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Form **990-EZ**Department of the Treasury
Internal Revenue Service**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

2008**Open to Public
Inspection****A** For the 2008 calendar year, or tax year beginning September 1, 2008, and ending AUGUST 31, 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 organizationThe Kappa Phi Club

Number and street (or P.O. box, if mail is not delivered to street address); Room/suite

2135 Snowbird Drive

City or town, state or country, and ZIP + 4

Manhattan, KS 66502**D** Employer identification number48-0949793**E** Telephone number(440) 327-4501**F** Group Exemption Number

▶

• 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.kappaphi.org**J** Organization type (check only one) — ☒ 501(c) (3) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**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. ▶ \$**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	27,997
	2	Program service revenue including government fees and contracts	2	22,967
	3	Membership dues and assessments	3	
	4	Investment income	4	5,376
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less: cost or other basis and sales expenses	5b	
	5c	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 ☐		
	a	Gross revenue (not including \$ of contributions reported on line 1)	6a	
b	Less: direct expenses other than fundraising expenses	6b		
6c	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	4,131	
b	Less: cost of goods sold	7b	3,621	
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	510	
8	Other revenue (describe ▶)	8		
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8.	9	56,850	
Expenses	10	Grants and similar amounts paid (attach schedule)	10	1,891
	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	-
	15	Printing, publications, postage, and shipping	15	10,363
	16	Other expenses (describe ▶ <u>See attached schedule</u>)	16	39,832
	17	Total expenses. Add lines 10 through 16	17	52,086
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	4,764
	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	145,767
	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	21	150,531

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.)

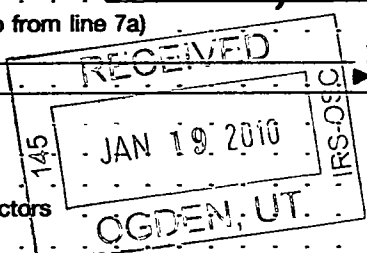
	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	140,103	22 145,511
23 Land and buildings	-	23 -
24 Other assets (describe ▶ <u>Jewelry inventory, Computer equipment</u>)	5,664	24 5,020
25 Total assets	145,767	25 -
26 Total liabilities (describe ▶)	-	26 -
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	145,767	27 150,531

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

Cat. No. 106421

Form 990-EZ (2008)

SCANNED JAN 22 2010



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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.)
What is the organization's primary exempt purpose? <u>Christian fellowship and leadership training</u>		
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.		
28	Evaluation and travel to chapters for visitations, workshops, leadership training, and printing of related materials Est. 400 (Grants \$) If this amount includes foreign grants, check here ☐	28a 1,000
29	Printing of national magazine and publications used by the organization to further its purpose Est. 1200 (Grants \$) If this amount includes foreign grants, check here ☐	29a 7,210
30	Preparation for and holding of national and regional conferences to train and develop leaders and to develop programming materials and printing of related materials Est. 400 (Grants \$) If this amount includes foreign grants, check here ☐	30a 31,680
31	Other program services (attach schedule) National service project and National title (Grants \$) If this amount includes foreign grants, check here ☐	31a 1,891
32	Total program service expenses (add lines 28a through 31a)	32 41,781

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
Jean Chiapas 291 Oakwood Ave., St. College, PA 16803	National Sponsor 12 hr	-0-	-0-	\$2,377.51
Katie Washburn 4100 W. Robinwood Dr., Muncie, IN 47304	Nat'l Prog Dir 10 hr	-0-	-0-	\$883.24
Karen Blackstone 629 Calhoun St., Zanesville, OH 43701	Nat'l President 12 hr	-0-	-0-	\$1,256.42
Melissa Hodek 5739 Hibernia Dr Apt A, Columbus, OH	Nat'l Treasurer 10 hr	-0-	-0-	\$901.60
Pamela Winslow 6652 Briarwood Pl., Zionsville, IN 46077	Nat'l Alum Sec. 5 hr	-0-	-0-	\$1,271.73
Michelle Martin Rt 1, Box 26, Wynnewood, OK 73098	Nat'l Pledge Coord. 5 hr	-0-	-0-	\$697.85
Kristen Lindsay 132 Wisteria Dr., Fremont, OH 43420	Nat'l Secretary 10 hr	-0-	-0-	\$436.32
Susan Meyers 16301 Seminole Creek Circle, Edmond, OK	Alpha Kora Coord. 12 hr	-0-	-0-	\$972.38
Suzanne Marques 130 Orchard Dr., Elida, OH 45807	Gamma Kora Coord 12 hr	-0-	-0-	\$627.37
Sandra Green 3848 E. 144th St., Cleveland, OH 94128	Zeta Kora Coord 12 hr	-0-	-0-	\$783.49
Susan Zack 1067 Hendrick Rd, Muskegon, MI	DIRECTOR 0 hr	-0-	-0-	-0-
Marilyn Evans 4314 W. 140th St., Cleveland, OH	DIRECTOR 0 hr	-0-	-0-	-0-
Barbara Van Westrienen 359 Park Ave, Parchment, MI	DIRECTOR 0 hr	-0-	-0-	-0-
Debbie Fuhrmann 6252 Denise Dr., N. Ridgerville, OH	Financial Advisor 2 hr	-0-	-0-	\$463.24
Debbie Porter 804 Bayberry NW, Massillon, OH	Publications Coord 2 hr	-0-	-0-	\$587.16

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		X
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	X	
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 section 6033(e) notice, reporting, and proxy tax requirements?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		X
36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N		X
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a -0-		
b Did the organization file Form 1120-POL for this year?		X
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?		X
b If "Yes," complete Schedule L, Part II and enter the total amount involved 38b NA		
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9 39a NA		
b Gross receipts, included on line 9, for public use of club facilities 39b NA		
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ -0- ; section 4912 ▶ -0- ; 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		X
c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ NA		
d Enter amount of tax on line 40c reimbursed by the organization ▶ NA		
e 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.		X
41 List the states with which a copy of this return is filed. ▶ NONE		
42a The books are in care of ▶ Sarah Bryant Telephone no. ▶ (918) 772-0186 Located at ▶ P.O. Box 914, Tahlequah, OK ZIP + 4 ▶ 74465		
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)?		X
If "Yes," enter the name of the foreign country: ▶ NA		
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.?		X
If "Yes," enter the name of the foreign country: ▶ NA		
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 ▶ 43 -0-		
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ		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		X

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.

- 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

	Yes	No
46		X
- 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II

	Yes	No
47		X
- 48 Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

	Yes	No
48		X
- 49a Did the organization make any transfers to an exempt non-charitable related organization?

	Yes	No
49a		X
- b If "Yes," was the related organization(s) a section 527 organization?

	Yes	No
49b		X
- 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	(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 is 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 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 Debbie J. Fuhrmann Date Jan. 11, 2010

Type or print name and title. Debbie J. Fuhrmann, National Financial Advisor

Paid Preparer's Use Only

Preparer's signature Debbie J. Fuhrmann Date Jan. 11, 2010 Check if self-employed ☐

Firm's name (or yours if self-employed), address, and ZIP + 4 National Financial Advisor EIN Preparer's Identifying Number (See instructions)

Phone no.

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

Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

48:0949793

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

[illegible]

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

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 include any "unusual grants.")	26,006	23,618	27,845	32,255	27,997	137,721
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	-	-	-	-	-	-
3 The value of services or facilities furnished by a governmental unit to the organization without charge	-	-	-	-	-	-
4 Total. Add lines 1-3	26,006	23,618	27,845	32,255	27,997	137,721
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						16,414
6 Public support. Subtract line 5 from line 4.						121,307

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	26,006	23,618	27,845	32,255	27,997	137,721
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	3,744	4,306	5,716	6,009	5,376	25,151
9 Net income from unrelated business activities, whether or not the business is regularly carried on	-	-	-	-	-	-
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	-	-	-	-	-	-
11 Total support. Add lines 7 through 10						162,872
12 Gross receipts from related activities, etc. (see instructions)					12	97,630
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	74.5	%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	85.6	%
16a 33 1/3 % support test—2008. If the organization did not check the box on line 13, and line 14 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization ☒			
b 33 1/3 % support test—2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization ☐			
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 test—2007. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 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 ☐			
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐			

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I.)

NA

Section A. Public Support

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 include 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 business under section 513						
4 Tax revenues levied for the organization'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 the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	%

- 19a 33 1/3 % support tests—2008.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3 %, and line 17 is not more than 33 1/3 %, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐
- b 33 1/3 % support tests—2007.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3 %, and line 18 is not more than 33 1/3 %, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐
- 20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► ☐

Part IV **Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. (see instructions)

NONE

The Kappa Phi Club
FID# 48-0949793
Form 990-EZ (2009)

Part 1, Line 16 Other Expenses

General Administrative	\$1,418
Executive Board Meetings	2,861
Chapter Visitations and Workshops	1,000
Korai Dues	2,334
National Council of Chapters	30,518
Insurance	404
Taxes and Licenses	40
Programming	1,162
Miscellaneous	<u>94</u>
Total Other Expenses	\$39,832

Part V, Line 34 – Changes to Organizational Documents

Revision of Article IX – Official Insignia and Materials; Section 1, Official Insignia, inserting Letter F to reflect the adoption of the lamb as the national emblem as follows:

Section 1. Official Insignia

A. Badges

1. The official badge for the Degree of the Pine shall be a small round badge with the Greek letters for Kappa Phi in gold on a background of green. This is surrounded by a band, one-half of which is blue with a pine tree on it, the other half white with a candle on it.
 2. The official badge for the Degree of the Light shall be a gold badge which is in the shape of a shield with a white band on a black background stretching diagonally from the bottom to the top and forming a background for the gold Greek letters, Kappa and Phi. In the lower sections the figure of a lighted candle and in the upper section a conventionalized rose. The edge may be plain, engraved, or have crown-set or close-set pearls with two emeralds in the upper points and one sapphire in the lower point.
 - a. This pin may be worn with a guard formed by the Greek letter of the local chapter, or it may be chained to another pin.
 - b. A special form of this pin having a small diamond set in the rose may be worn by those who have served, or are serving, as National Officers of the Kappa Phi Club.
 3. The recognition pin shall be composed of the plain Greek letters Kappa and Phi joined together without background and without jewels.
 4. The official jeweler shall be determined by the National Executive Board.
- B. The official Seal is centered with a lighted candle in a holder with the Greek letters, Kappa and Phi, at its base. These are encircled by the Kappa Phi aim, which in turn is surrounded by a pine bough and cone design.
- C. The Crest is made of a shield, silver in color, bearing a conventionalized pink rose in the upper right-hand corner, a green pine tree in the upper left-hand corner, and two chevrons of azure at the base; wreathes of silver and green at each side, twined together above the shield, above this a lighted silver candle in a golden holder with a golden glow-about the flame; below the shield the words "Kappa" and "Phi" on a scroll.
- D. The symbols shall be the pine tree, the lighted candle and the pink rose.
- E. The colors shall be the blue of the sky, the green of the pine, and pure white.
- F. The emblem shall be the lamb.

Revision of Article XIII – National Finance; Section 3, National Dues and Fees, adding:
A member who is excused from attending chapter meetings for an extended period (see Article III, Section 3.A.) is expected to pay Active dues for that period. Financial assistance may be requested. The addition is reflected below:

Section 2. National Dues and Fees

- A. The National Treasury shall be supported by national active dues and pledge and initiate fees consisting of an amount approved by the National Council of Chapters by a two-thirds majority vote. Active dues shall be assessed annually. Active chapters have the option of paying annually no later than October 25 or in two equal installments, the first payment due no later than October 25 and the second payment due no later than February 28. Pledge and initiate fees shall be paid to the National Treasurer no later than one week following each pledging and initiation service. These amounts shall include a one-year subscription to the *Candle Beam*. The Korai treasuries shall receive an amount (not less than ten percent) of the annual national dues and fees as determined by the National Council of Chapters. A member who is excused from attending chapter meetings for an extended period (see ARTICLE III, Section 3.A.) is expected to pay Active dues for that period. Financial assistance may be requested.
- B. All chapters shall pay the fees and dues prescribed by the National Council of Chapters or are subject to suspension.
- C. For policy pertaining to alumnae dues, refer ARTICLE XVII of the Constitutional Bylaws.