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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

2008Open to Public
Inspection**A** For the **2008** calendar year, or tax year beginning **OCT 1, 2008** and ending **SEP 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**INDEPENDENT INSURANCE AGENTS ASSOCIATION
OF GREATER OKLAHOMA CITY, INC.**

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

P.O. BOX 18577

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

OKLAHOMA CITY, OK 73154**D** Employer identification number**73-0381354****E** Telephone number**405-843-5678****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: ▶ **N/A****J** Organization type (check only one) — ☒ 501(c)(6) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**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 ▶ **\$ 434,038.****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	284,603.
	3	Membership dues and assessments	3	13,800.
	4	Investment income	4	21,908.
	5a	Gross amount from sale of assets other than inventory STMT 2	5a	113,727.
	b	Less: cost or other basis and sales expenses	5b	120,437.
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach schedule)	5c	<6,710.>
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>		
	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)	6c		
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 ▶ _____)	8		
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	313,601.	
Expenses	10	Grants and similar amounts paid (attach schedule) STMT 3	10	187,545.
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	144,000.
	13	Professional fees and other payments to independent contractors	13	6,473.
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	4,406.
	16	Other expenses (describe ▶ SEE STATEMENT 1)	16	88,648.
	17	Total expenses. Add lines 10 through 16	17	431,072.
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	<117,471.>
	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	865,513.
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	748,042.	

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	865,513.	748,042.
23 Land and buildings		
24 Other assets (describe ▶ _____)		
25 Total assets	865,513.	748,042.
26 Total liabilities (describe ▶ _____)	0.	0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	865,513.	748,042.

832171
12-17-08

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

Form **990-EZ** (2008)

SCANNED SEP 15 2010

Form 990-EZ (2008)

OF GREATER OKLAHOMA CITY, INC.

73-0381354

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Expenses

What is the organization's primary exempt purpose? SEE STATEMENT 5

(Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts; optional for others.)

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.

28a	187,545.
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(Grants \$ 187,545.) If this amount includes foreign grants, check here

29a 243,527.

(Grants \$) If this amount includes foreign grants, check here

30

(Grants \$) If this amount includes foreign grants, check here

31 Other program services (attach schedule)

(Grants \$) If this amount includes foreign grants, check here

32 **Total program service expenses** (add lines 28a through 31a)

32	431,072.
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Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated (See the instructions for Part IV.)

[illegible]

**INDEPENDENT INSURANCE AGENTS ASSOCIATION
OF GREATER OKLAHOMA CITY, INC.**

Form 990-EZ (2008)

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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.		
35a	Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?		X
35b	If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Sch. N		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. 0.		
37b	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
38b	If "Yes," complete Schedule L, Part II and enter the total amount involved N/A		
39	Section 501(c)(7) organizations. Enter:		
39a	Initiation fees and capital contributions included on line 9 N/A		
39b	Gross receipts, included on line 9, for public use of club facilities 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	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 N/A		
40c	Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 0.		
40d	Enter amount of tax on line 40c reimbursed by the organization 0.		
40e	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. OK		
42a	The books are in care of KENT CARLIN Telephone no. 405-843-5678		
	Located at PO BOX 18577, OKLAHOMA CITY, OK ZIP + 4 73154		
42b	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: 		
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
42c	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: 		
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here N/A		
	and enter the amount of tax-exempt interest received or accrued during the tax year 43		
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		

Form 990-EZ (2008)

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
- 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 the organization make any transfers to an exempt non-charitable related organization?
- b If "Yes," was the related organization(s) a section 527 organization?
- 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."

	Yes	No
46		
47		
48		
49a	X	
49b		X

(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
N/A				
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
N/A		
Total number of other independent contractors each receiving over \$100,000		

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.

Sign Here: *[Signature]* Date: 8/11/10

Signature of officer: *[Signature]*

Type or print name and title: R. Charles K. Carlin, Jr. President

Paid Preparer's Use Only: Preparer's signature: *[Signature]* Date: 08/07/10 Check if self-employed: ☐ Preparer's Identifying Number (See instr.):

Firm's name (or yours if self-employed), address, and ZIP + 4: EIDE BAILLY LLP
1601 NW EXPRESSWAY, SUITE 1900
OKLAHOMA CITY, OK 73118

EIN: ☐ Phone no.: 405-478-3334

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

FORM 990-EZ	OTHER EXPENSES	STATEMENT	1
DESCRIPTION		AMOUNT	
TRAINING & TRAVEL		18,721.	
INSURANCE		26,891.	
COMMUNITY & SOCIAL SERVICES		18,500.	
MEETING		20,306.	
MISC.		4,230.	
TOTAL TO FORM 990-EZ, LINE 16		88,648.	

FORM 990-EZ	GAIN (LOSS) FROM PUBLICLY TRADED SECURITIES			STATEMENT 2
DESCRIPTION	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	NET GAIN OR (LOSS)
MID FIRST TRUST COMPANY	113,727.	120,437.	0.	<6,710.>
TO FORM 990-EZ, LINE 5	113,727.	120,437.	0.	<6,710.>

FORM 990-EZ	CASH GRANTS AND ALLOCATIONS	STATEMENT	3
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CLASS OF ACTIVITY/DONEE'S NAME AND ADDRESS	DONEE'S RELATIONSHIP	AMOUNT
GRANT ZOO PROJECTS PO BOX 18424 OKLAHOMA CITY, OK 73154	NONE	16,650.
GRANT CRIME STOPPERS 701 COLCORD DRIVE OKLAHOMA CITY, OK 73154	NONE	2,500.
GRANT OKC SCHOOLS-BUS DRIVER 900 N. KLEIN OKLAHOMA CITY, OK 73106	NONE	15,300.
GRANT OKC SCHOOLS FOUNDATION 5225 N. SHARTEL AVE. STE 201 OKLAHOMA CITY, OK 73118	NONE	26,000.
GRANT MISC. OKC SCHOOL PROJECTS 900 N. KLEIN OKLAHOMA CITY, OK 73106	NONE	29,518.
GRANT PC SCHOOLS FOUNDATION 5401 NW 40TH STREET OKLAHOMA CITY, OK 73122	NONE	42,000.
GRANT PC SCHOOLS PROJECTS 5401 NW 40TH STREET OKLAHOMA CITY, OK 73122	NONE	3,000.
GRANT PC SCHOOLS-BUS DRIVER 5401 NW 40TH STREET OKLAHOMA CITY, OK 73122	NONE	7,600.
GRANT BIG BROTHERS/BIG SISTERS 4101 PERMIMETER CENTER DR. OKLAHOMA CITY, OK 73112	NONE	2,500.

INDEPENDENT INSURANCE AGENTS ASSOCIATION

73-0381354

GRANT
MISCELLANEOUS PROJECTS

NONE

4,477.

GRANT
IIAA FOUNDATION
PO BOX 18424
OKLAHOMA CITY, OK 73154

NONE

38,000.

TOTAL INCLUDED ON FORM 990-EZ, LINE 10

187,545.

FORM 990-EZ

INFORMATION REGARDING TRANSFERS
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 4

- 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

990-EZ PG 2

STATEMENT 5

TO PROMOTE THE IMPROVEMENT OF BUSINESS CONDITIONS, TO SERVICE THE INSURANCE NEEDS OF TAX SUPPORTED GOVERNMENTAL ENTITIES, TO MAINTAIN A HIGH STANDARD OF INTEGRITY AND TO COOPERATE WITH STATE AND CITY AUTHORITIES IN THE REDUCTION OF FIRE LOSSES AND IN ACCIDENT PREVENTION.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1)

Part II	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).	
Type or print File by the extended due date for filing the return. See instructions	Name of Exempt Organization INDEPENDENT INSURANCE AGENTS ASSOCIATION OF GREATER OKLAHOMA CITY, INC.	Employer identification number 73-0381354
	Number, street, and room or suite no. If a P O box, see instructions. P.O. BOX 18577	For IRS use only
	City, town or post office, state, and ZIP code For a foreign address, see instructions OKLAHOMA CITY, OK 73154	

Check type of return to be filed (File a separate application for each return)

- ☐ Form 990 ☒ Form 990-EZ ☐ Form 990-T (sec 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ 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 previously filed Form 8868.

KENT CARLIN

- The books are in the care of ☒ **PO BOX 18577 - OKLAHOMA CITY, OK 73154**

Telephone No **405-843-5678**

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 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 I request an additional 3-month extension of time until **AUGUST 15, 2010**
 5 For calendar year ☐, or other tax year beginning **OCT 1, 2008**, and ending **SEP 30, 2009**
 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 REQUIRED TO COLLECT THE INFORMATION NECESSARY FOR FILING A COMPLETE AND ACCURATE RETURN.

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 with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	\$ N/A

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☐ Title ☐ Date ☐