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Form **990-EZ**

Short Form

Return of Organization Exempt From Income Tax

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

OMB No 1545-1150

2008**Open to Public Inspection**Department of the Treasury
Internal Revenue Service

- 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 Dec 1, 2008, **and ending** Nov 30, 2009

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Termination
☐ Amended return
☐ Application pending

C Name of organization: **UNITY LODGE 148 AF & AM**
 Number and street (or P.O. box, if mail is not delivered to street address): **10 MASON DRIVE**
 City or town, state or country, and ZIP + 4: **NEW BRITAIN CT 06052**

D Employer identification number: **10-0004457**

E Telephone number: **(860) 870-9268**

F Group Exemption Number: **▶**

G Accounting method: ☒ Cash ☐ Accrual
 Other (specify): **▶**

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

I Website: **▶ N/A**

J Organization type (check only one) — ☒ 501(c) (10) (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. **▶ \$ 115,628.**

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

1 Contributions, gifts, grants, and similar amounts received	1	250.
2 Program service revenue including government fees and contracts	2	
3 Membership dues and assessments	3	8,395.
4 Investment income	4	18,129.
5a Gross amount from sale of assets other than inventory	5a	88,842.
b Less: cost or other basis and sales expenses	5b	101,657.
c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (att sch)	5c	-12,815.
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	
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 ▶ MISCELLANEOUS INCOME)	8	12.
9 Total revenue (add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8)	9	13,971.
10 Grants and similar amounts paid (attach schedule)	10	
11 Benefits paid to or for members	11	
12 Salaries, other compensation, and employee benefits	12	
13 Professional fees and other payments to independent contractors	13	550.
14 Occupancy, rent, utilities, and maintenance	14	2,840.
15 Printing, publications, postage, and shipping	15	
16 Other expenses (describe ▶ See Other Expenses Statement)	16	29,716.
17 Total expenses (add lines 10 through 16)	17	33,106.
18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-19,135.
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	623,437.
20 Other changes in net assets or fund balances (attach explanation) See L-20 Stmt	20	62,153.
21 Net assets or fund balances at end of year Combine lines 18 through 20	21	666,455.

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	623,437.	666,455.
23 Land and buildings	0.	0.
24 Other assets (describe ▶ _____)	0.	0.
25 Total assets	623,437.	666,455.
26 Total liabilities (describe ▶ _____)	0.	0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	623,437.	666,455.

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

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Part V Other Information (Note the statement requirement in General Instruction V.)

	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 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?		
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	
39 501(c)(7) organizations Enter.		
a Initiation fees and capital contributions included on line 9	39a	
b Gross receipts, included on line 9, for public use of club facilities	39b	
40a 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under: section 4911 ▶ _____; section 4912 ▶ _____, section 4955 ▶ _____		
b 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	
c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958		
d Enter amount of tax on line 40c reimbursed by the organization		
e 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 ▶ <u>Connecticut</u>		

42a The books are in care of ▶ BILL BONNEY Telephone no. ▶ (860) 930-7048
 Located at ▶ 10 MASON DR NEW BRITAIN CT ZIP + 4 ▶ 06052

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)?
 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 a Foreign Bank and Financial Accounts**.

c At any time during the calendar year, did the organization maintain an office outside of the U.S.?
 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

▶ **43**

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

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

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	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and 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.'

(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 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: <i>William A. Bonney, Jr.</i> Date: <i>2/2/10</i>		Type or print name and title: <i>WILLIAM A. BONNEY, JR. TREASURER</i>	
Paid Preparer's Use Only	Preparer's signature: <i>Frank D. Marrocco CPA</i>	Date: <i>02/01/10</i>	Check if self-employed: ☒	Preparer's Identifying Number (See instructions): <i>P00106988</i>
	Firm's name (or yours if self-employed): <i>FRANK D. MARROCCO, CPA</i>		EIN: <i>06-1261120</i>	
	Firm's address, and ZIP + 4: <i>142 WEST MAIN STREET NEW BRITAIN CT 06052</i>		Phone no: <i>(860) 229-7479</i>	

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

☒ Yes ☐ No

BAA

Form 990-EZ (2008)

Form 990-EZ, Part I, Line 16

Other Expenses Statement

Other expenses (describe)

SUPPLIES	4,870.
DONATIONS	10,050.
DUES & ASSESSMENTS	8,145.
CONFERENCES & MEETINGS	6,651.
DONATIONS	
DUES & ASSESSMENTS	
Total	29,716.

Form 990-EZ, Page 1, Part I, Line 20

Other Changes in Net Assets or Fund Balances

Description	Amount
INCREASE IN MARKET VALUE OF SECURITIES	97,153.
TRANSFERS TO MASONIC TEMPLE CORPORATION	-35,000.
Total	62,153.

Supporting Statement of:

Form 990-EZ/Line 5a

Description	Amount
1290.047 SH FIDELITY NORDIC	23,040.
794.552 SH BARON PARTNERS FUND	7,000.
262.398 SH BARON ASSET FUND	10,000.
2457.283 SH AMANA MUTUAL FUND TRUST GROWTH	48,802.
Total	<u>88,842.</u>

Supporting Statement of:

Form 990-EZ/Line 5b

Description	Amount
1290.047 SH FIDELITY NORDIC	38,590.
794.552 SH BARON PARTNERS FUND	10,854.
262.398 SH BARON ASSET FUND	10,840.
2457.283 SH AMANA MUTUAL FUND TRUST GROWTH	41,373.
Total	<u>101,657.</u>