HOWEVER, AN ALLOCATION OF SUCH EXPENSES HAS BEEN MADE IN ACCORDANCE WITH IRS REPORTING RULES. IF UNION OWNED/LEASED AUTOMOBILES WERE USED 50% OR LESS FOR BUSINESS PURPOSES BY IRS REPORTING STANDARDS, THE REMAINDER IS TREATED AS IF IT WERE PERSONAL USE AND IS REPORTED IN COLUMN (G). IRS STANDARDS SHOULD NOT NECESSARILY BE CONSIDERED AS THE ACTUAL BUSINESS USE OF AN AUTOMOBILE. SCHEDULE 11 - ALL OFFICERS AND DISBURSEMENTS TO OFFICERS: AS A RESULT OF THE ELECTION IN JUNE 2010 THERE WERE NEW OFFICERS THAT TOOK THEIR POSITIONS EFFECTIVE IN JULY 2010. SCHEUDLE 6 - FIXED ASSETS, COLUMN C - AMOUNT EXPENSED AND COLUMN E - FAIR VALUE THE LOCAL HAS NO POLICY FOR PERIODICALLY APPRAISING ITS ASSETS TO DETERMINE THEIR FAIR VALUE. THE COST OF THE LOCALS LAND AND BUILDINGS AND IMPROVEMENTS HAS BEEN REPORTED AS A GOOD FAITH ESTIMATE OF THEIR FAIR VALUE. THE BOOK VALUE OF THE LOCALS REMAINING ASSETS HAVE BEEN REPORTED AS A GOOD FAITH ESTIMATE OF THEIR FAIR VALUE. DEPRECIATION EXPENSE: \$ 9,698 BUILDING AND IMPROVEMENTS \$29,025 AUTOMOBILES \$ 9,991 OFFICE FURNITURE AND EQUIPMENT \$48,714 TOTAL DURING THE CURRENT REPORTING PERIOD, SHEET METAL WORKERS LOCAL UNION NO. 204 (LOCAL UNION 204) WAS MERGED INTO THE LOCAL. THE EFFECTIVE DATE OF THE MERGER WAS APRIL 1, 2011. AS A RESULT, THE ASSETS AND LIABILITIES OF LOCAL UNION 204 WERE TRANSFERRED TO THE LOCAL. THE ASSETS AND LIABILITIES TRANSFERRED TO THE LOCAL EFFECTIVE APRIL 1, 2011 ARE AS FOLLOWS: CASH: \$24,124 (REPORTED ON SCHEDULE 14 OF LM-2) LAND: 6,500 BUILDINGS/IMPROVEMENTS - NET: 3,569 OTHER ASSETS: 869 OTHER LIABILITIES: 543 NET ASSETS TRANSFERRED 34,519 ITEM 64 - ON BEHALF OF INDIVIDUAL MEMBERS: THIS ITEM REFLECTS ONLY DISBURSEMENTS ON BEHALF OF INDIVIDUAL MEMBERS FOR OTHER THAN NORMAL OPERATING PURPOSES. ALL OF OUR EXPENSES BENEFIT THE ENTIRE UNION MEMBERSHIP AND INDIVIDUALS ARE NOT NORMALLY SINGLED OUT FOR SPECIAL PURPOSES.

Schedule 13, Row1: A JOURNEYMAN IS A MEMBER THAT HAS ATTAINED, THROUGH AN APPRENTICESHIP PROGRAM, OR POSSESSES THE HIGHEST QUALITY SKILLS NECESSARY TO PERFORM SHEET METAL WORK IN THE SHEET METAL TRADE. A JOURNEYMAN PAYS FULL DUES. A JOURNEYMAN HAS FULL VOTING RIGHTS AS LONG AS THE JOURNEYMAN IS A GOOD STANDING MEMBER IN THE LOCAL AT THE TIME OF VOTING.

Schedule 13, Row2:AN APPRENTICE MEMBER IS A MEMBER IN TRAINING LEARNING THE HIGHEST QUALITY SKILLS NECESSARY TO PERFORM WORK IN THE SHEET METAL TRADE. UPON SUCCESSFUL COMPLETION OF THE TRAINING PROGRAM JOURNEYMAN CERTIFICATION STATUS IS AWARDED. APPRENTICES PAY FULL DUES. AN APPRENTICE HAS FULL VOTING RIGHTS AS LONG AS THE APPRENTICE MEMBER IS A GOOD STANDING MEMBER IN THE LOCAL AT THE TIME OF VOTING.

Schedule 13, Row3:A PRE-APPRENTICE MEMBER IS AN UNSKILLED MEMBER AND PERFORMS WORK WHICH THEY ARE CAPABLE OF AND WORKS UNDER THE DIRECTION OF A JOURNEYMAN. PRE-APPRENTICES PAY A REDUCED AMOUNT OF DUES TO MAINTAIN MEMBERSHIP IN THE LOCAL. A PRE-APPRENTICE HAS FULL VOTING RIGHTS AS LONG AS THE PRE-APPRENTICE IS A GOOD STANDING MEMBER IN THE LOCAL AT THE TIME OF VOTING. AFTER TWO YEARS, THE PRE-APPRENTICE MEMBER MUST EITHER ENTER INTO THE APPRENTICESHIP PROGRAM OR BECOME A CLASSIFIED WORKER.

Schedule 13, Row4:A RETIREE IS A MEMBER THAT GENERALLY NO LONGER WORKS IN THE SHEET METAL TRADE. RETIRED MEMBERS PAY A REDUCED AMOUNT OF DUES TO MAINTAIN MEMBERSHIP IN THE LOCAL. A RETIRED MEMBER HAS FULL VOTING RIGHTS AS LONG AS THE RETIREE IS A MEMBER IN GOOD STANDING IN THE LOCAL AT THE TIME OF VOTING.

Schedule 13, Row5:A LIMITED MEMBER IS A MEMBER THAT HAS REDUCED EARNING CAPACITY AND HAS BEEN IN GOOD STANDING AS A MEMBER FOR OVER 25 YEARS. LIMITED MEMBERS PAY A REDUCED AMOUNT OF DUES TO MAINTAIN MEMBERSHIP IN THE LOCAL. A LIMITED MEMBER HAS NO VOTING RIGHTS.

Schedule 13, Row6:A CLASSIFIED IS A MEMBER THAT IS UNSKILLED AND PERFORMS ANY WORK WHICH THEY ARE CAPABLE OF AND WORKS UNDER THE DIRECTION OF A JOURNEYMAN. A CLASSIFIED MEMBER PAYS A REDUCED AMOUNT OF DUES TO MAINTAIN MEMBERSHIP IN THE LOCAL. A CLASSIFIED MEMBER HAS FULL VOTING RIGHTS AS LONG AS THE CLASSIFIED MEMBER IS A MEMBER IN GOOD STANDING IN THE LOCAL AT THE TIME OF VOTING.

Schedule 13, Row5:A LIMITED MEMBER HAS NO VOTING RIGHTS PER CONSTITUTION AND BYLAWS.Item 71 Title: THE CONSTITUTION AND RITUAL PROVIDES THAT THE CHIEF FINANCIAL OFFICER OF THIS LOCAL IS THE FINANCIAL SECRETARY-TREASURER.

Form LM-2 (Revised 2010)