



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form 990-EZ

Short Form

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)

- Sponsoring organizations and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$1,000,000 and total assets less than \$2,500,000 at the end of the year may use this form
- The organization may have to use a copy of this return to satisfy state reporting requirements.

2008

Open to Public
InspectionDepartment of the Treasury
Internal Revenue Service

A For the 2008 calendar year, or tax year beginning 07-01-2008

, and ending 06-30-2009

B Check if applicable

- Address change
- Name change
- Initial return
- Termination
- Amended return
- Application pending

Please use IRS label or print or type.
See Specific Instructions.

| | |
|---|--|
| C Name of organization Rotary International - Westerville Sunrise Rotary Club | D Employer identification number 31-1426601 |
| Number and street (or P O box, if mail is not delivered to street address) PO Box 1200 | E Telephone number (614) 901-7100 |
| City or town, state or country, and ZIP + 4 Westerville, OH 43086 | F Group Exemption Number ► 0573 |

► Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts
must attach a completed Schedule A (Form 990 or 990-EZ).

I Website: ► www.westervillerotary.orgJ Organization type (check only one) — 501(c) (4) (insert no) 4947(a)(1) or 527K Check ► if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$1,000,000 or more, file Form 990 instead of Form 990-EZ ► \$ 39,271

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I)

| | | | |
|----|--|----|--------|
| 1 | Contributions, gifts, grants, and similar amounts received | 1 | 2,230 |
| 2 | Program service revenue including government fees and contracts | 2 | |
| 3 | Membership dues and assessments | 3 | 36,768 |
| 4 | Investment income | 4 | 273 |
| 5a | Gross amount from sale of assets other than inventory | 5a | |
| b | Less cost or other basis and sales expenses | 5b | 0 |
| c | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule) | | |
| 6 | Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ► | 6c | 0 |
| a | Gross revenue (not including \$ _____ of contributions reported on line 1) | 6a | 0 |
| b | Less direct expenses other than fundraising expenses | 6b | 0 |
| c | Net income or (loss) from special events and activities (Subtract line 6b from line 6a) | | |
| 7a | Gross sales of inventory, less returns and allowances | 7a | |
| b | Less cost of goods sold | 7b | 0 |
| c | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) | | |
| 8 | Other revenue (describe ►) | 8 | |
| 9 | Total revenue (add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8) ► | 9 | 39,271 |
| 10 | Grants and similar amounts paid (attach schedule) | 10 | |
| 11 | Benefits paid to or for members | 11 | |
| 12 | Salaries, other compensation, and employee benefits | 12 | |
| 13 | Professional fees and other payments to independent contractors | 13 | |
| 14 | Occupancy, rent, utilities, and maintenance | 14 | 19,525 |
| 15 | Printing, publications, postage, and shipping | 15 | 25 |
| 16 | Other expenses (describe ►) | 16 | 22,061 |
| 17 | Total expenses (add lines 10 through 16) ► | 17 | 41,611 |
| 18 | Excess or (deficit) for the year (Subtract line 17 from line 9) | 18 | -2,340 |
| 19 | Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) | 19 | 13,571 |
| 20 | Other changes in net assets or fund balances (attach explanation) ► | 20 | -570 |
| 21 | Net assets or fund balances at end of year (combine lines 18 through 20) ► | 21 | 10,661 |

Part II Balance Sheets—If Total assets on line 25, column (B) are \$2,500,000 or more, file Form 990 instead of Form 990-EZ

| (See the instructions for Part II) | | (A) Beginning of year | (B) End of year |
|------------------------------------|--|-----------------------|-----------------|
| 22 | Cash, savings, and investments | 23,572 | 22 |
| 23 | Land and buildings | | 23 |
| 24 | Other assets (describe ►) | 2,950 | 24 |
| 25 | Total assets | 26,522 | 25 |
| 26 | Total liabilities (describe ►) | 12,951 | 26 |
| 27 | Net assets or fund balances (line 27 of column (B) must agree with line 21) | 13,571 | 27 |
| | | | 10,661 |

| Part III Statement of Program Service Accomplishments (See the instructions for Part III) | | | | Expenses (Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts, optional for others) |
|---|---|---|--|---|
| <p>What is the organization's primary exempt purpose?</p> <p>The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster First The development of acquaintance as an opportunity for service Second High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying by each Rotarian's occupation as an opportunity to serve society Third The application of the ideal of service in each Rotarian's personal, business, and community life Fourth The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service</p> | | | | |
| <p>Describe what was achieved in carrying out the organization's exempt purposes In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each program title</p> | | | | |
| 28 The Club has roughly 80 members who, as a business community, are giving back by participating in the Club's program's and by providing leadership to the community at large The expenses primarily represent administrative expenses and costs related to membership and fellowship activities (Grants \$ 41,611) | If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | 28a | |
| 29 | | | 29a | |
| (Grants \$) | If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | 29a | |
| 30 | | | 30a | |
| (Grants \$) | If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | 30a | |
| 31 Other program services (attach schedule) (Grants \$) | If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | 31a | |
| 32 Total program service expenses (add lines 28a through 31a) | ► <input type="checkbox"/> | | 32 | 41,611 |
| Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated (See the instructions for Part IV) | | | | |
| (a) Name and address | (b) Title and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-.) | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
| See Additional Data Table | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Part V Other Information (Note the statement requirements in the instructions for Part VI.) | | | Yes | No |
|---|------------|-----------------|------------|-----------|
| 33 Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity | 33 | | No | |
| 34 Were any changes made to the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes | 34 | | No | |
| 35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T | | | | |
| a Did the organization have unrelated business gross income of \$1,000 or more or 6033(e) notice, reporting, and proxy tax requirements? | 35a | | No | |
| b If "Yes," has it filed a tax return on Form 990-T for this year? | 35b | | | |
| 36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N | 36 | | No | |
| 37a Enter amount of political expenditures, direct or indirect, as described in the instructions ► 37a | 37a | | | |
| b Did the organization file Form 1120-POL for this year? | 37b | | No | |
| 38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return? | 38a | | No | |
| b If "Yes," complete Schedule L, Part II and enter the total amount involved | 38b | | | |
| 39 <i>501(c)(7) organizations.</i> Enter | 39a | 0 | | |
| a Initiation fees and capital contributions included on line 9 | 39a | 0 | | |
| b Gross receipts, included on line 9, for public use of club facilities | 39b | 0 | | |
| 40a <i>Section 501(c)(3) organizations.</i> Enter amount of tax imposed on the organization during the year under section 4911 ► _____, section 4912 ► _____, section 4955 ► _____ | 40b | | No | |
| b <i>Section 501(c)(3) and (4) organizations.</i> Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," complete Schedule L, Part I. | 40b | | No | |
| c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ► _____ | | | | |
| d Enter amount of tax on line 40c reimbursed by the organization ► _____ | | | | |
| e <i>All organizations.</i> At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? | 40e | | No | |
| 41 List the states with which a copy of this return is filed ► _____ | | | | |
| 42a The books are in care of ► Heather L Lynch Telephone no ► (614) 901-7100 | | | | |
| Located at ► 1232 Chatham Ridge Rd Westerville, OH | | ZIP + 4 ► 43081 | | |
| b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | 42b | | No | |
| If "Yes," enter the name of the foreign country ► _____ | | | | |
| See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts. | | | | |
| c At any time during the calendar year, did the organization maintain an office outside of the U S? | 42c | | No | |
| If "Yes," enter the name of the foreign country ► _____ | | | | |
| 43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here ► <input checked="" type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ► 43 | 43 | | | |
| 44 Did the organization maintain any donor advised funds? If "Yes", Form 990 must be completed instead of Form 990-EZ. | 44 | | No | |
| 45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes", Form 990 must be completed instead of Form 990-EZ. | 45 | | No | |

Part VI Section 501(c)(3) organizations only. All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51.

| | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|--|------------------------------|-----------------------------|
| 46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | 46 | |
| 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II | 47 | |
| 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "yes," complete Schedule E | 48 | |
| 49a Did the organization make any transfers to an exempt non-charitable related organization? | 49a | |
| b If "Yes," was the related organization(s) a section 527 organization? | 49b | |

50 Complete this table for the five highest compensated employees (other than officers, directors, trustees, and key employees) who received more than \$100,000 of compensation from the organization. If there are none, enter "None."

| (a) Name and address of each employee paid more than \$100,000 | (b) Title and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
|---|---|-------------------------|--|---|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total number of other employees paid over \$100,000 ► | | | | |

51 Complete this table for the five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there are none, enter "None."

| (a) Name and address of each independent contractor paid more than \$100,000 | (b) Type of service | (c) Compensation |
|---|----------------------------|-------------------------|
| NONE | | |
| | | |
| | | |
| | | |
| Total number of other independent contractors receiving over \$100,000 ► | | |

| | | | |
|---------------------------------|--|---|---|
| Please Sign Here | Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge | | |
| | ***** Signature of officer Heather Lynch Vice President Type or print name and title | 2010-05-13 Date | |
| Paid Preparer's Use Only | Preparer's signature ► | Date | Check if self-employed ► <input type="checkbox"/> |
| | Firm's name (or yours if self-employed), address, and ZIP + 4 ► | Preparer's PTIN (See Gen Inst X) EIN ► Phone no ► | |

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

Additional Data

Software ID:
Software Version:
EIN: 31-1426601
Name: Rotary International - Westerville
Sunrise Rotary Club

Form 990EZ, Part IV - List of Officers, Directors, Trustees, and Key Employees

| (A) Name and address | (B) Title and average hours per week devoted to position | (C) Compensation (If not paid, enter -0-.) | (D) Contributions to employee benefit plans & deferred compensation | (E) Expense account and other allowances |
|--|--|--|---|--|
| Julie Friend PO Box 1200 Westerville, OH 430861200 | Secretary 0 | 0 | | |
| Walter Lundstrom PO Box 1200 Westerville, OH 430861200 | President Elect 0 | 0 | | |
| Pat Kemmer PO Box 1200 Westerville, OH 430861200 | Director 0 | 0 | | |
| Renee Kropat PO Box 1200 Westerville, OH 430861200 | Sergeant-At-Arm 0 | 0 | | |
| Mark Kelly PO Box 1200 Westerville, OH 430861200 | Director 0 | 0 | | |
| Marc Hogenbirk PO Box 1200 Westerville, OH 430861200 | Director 0 | 0 | | |
| Jeff Barstow PO Box 1200 Westerville, OH 430861200 | Director 0 | 0 | | |
| Larry Jenkins PO Box 1200 Westerville, OH 430861200 | President 0 | 0 | | |
| Pat Knott PO Box 1200 Westerville, OH 430861200 | Vice President 0 | 0 | | |
| Heather Linch PO Box 1200 Westerville, OH 430861200 | Treasurer 0 | 0 | | |
| Bob Horbatt PO Box 1200 Westerville, OH 430861200 | Past President 0 | 0 | | |
| Jeff Daniels PO Box 1200 Westerville, OH 430861200 | Director 0 | 0 | | |
| Doug Fosselman PO Box 1200 Westerville, OH 430861200 | Director 0 | 0 | | |

TY 2008 Other Assets Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 08000091

Software Version: 2008v2.7

| Description | Beginning of Year Amount | End of Year Amount |
|---------------------|-----------------------------|-----------------------|
| Prepaid Expenses | | 216 |
| Accounts Receivable | 2,950 | 3,994 |

TY 2008 Other Changes in Net Assets Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 08000091

Software Version: 2008v2.7

| Description | Amount |
|---|--------|
| Prior period adjustment | -110 |
| Home District Governor Support - Net change | -460 |

TY 2008 Other Expenses Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 08000091

Software Version: 2008v2.7

| Description | Amount |
|------------------------------|--------|
| Admin,Conf,Fellowship Events | 22,061 |

TY 2008 Other Liabilities Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 08000091

Software Version: 2008v2.7

| Description | Beginning of Year Amount | End of Year Amount |
|---------------------------------------|-----------------------------|-----------------------|
| Credit cards | 440 | |
| Advanced Dues | 50 | 200 |
| Accounts Payable and Accrued Expenses | 12,461 | 13,118 |