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Form **990-EZ** Department of the Treasury

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 of donor advised funds 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.

OMB No 1545-1150

Open to Public

| 1111.64 | nai nove | I he organization may have to use a copy of this return to satisfy state reporting regu | ııreme | ents. | inspection |
|-----------------------|---------------------|--|--------------|---------------|-------------------------------------|
| A | For the | e 2008 calendar year, or tax year beginning JUL 1, 2008 and ending JUN | 1 30 | 0, 2 | 2009 |
| В | Check if applicable | le Please C Name of organization | D Emp | loyer id | dentification number |
| | Addres | s use IRS label or | | | |
| | Name change | Print or BALTIMORE ROTARY FOUNDATION, INC. | 52 | 2-60 | 054895 |
| | Initial | lype Number and street (or P.O. how if mail is not delivered to street address) Poom/suito I | | | |
| | Termination | n- Specific 9515 DEERECO ROAD 500 | 4: | 10-4 | 453-0900 |
| | Amen | ided trops City or town state or country and 7IP + 4 | | Jp Exer | |
| | Applica pendin | | | nber ▶ | - |
| | • Sect | tion 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed G Account | | | |
| | | Schedule A (Form 990 or 990-EZ). Other (s | _ | | <u> </u> |
| 1 | Website | | | _ | ne organization is not |
| J | Organiz | zation type (check only one)— X 501(c) (3) ◀ (insert no.) 4947(a)(1) or 527 required to | attach | Sched | ule B (Form 990, 990-EZ, or 990-PF) |
| K | Check D | if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not i | more t | han \$2 | 5,000. A return is not |
| | required | d, but if the organization chooses to file a return, be sure to file a complete return. | | | |
| L | Add line | es 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 | | \$ | 362,443. |
| P | art I | Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instruc | ctions | for Par | t l.) |
| | 1 | Contributions, gifts, grants, and similar amounts received | | 1 | 22,113. |
| | 2 | Program service revenue including government fees and contracts | | 2 | |
| | 3 | Membership dues and assessments | | 3 | |
| <u>_</u> | 4 | Investment income | | 4 | 39,852. |
| 7090 | 5a | Gross amount from sale of assets other than inventory STMT 1 5a 300, 47 | 78. | | |
| က | Ь | Less: cost or other basis and sales expenses 5b 314,51 | .8. | | |
| N | С | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule) | L | 5c | -14,040. |
| _ <u>=</u> | 6 | Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here ▶ | | | |
| | a | Gross revenue (not including \$ of contributions | | | |
| "B | | reported on line 1) 6a | | | |
| 7 | Ь | Less: direct expenses other than fundraising expenses | | | |
| CANNED LUN Revenue | C | Net income or (loss) from special events and activities (Subtract line 6b from line 6a) | | 6c | |
| ? | 7a | Gross sales of inventory, less returns and allowances 7a | | | |
| 3 | b | Less: cost of goods sold 7b | | | |
|) | C | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) | Ļ | 7c | |
| | 1 | Other revenue (describe > | _) | 8 | |
| | | Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 | ▶ | 9 | 47,925. |
| | 1 | Grants and similar amounts paid (attach schedule) | - | 10 | 58,612. |
| | 1 | Benefits paid to or for members | - | 11 | |
| sesus | 1 | Salaries, other compensation, and employee benefits | - 1 | 12 | |
| ë | 1 | Professional fees and other payments to independent contractors | - | 13 | |
| Expe | 1 | Occupancy, rent, utilities, and maintenance | - | 14 | |
| _ | 1 | Printing, publications, postage, and shipping | . - | 15 | 10 500 |
| | 1 | Other expenses (describe INVESTMENT MANAGEMENT FEES | -)⊦ | 16 | 10,762. |
| _ | | Total expenses. Add lines 10 through 16 | | 17 | 69,374. |
| ţ | 1 | Excess or (deficit) for the year (Subtract line 17 from line 9) | - | 18 | -21,449. |
| Net Assets | 19 | Net assets or fund balances at beginning of year (from line 27, column (A)) | | | 1 452 005 |
| Ĕ | | (must agree with end-of-year figure reported on prior year's return) | 、 ├ | 19 | 1,453,807. |
| Š | 1 | Other changes in net assets or fund balances (attach explanation) SEE STATEMENT 2 | '. | 20 | <u>-157,686.</u> |
| | 21 | Net assets or fund balances at end of year. Combine lines 18 through 20 | • I | 21 | 1,274,672. |
| P | art II | | | 10-EZ. | (D) Fad at |
| | 0 | , , , , , , , , , , , , , , , , , , , | | 7 | (B) End of year |
| 22 | | h, savings, and investments 1,453,8 | <u>U / .</u> | 7 1 | 1,274,672. |
| 23 | | d and buildings | | 23 | |
| 24 | | er assets (describe) | 0.7 | 24 | 1 274 672 |
| 25 | | al assets 1,453,8 | | $\overline{}$ | <u>1,274,672.</u> |
| 26 | | al liabilities (describe ►) assets or fund balances (line 27 of column (B) must agree with line 21) 1 , 453 , 8 | 0. | | $\frac{0.}{1,274,672.}$ |
| 27 832 | | assets or runo balances (line 27 of column (B) must agree with line 21) 1,453,6 | <u> </u> | [2] | 1,4/4,6/2. |

| Form 990-EZ (2008) BALTIMORE ROTARY FOUNDAT: | ON, INC. | | 52- | 60548 | 95 Page 2 |
|---|---------------------------------------|--------------------------------|----------|----------------------|------------------|
| Part III Statement of Program Service Accomplishme | | хрепѕеѕ | | | |
| What is the organization's primary exempt purpose? SEE STATEMENT | (Required | for 501(c)(3) rganizations and | | | |
| Describe what was achieved in carrying out the organization's exempt purposes. In provided, the number of persons benefited, or other relevant information for each p | | l) trusts; optional | | | |
| 28 CONTRIBUTE TO THE SUPPORT OF LOCAL | AND REGIONAL | CHARITABI | Æ, | | |
| EDUCATIONAL SCIENTIFIC AND RELIGIOU | | | | | |
| AGENCIES. | |] [| | | |
| (Grants \$ 58,612.) If this amount includes foreign | grants, check here | | | 28a | 58,612. |
| 29 | | | | | |
| | | | | | |
| | | | | <u> </u> | |
| (Grants \$) If this amount includes foreign | grants, check here | • | | 29a | |
| 30 | | | | | |
| | | | | | |
| | | | | | |
| (Grants \$) If this amount includes foreign | grants, check here | > | | 30a | |
| 31 Other program services (attach schedule) | | | | | |
| (Grants \$) If this amount includes foreign | grants check here | • | | 31a | |
| 32 Total program service expenses (add lines 28a through 31a) | graine, encontricte | | | 32 | 58,612. |
| Part IV List of Officers, Directors, Trustees, and Key I | Employees. List each one m | ven if not compensated | (See the | instructions : | for Part IV) |
| | T . | | T :- | ntributions | |
| A N No man and a Advance | (b) Title and average hours | (c) Compensation | ` to e | mployee | (e) Expense |
| (a) Name and address | per week devoted to | (If not paid, enter | | fit plans & | account and |
| | position | -0-) | | eferred pensation | other allowances |
| FRANCIS HOGLE, 1107 KENILWORTH | PRESIDENT | - | | ponoution | |
| DRIVE, SUITE 2, TOWSON, MD 21204 | 2.00 | 0. | | 0. | ۸ ا |
| KEITH NOVAK | TREASURER | <u> </u> | | | 0. |
| 9515 DEERECO ROAD, TIMONIUM, MD 21093 | -1 | ۸ ا | | 0 | |
| | | 0. | | 0. | 0. |
| JEFF PENZA, 401 WOODBOURNE AVE, | TRUSTEE | | | 0 | |
| BALTIMORE, MD 21212 | 2.00 | 0. | | 0. | 0. |
| BETH KETZNER | TRUSTEE | | | • | |
| BALTIMORE, MD 21201 | 2.00 | 0. | | 0. | 0. |
| ART TATE, 7123 EAST FURNACE BRANCH | TRUSTEE | | i | • | |
| ROAD, BLEN BURNIE, MD 21060 | 2.00 | 0. | | 0. | 0. |
| | 4 | | | | |
| | <u>-</u> | | | | <u> </u> |
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| P | art 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 | | | | | | |
| 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 | | | | | | |
| 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. | | | | | | |
| а | Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy | | | | | | |
| | tax requirements? | 35a | | X | | | |
| b | If "Yes," has it filed a tax return on Form 990-T for this year? | _35b | N/ | Α | | | |
| 36 | Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Sch. N | 36 | | Х | | | |
| 37 a | Enter amount of political expenditures, direct or indirect, as described in the instructions. | , | | | | | |
| b | Did the organization file Form 1120-POL for this year? | 37b | | X | | | |
| 38 a | 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 | | X | | | |
| b | If "Yes," complete Schedule L, Part II and enter the total amount involved 38b N/A | | | | | | |
| 39 | Section 501(c)(7) organizations. Enter: | | | | | | |
| а | Initiation fees and capital contributions included on line 9 | | | | | | |
| b | Gross receipts, included on line 9, for public use of club facilities 39b N/A | | | | | | |
| 40 a | Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: | | | | | | |
| | section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶ 0 . | | | | | | |
| b | Section 501(c)(3) and (4) organizations. 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 | | X | | | |
| 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 | | | | | | |
| е | All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter | | | | | | |
| | transaction? If "Yes," complete Form 8886-T | 40e | | X | | | |
| 41 | List the states with which a copy of this return is filed. ▶ MD | | | | | | |
| 42 a | The books are in care of \blacktriangleright KEITH NOVAK Telephone no. \blacktriangleright 410 – 45 | <u>3-0</u> | 900 | | | | |
| | Located at ► 9515 DEERECO ROAD, TIMONIUM, MD ZIP+4 ► 2 | 109 | 3 | | | | |
| 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 | | Yes | No | | | |
| | account)? | 42b | <u> </u> | X | | | |
| | If "Yes," enter the name of the foreign country: | | i i | ı | | | |
| | See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts. | | | ı | | | |
| C | At any time during the calendar year, did the organization maintain an office outside of the U.S.? | 42c | | X | | | |
| | 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 | | | | | | |
| | and enter the amount of tax-exempt interest received or accrued during the tax year | N/A | | | | | |
| | | ı | | | | | |
| | | | Yes | No | | | |
| 44 | Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of | | , | | | | |
| | Form 990-EZ | 44 | | _X_ | | | |
| 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 | | X | | | |
| | | Form 99 | 90-F7 / | 20087 | | | |

Form 990-EZ (2008)

| Form 990-E | TIME THE TAXABLE PROPERTY OF THE PROPERTY OF T | | | | <u> 2-60.</u> | | | Page 4 | | |
|---|--|---|---------------------------------------|-------------|---|--------------|---------------------------------|-------------|--|--|
| Part VI | Section 501(c)(3) organizations only. All section | 501(c)(3) organizations m | nust answer qu | estions | 46-49 and | d compl | ete the | ! | | |
| | tables for lines 50 and 51 | | | | | | | | | |
| 46 Did th | ne organization engage in direct or indirect political campaign activities o | n behalf of or in opposition | to candidates for | public | | | Yes | No | | |
| office? If "Yes," complete Schedule C, Part I | | | | | | | | X | | |
| 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II | | | | | | | | | | |
| 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | | | | | | | | | | |
| 49a Did th | ne organization make any transfers to an exempt non-charitable related c | organization? | | | | 49a | | X | | |
| b If "Yes | s," was the related organization(s) a section 527 organization? | | | | | 49t | | | | |
| | olete this table for the five highest compensated employees (other than of other than of other than of other than of the organization. If there is none, enter "None." | officers, directors, trustees a | nd key employee | es) who e | ach receive | ed more t | han \$10 | 0,000 | | |
| | (a) Name and address of each employee paid more than \$100,000 NONE | (b) Title and average hou per week devoted to position | rs (c) Compen | sation | (D) Contribution to employee benefit plans deferred compensatio | | (E) Exp account her allov | t and | | |
| | NONE | | | | | | | | | |
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| 51 Comp | plete this table for the five highest compensated independent contractors | s who each received more th | an \$100,000 of o | compens | ation from | the orga | nization. | If ther | | |
| IS NOT | ne, enter "None." NONE | | | | | | | | | |
| | (a) Name and address of each independent contractor paid more t | than \$100,000 | (b) Type | e of servi | ce | (c) Co | (c) Compensati | | | |
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| | | | | | | | | | | |
| Total numb | er of other independent contractors each receiving over \$100,000 | | > | | | | | | | |
| Sıgn Here | Under penalties of perjury, I declare that I have examined this return, including accorrect, and complete Declaration of prepara (other than officer) is based on all in | companying schedules and stater formation of which preparer has a | nents, and to the be any knowledge | est of my k | nowledge an | d belief, it | | | | |
| | KEITH F. NOVAK, TREASURER Type or print name and title | | | | | | | | | |
| Paid Preparer's | Preparer's signature | Date Charles of all | | | | ng Numbe | (See inst | ir) | | |
| Use Only | Firm's name (or yours | | | EIN > | | | | | | |
| | ıl self-employed), Phone ▶ | | | | | | | | | |
| | | | | no. | | [| | | | |
| May the IR: | S discuss this return with the preparer shown above? See instructions | | | | | LXI | es _ | No | | |

SCHEDULE A (Form 990 or 990-EZ)

(FORM 950 01 950-E2

Department of the Treasury Internal Revenue Service

Public Charity Status and Public Support

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

2008
Open to Public

Inspection

Name of the organization

Employer identification number

Schedule A (Form 990 or 990-EZ) 2008

| | | | | <u>RE ROTARY FO</u> | | | INC. | | | 52 | <u>2-6054895</u> |
|-------------|--|-----------|--------------------------|---|--|--|--------------|--|--|--|-----------------------|
| Part I | Reason | for Pu | blic Char | ity Status (All organiz | zations mu | ist comple | te this par | t.) (see ins | tructions) | | |
| he organ | ization is not a | private | foundation | because it is. (Please ch | neck only o | one organi | zation) | | | | |
| 1 🗀 | A church, cor | nventioi | n of churche | s, or association of chur | ches desc | ribed in se | ection 170 | (b)(1)(A)(i |). | | |
| 2 | | | | '0(b)(1)(A)(ii). (Attach Sc | | | | | ,- | | |
| 3 🗔 | | | | | | | 170(b)(1) | (A)(iii). (At | tach Sch | edule H.) | |
| 4 | A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). (Attach Schedule H.) A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, | | | | | | | | | | |
| + (| city, and state | | or gas includes | opo, a.co co., ja | | pital acco | | .0 | (D)(1)(1 y(| | to ricopitat o riamo, |
| 5 🗔 | - | | rated for the | benefit of a college or u | niversity o | wood or o | perated by | , a govern | montal un | ut describe | d in |
| 5 L | _ | | | _ | Inversity O | wried or of | perated by | a govern | inental un | iir describe | G III |
| | section 170 | | | | | | | | | | |
| <u>6</u> ├─ | | | _ | ent or governmental uni | | | | | | | |
| 7 | _ | | | eives a substantial part | or its supp | ort from a | governme | ental unit d | or from the | e generai p | ublic described in |
| _ | section 170(| | | | | | | | | | |
| 8 | | | | ection 170(b)(1)(A)(vi). | | | | | | | |
| 9 [] | | | | eives (1) more than 33 | | | | | | | |
| | | | | nctions - subject to certa | | | | | | | - |
| | | | | axable income (less sec | tion 511 ta | x) from bu | isinesses | acquired b | y the org | anization a | fter June 30, 1975. |
| | See section | 509(a)(2 | 2). (Complete | the Part III) | | | | | | | |
| 10 | - | _ | - | perated exclusively to te | ·- | - | | | • | - | |
| 11 [X] | _ | - | | perated exclusively for the | | | | | | | • |
| | - | | _ | ations described in secti | | - | | 2). See se e | ction 509 | (a)(3). Che | ck the box that |
| | | | · · · · · - · | organization and compl | | _ | | | | _ | |
| | a Type I | | b∟X | ا Type II و | с 📖 Тур | e III - Func | tionally in | tegrated | | d 📖 | Type III - Other |
| e L | By checking | this box | c, I certify tha | it the organization is not | controlled | directly o | r indirectly | by one o | r more dis | qualified p | ersons other than |
| | foundation m | anager | s and other t | han one or more publicly | y supporte | ed organiza | ations des | cribed in s | ection 50 | 9(a)(1) or s | ection 509(a)(2). |
| f | If the organiz | ation re | ceived a writ | ten determination from | the IRS tha | at it is a Ty | pe I, Type | II, or Type | e III | | |
| | supporting or | rganızat | tion, check th | nis box | | | | | | | |
| g | Since August | 17, 20 | 06, has the o | organization accepted ar | ny gift or c | ontributior | from any | of the foll | owing per | rsons? | |
| | (i) A persor | n who c | irectly or ind | irectly controls, either al | lone or tog | ether with | persons o | described | ın (ii) and | (iii) below, | Yes No |
| | the gove | erning b | ody of the si | upported organization? | | | | | | | 11g(i) X |
| | (ii) A family | membe | er of a persor | n described in (i) above? |) | | | | | | 11g(ii) X |
| | (iii) A 35% d | controlle | ed entity of a | person described in (i) | or (ii) above | e? | | | | | 11g(iii) X |
| h | Provide the fo | ollowing | Information | about the organizations | the organ | ization sup | oports | | | | |
| | | | | | | | | | | | |
| (i) Name | of supported | , | ii) EIN | (iii) Type of | (iv) Is the c | organization | (v) Did you | notify the | (vi) ! | s the | (vii) Amount of |
| • • | anization | , | , | organization (described on lines 1-9 | in col. (i) lis | | | ion in col. | organizati | on in col. [| support |
| J | | | | above or IRC section | governing | document? | (i) of you | support? | (i) organi U.S | 5.7 | |
| | | | | (see instructions)) | Yes | No | Yes | No | Yes | No | |
| ROTAR | Y | | | | | | | | | | |
| INTER | NATIONA | 52-0 | 466100 | 9 | X | | x | | Х | 1 1 | 58,612. |
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| otal | | | | | | | | | | | 58,612. |
| Ulai | | | | <u> </u> | | <u> </u> | | | | | <u> </u> |

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

| Pa | Complete only five sheets | - | | |)(b)(1)(A)(iv) ar | nd 170(b)(1)(A)(| VI) | | |
|---------|--|----------------------|------------------------|---|----------------------|---------------------|---|--|--|
| <u></u> | (Complete only if you checke | d the box on line : | 5, 7, 01 6 01 Part 1.) | <u>' — - — — — — — — — — — — — — — — — — — </u> | | | | | |
| | ction A. Public Support | Γ | T | T | T -: -: | | | | |
| | endar year (or fiscal year beginning in) | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total | | |
| 1 | Gifts, grants, contributions, and | | | | | | | | |
| | membership fees received (Do not | | | | | | | | |
| | include any "unusual grants.") | | | | | | | | |
| 2 | Tax revenues levied for the organ- | | | | | | | | |
| | ization's benefit and either paid to | | | | | | | | |
| | or expended on its behalf | | | | <u> </u> | | | | |
| 3 | The value of services or facilities | | | | | | | | |
| | furnished by a governmental unit to | | | | | | | | |
| | the organization without charge | <u> </u> | | | | | | | |
| 4 | Total. Add lines 1 - 3 | · | | <u> </u> | | | | | |
| 5 | The portion of total contributions | | | | | | | | |
| | by each person (other than a | | | ŀ | | | | | |
| | governmental unit or publicly | | | | | 1 | | | |
| | supported organization) included | | | | | | | | |
| | on line 1 that exceeds 2% of the | | | | | | | | |
| | amount shown on line 11, | | | | | | | | |
| | column (f) | | | | | | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | |
| | Public Support. Subtract line 5 from line 4 | | | l | | | | | |
| | ction B. Total Support | T | ı | , | | 1 | | | |
| | endar year (or fiscal year beginning in) | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total | | |
| 7 | Amounts from line 4 | | | | - | | | | |
| 8 | Gross income from interest, | | | | | | | | |
| | dividends, payments received on | | | | | | | | |
| | securities loans, rents, royalties | | | | | | | | |
| | and income from similar sources | | | | | | | | |
| 9 | Net income from unrelated business | | | | | | | | |
| | activities, whether or not the | | | | | | | | |
| | business is regularly carried on | | | | | <u> </u> | | | |
| 10 | Other income Do not include gain | | | | | | | | |
| | or loss from the sale of capital | | | | | | | | |
| | assets (Explain in Part IV) | | | | | | | | |
| | Total support. Add lines 7 through 10 | | | | | | | | |
| | Gross receipts from related activities, | • | | | | 12 | | | |
| 13 | First five years. If the Form 990 is for | r the organization's | s first, second, thi | rd, fourth, or fifth t | ax year as a section | on 501(c)(3) | | | |
| 60 | organization, check this box and stor | | roontogo | | | | | | |
| | ction C. Computation of Publ | <u>` `</u> | | | | T | | | |
| | Public support percentage for 2008 (| • • • | • | column (f)) | | 14 | % | | |
| 15 | ,, , | • | · | | | 15 | % | | |
| 16a | 33 1/3% support test - 2008. If the c | • | | | 14 is 33 1/3% or i | more, check this bo | x and | | |
| | stop here. The organization qualifies as a publicly supported organization | | | | | | | | |
| b | 33 1/3% support test - 2007. If the c | | | | l line 15 is 33 1/39 | 6 or more, check th | is box | | |
| | and stop here. The organization qualifies as a publicly supported organization | | | | | | | | |
| 17a | 17a 10% -facts-and-circumstances test - 2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, | | | | | | | | |
| | and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization | | | | | | | | |
| | meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization. | | | | | | | | |
| b | 10% -facts-and-circumstances tes | _ | | | | | | | |
| | more, and if the organization meets the | | | | • | | . — | | |
| | organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization | | | | | | | | |
| 18 | Private foundation. If the organization | n did not check a | box on line 13, 16 | a, 16b, 17a, or 17l | | | | | |
| | | | | | Sch | edule A (Form 990 | or 990-EZ) 2008 | | |

| | | | | T | | |
|--|-----------------------|-----------------------|------------------------|---------------------|----------------------|-----------|
| Calendar year (or fiscal year beginning in) | (a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
| 1 Gifts, grants, contributions, and | | | | | | |
| membership fees received (Do not | | | • | | | |
| ınclude any "unusual grants.") | | | | | | |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 Gross receipts from activities that are not an unrelated trade or bus- | | | | | | |
| iness under section 513 | | | | | | |
| 4 Tax revenues levied for the organ- ization's benefit and either paid to or expended on its behalf | | | | | | |
| 5 The value of services or facilities | | | | | | |
| furnished by a governmental unit to the organization without charge | | | | | | |
| 6 Total. Add lines 1 · 5 | | | | | | - |
| 7a Amounts included on lines 1, 2, and | | | | | | |
| 3 received from disqualified persons | | | | | | |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000 | | | | | | |
| c Add lines 7a and 7b | | | | | | |
| 8 Public support (Subtract line 7c from line 6) Section B. Total Support | - | | | | | |
| Calendar year (or fiscal year beginning in) | _(a) 2004 | (b) 2005 | (c) 2006 | (d) 2007 | (e) 2008 | (f) Total |
| 9 Amounts from line 6 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | | | | | | |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 | | | | | | |
| c Add lines 10a and 10b 11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on | | | | | - | |
| 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) | | | | | | |
| 13 Total support (Add lines 9, 10c, 11, and 12) | | | | | | |
| 14 First five years. If the Form 990 is for t | ne organization | s first, second, thi | d, fourth, or fifth ta | ax year as a secti | on 501(c)(3) organiz | ation, |
| check this box and stop here | | | | | | |
| Section C. Computation of Public | Support Pe | rcentage | | | | _ |
| 15 Public support percentage for 2008 (lin | e 8, column (f) o | livided by line 13, | column (f)) | | 15 | g |
| 16 Public support percentage from 2007 S | chedule A, Parl | IV-A, line 27g | | | 16 | |
| Section D. Computation of Invest | ment Incom | e Percentage | | | | |
| 17 Investment income percentage for 200 | 3 (line 10c, colu | mn (f) divided by lii | ne 13, column (f)) | | 17 | 9 |
| 18 Investment income percentage from 20 | 07 Schedule A, | Part IV-A, line 27h | | | 18 | 9 |
| 19a 33 1/3% support tests - 2008. If the o | ganızatıon dıd ı | not check the box | on line 14, and line | e 15 is more than | 33 1/3%, and line 1 | 7 is not |
| more than 33 1/3%, check this box and | stop here. The | e organization qual | ifies as a publicly s | supported organiz | zation | ▶□ |
| b 33 1/3% support tests - 2007. If the o | ganızatıon dıd ı | not check a box or | line 14 or line 19a | a, and line 16 is m | ore than 33 1/3%, a | ınd |
| | | | | | | |
| line 18 is not more than 33 1/3%, checl | this box and s | top here. The orga | anızatıon qualifies a | as a publicly supp | oorted organization | ▶∟_ |

| FORM 990-EZ GAIN | (LOSS) FROM PU | BLICLY TRADED SI | ECURITIES | STATEMENT 1 |
|----------------------------|----------------------|------------------------|--------------------|-----------------------|
| DESCRIPTION | GROSS SALES PRICE | COST OR OTHER BASIS | EXPENSE OF SALE | NET GAIN OR (LOSS) |
| INVESTMENT PORTFOLIO SALES | 300,478. | 314,518. | 0. | -14,040. |
| TO FORM 990-EZ, LINE | 5 300,478. | 314,518. | 0. | -14,040. |
| FORM 990-EZ OTHER | CHANGES IN NET | ASSETS OR FUND | BALANCES | STATEMENT 2 |
| DESCRIPTION | | | | AMOUNT |
| UNREALIZED GAIN/LOSS | | | - | -157,686. |
| TOTAL TO FORM 990-EZ | , LINE 20 | | - | -157,686. |

| FORM 990-EZ | INFORMATION REGARDING TRANSFERS ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS | | S' | PATE! | MENT | |
|-------------|--|-----|----|-------|------|----|
| DIRECTLY OF | SANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS, INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL TRACT? | [|] | YES | [X] | NO |
| • | SANIZATION, DURING THE YEAR, PAY PREMIUMS, INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . | . [|] | YES | [X] | NO |

990-EZ PG 2

STATEMENT 4

TO PROVIDE CHARITABLE CONTRIBUTIONS TO NON-PROFIT ORGANIZATIONS WITHIN THE BALTIMORE CITY AND SURROUNDING AREAS, PROVIDE FUNDING FOR LEADERSHIP AND GROWTH OPPORTUNITIES FOR YOUTH OF BALTIMORE CITY, AND TO PROVIDE INTERNATIONAL OUTREACH TO SPREAD THE GOALS OF ROTARY.

| * | |
|---|---------------------------------------|
| Form 8868 (Rev. 4-2009) | Page 2 |
| If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this both to complete only Part II and check this both the complete only Part II and check this both the complete only Part II and check this both the complete only Part II and check | • |
| Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed If you are filing for an Automatic 3-Month Extension, complete only Part I (on page 1). | Form 8868 |
| Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no co | onies needed) |
| Name of Exempt Organization | Employer identification number |
| Type or | Limployer identification number |
| print BALTIMORE ROTARY FOUNDATION, INC. | 52-6054895 |
| File by the extended Number, street, and room or suite no. If a P.O. box, see instructions. | For IRS use only |
| due date for filing the 9515 DEERECO ROAD, NO. 500 | |
| return See City, town or post office, state, and ZIP code. For a foreign address, see instructions | |
| TIMONIUM, MD 21093 | |
| Check type of return to be filed (File a separate application for each return): | |
| Form 990 X Form 990-EZ Form 990-T (sec 401(a) or 408(a) trust) Form 1041-A | Form 5227 |
| Form 990-BL Form 990-PF Form 990-T (trust other than above) Form 4720 | Form 6069 |
| STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previou | sly filed Form 8868. |
| KEITH NOVAK | |
| • The books are in the care of ▶ 9515 DEERECO ROAD, NO. 500 - TIMONIUM, | MD 21093 |
| Telephone No ► 410 - 453 - 0900 FAX No ► | |
| If the organization does not have an office or place of business in the United States, check this box | ▶ □ |
| If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization is four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization is four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization is four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization is four digit Group Exemption Number (GEN) If this is for a Group Return, enter the organization is four digit Group Exemption Number (GEN) If this is found in the organization in the organization in the organization is found in the organization in the organization is found in the organization in the organization in the orga | is is for the whole group, check this |
| box If it is for part of the group, check this box and attach a list with the names and EINs of all | members the extension is for |
| 4 request an additional 3-month extension of time until MAY 15, 2010 | |
| 5 For calendar year, or other tax year beginning <u>JUL 1, 2008</u> , and ending | <u>JUN 30, 2009</u> |
| 6 If this tax year is for less than 12 months, check reason: Initial return Final return | Change in accounting period |
| 7 State in detail why you need the extension | |
| ADDITIONAL TIME IS NEEDED IN ORDER TO FILE AN ACCURATE | AND COMPLETE |
| RETURN. | T |
| 8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any | |
| nonrefundable credits. See instructions | 8a \$ |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated | |
| tax payments made. Include any prior year overpayment allowed as a credit and any amount paid | |
| previously with Form 8868 | 8b \$ |
| c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit | 8c \$ N/A |
| with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions. Signature and Verification | 8c \$ N/A |
| Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the | hest of my knowledge and helief |
| it is true, correct, and complete, and that I am authorized to prepare this form. | , oost of my knowledge and belief, |
| Signature ► Title ► TREASURER | Date ▶ |

Form 8868 (Rev. 4-2009)