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# 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)

2008

Open to Public  
Inspection

► 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.

A For the 2008 calendar year, or tax year beginning JUL 1, 2008 and ending JUN 30, 2009

B Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination return <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization <b>OKLAHOMA FUNERAL DIRECTORS ASSOCIATION, INC.</b> Number and street (or P O box, if mail is not delivered to street address) <b>6801 N. BROADWAY, SUITE 106</b> City or town, state or country, and ZIP + 4 <b>OKLAHOMA CITY, OK 73116</b>	D Employer identification number <b>73-1059316</b> E Telephone number <b>405.843.0730</b> F Group Exemption Number ►
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- Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ)

G Accounting method  Cash  Accrual  
Other (specify) ►

I Website: ► **WWW.OKFDA.COM**

H Check ►  if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

K 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 ► \$ **191,502.**

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

Revenue	1 Contributions, gifts, grants, and similar amounts received	1
	2 Program service revenue including government fees and contracts	2 <b>83,528.</b>
	3 Membership dues and assessments	3 <b>65,802.</b>
	4 Investment income	4
	5a Gross amount from sale of assets other than inventory	5a
	b Less cost or other basis and sales expenses	5b
	c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)	5c
	6 Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ► <input type="checkbox"/>	6c
	a Gross revenue (not including \$ _____) of contributions reported on line 1)	6a
b Less direct expenses other than fundraising expenses	6b	
c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	7c	
7a Gross sales of inventory, less returns and allowances	7a	
b Less cost of goods sold	7b	
c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
8 Other revenue (describe ► SEE STATEMENT 4 )	8 <b>42,172.</b>	
9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ► <b>191,502.</b>	9	
Expenses	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 <b>60,936.</b>
	13 Professional fees and other payments to independent contractors	13 <b>7,855.</b>
	14 Occupancy, rent, utilities, and maintenance	14 <b>10,357.</b>
	15 Printing, publications, postage, and shipping	15 <b>15,194.</b>
	16 Other expenses (describe ► SEE STATEMENT 1 )	16 <b>98,692.</b>
	17 Total expenses. Add lines 10 through 16 ► <b>193,034.</b>	17 <b>193,034.</b>
Net Assets	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18 <b>&lt;1,532.&gt;</b>
	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 <b>299,722.</b>
	20 Other changes in net assets or fund balances (attach explanation)	20
	21 Net assets or fund balances at end of year Combine lines 18 through 20 ► <b>298,190.</b>	21 <b>298,190.</b>

## 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

Part II	(See the instructions for Part II)	(A) Beginning of year	(B) End of year
	22 Cash, savings, and investments	308,067.	22 <b>304,871.</b>
	23 Land and buildings	23	
	24 Other assets (describe ► SEE STATEMENT 2 )	655.	24 <b>1,579.</b>
	25 Total assets	308,721.	25 <b>306,450.</b>
	26 Total liabilities (describe ► SEE STATEMENT 3 )	8,999.	26 <b>8,260.</b>
	27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	299,722.	27 <b>298,190.</b>

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## Part V Other Information (Note the statement requirements in the instructions for Part VI.)

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

	Yes	No
33		X
34		X

a 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
35b	X

b If "Yes," has it filed a tax return on Form 990-T for this year?

36	
37a	0.

36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Sch N

37b	X
38a	X

37a Enter amount of political expenditures, direct or indirect, as described in the instructions ► 37a

38b	N/A
39a	N/A

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?

39b	N/A
40b	N/A

b If "Yes," complete Schedule L, Part II and enter the total amount involved

39 Section 501(c)(7) organizations Enter

39a	N/A
39b	N/A

a Initiation fees and capital contributions included on line 9

39b	N/A
40b	N/A

40a Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ► N/A , section 4912 ► N/A , section 4955 ► N/A

40b	N/A
40c	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

40c	0.
40d	X

c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958

40d	0.
40e	X

d Enter amount of tax on line 40c reimbursed by the organization

40e	X
41	OK

41 List the states with which a copy of this return is filed ► OK

42a The books are in care of ► OKLAHOMA FUNERAL DIRECTORS ASSOCIAT Telephone no. ► 405-843-0730  
 Located at ► 6801 N. BROADWAY, SUITE 106, OKLAHOMA CITY, OK ZIP + 4 ► 73116

42b	X
42c	X

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)?

42c	X
43	►

43	43
43	N/A

43	N/A
44	X

44	X
45	X

45	X
45	X

45	X
45	X

44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ

44	X
45	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
45	X

45	X
45	X

45	X
45	X

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OKLAHOMA FUNERAL DIRECTORS  
ASSOCIATION, INC.

Form 990-EZ (2008)

73-1059316

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**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.

	Yes	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 each received more than \$100,000 of compensation from the organization. If there is none, enter "None"		

(a) Name and address of each employee paid more than \$100,000 N/A	(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
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 is none, enter "None"

N/A	(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
Total number of other independent contractors each receiving over \$100,000 ►			

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 JAY BAINES AS AGENT		
Type or print name and title JAY BAINES Exec Dir.		Date 5-10-10	Date

Paid Preparer's Use Only	Preparer's signature ►	Date 5/10/10	Check if self-employed ► <input type="checkbox"/>	Preparer's Identifying Number (See Instr) P00265411
	Firm's name (or yours if self-employed), address, and ZIP + 4 ► ENGELBACH ROBERTS & CO. 4000 CLASSEN CTR STE 100C OKLAHOMA CITY, OK 73118		EIN ►	Phone ► no (405) 528-4000

May the IRS discuss this return with the preparer shown above? See instructions

►  Yes  No

Form 990-EZ (2008)

FORM 990-EZ	OTHER EXPENSES	STATEMENT 1
DESCRIPTION		AMOUNT
DISTRICT MEETINGS		13,603.
LEGISLATIVE COMMITTEE EXP		5,625.
BOARD MEETING EXPENSES		1,917.
INSURANCE		1,632.
SCHOLARSHIP EXPENSE		1,500.
CONTINUING EDUCATION EXPENSE		878.
MISCELLANEOUS EXPENSE		1,257.
TAXES -OTHER		111.
BANK SERVICE CHARGES		208.
OFFICE SUPPLIES AND POSTAGE		6,574.
PAYROLL TAXES		4,345.
TELEPHONE		3,646.
TRAVEL		21,154.
CONVENTION EXPENSE		36,242.
TOTAL TO FORM 990-EZ, LINE 16		98,692.

  

FORM 990-EZ	OTHER ASSETS	STATEMENT 2	
DESCRIPTION		BEG. OF YEAR	END OF YEAR
PREPAID EXPENSES AND DEFERRED CHARGES		655.	655.
OTHER DEPRECIABLE ASSETS		0.	924.
TOTAL TO FORM 990-EZ, LINE 24		655.	1,579.

  

FORM 990-EZ	OTHER LIABILITIES	STATEMENT 3	
DESCRIPTION		BEG. OF YEAR	END OF YEAR
CUSTODIAN FUNDS		2,040.	716.
MUSIC LICENSE PAYABLE		3,347.	3,347.
SALES CLUB DUES PAYABLE		<70.>	0.
ACCOUNTS PAYABLE AND ACCRUED EXPENSES		2,211.	2,034.
DEFERRED REVENUE		1,471.	2,163.
TOTAL TO FORM 990-EZ, LINE 26		8,999.	8,260.

FORM 990-EZ	OTHER REVENUE	STATEMENT	4
DESCRIPTION		AMOUNT	
INTEREST INCOME		5,912.	
ROYALTIES		36,260.	
TOTAL TO FORM 990-EZ, LINE 8		42,172.	

FORM 990-EZ

INFORMATION REGARDING TRANSFERS  
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 5

A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT? . . . . . [ ] YES [X] NO

B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS, DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . [ ] YES [X] NO

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TO ASSIST IN THE CONDUCTING OF DISTRICT MEETINGS IN THE SIX DISTRICTS IN THE STATE FOR THE PURPOSE OF MAINTAINING MORE DIRECT COMMUNICATION AMONG THE MEMBERS. THESE MEETINGS ARE HELD AT LEAST FOUR TIMES A YEAR.

TO ESTABLISH, DEVELOP AND MAINTAIN THE HIGHEST POSSIBLE STANDARD FOR ETHICAL CONDUCT AND PROFICIENCY FOR THOSE ENGAGED IN THE PROFESSION OF FUNERAL SERVICE. TO ENCOURAGE THE HIGHEST EDUCATIONAL LEVEL POSSIBLE OF ITS MEMBERS AND TO CONVEY TO CONSUMERS INFORMATION AS TO FUNERAL SERVICE, FUNERAL MERCHANDISE AND TO PROTECT THE CONSUMERS' INTEREST IN REGARD THERETO

FORM 990-EZ

OTHER PROGRAM SERVICES

STATEMENT 8

DESCRIPTION

GRANTS

EXPENSES

SCHOLARSHIPS ARE PROVIDED TO QUALIFIED STUDENTS WHO  
ENTER THE FIELD OF FUNERAL SERVICE

TOTAL TO FORM 990-EZ, LINE 31

*elect*  
*Apr. 1, 2009*

## 2009-2010 OFDA OFFICERS, DISTRICT GOVERNORS

Executive Board	Board of Governors
<u>President</u> Jay Hunn Hunn, Black & Merritt FH 401 N Main St Eufaula, OK 74432 PH 918-689-2553 FX 918-689-5027	<u>District I</u> Jeremy Sparks 6001 N. Grand Blvd. Oklahoma City, OK 73118 PH 405-843-5771 672 588 FX 405-842-9773 672 141
<u>President-Elect</u> David Murch Callaway-Smith-Cobb F H. 415 W. Main Marlow, OK 73055 PH 580-658-5455 FX 580-658-2048	<u>District II</u> Jim Dolton Collinsville Funeral Home 1302 W Main St Collinsville, OK 74021 PH 918-371-2516 FX 918-371-2517
<u>Vice-President</u> Richard Dugger Brown-Dugger Funeral Hm 1010 7th St Perry, OK 73077 PH 580-336-4444 FX 580-336-5710	<u>District III</u> Chanin Hoehn Fairview Funeral Home 221 N. Main St Fairview, OK 73737 PH 580-227-4722 FX 580-227-4727
<u>Secr/Treasurer</u> Bill Marshall Marshall Funeral Home 230 Flynn Alva, OK 73717 PH 580-327-2311 FX 580-327-4346	<u>District IV</u> Linda Newsom Lawton Ritter Gray Funeral H 632 SW C Ave. Lawton, OK 73501 PH 580-353-2940 FX 580-353-1113
<u>Immediate Past-President</u> Vernon Hoehn Fairview Funeral Home 221 N. Main St Fairview, OK 73737 PH 580-227-4722 FX 580-227-4727	<u>District V</u> Roger Clark Clark Funeral Service 305 E. Main St Tishomingo, OK 73460 PH: 580-371-2338 FX: 580-371-2330
<u>Policy Board Member</u> Brent Shain Mt. Olive Funeral Home Box 40 Hugo, OK 74743 PH 580-326-9627 FX 580-326-9629	<u>District VI</u> Tom Burkhart Talihina Funeral Home 204 2nd St Talihina, OK 74571 PH 918-567-4114 FX 918-567-3371
<u>Executive Director</u> Jay Baines Oklahoma Funeral Directors Assn. 6801 N. Broadway, Suite 106 Oklahoma City, OK 73116	PH: 405-843-0730 FX: 405-843-5404