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Form **990-EZ****Short Form**  
**Return of Organization Exempt From Income Tax**

OMB No 1545-1150

**2009**Department of the Treasury  
Internal Revenue Service

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 \$500,000 and total assets less than \$1,250,000 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.

**Open to Public Inspection****A For the 2009 calendar year, or tax year beginning , 2009, and ending ,**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type. See Specific Instructions.	<b>C</b> ANCIENT & ACCEPTED SCOTTISH RITE OF FREEMASONRY PO BOX 12745 WINSTON SALEM, NC 27117-2745	<b>D</b> Employer identification number 23-7144207 <b>E</b> Telephone number (336) 723-1217 <b>F</b> Group Exemption Number 0095
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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: ► N/A

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

**J** Tax-exempt status (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 Form 990-EZ or Form 990 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 \$500,000 or more, file Form 990 instead of Form 990-EZ. ► \$ 125,137.

**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 7,629.
	2 Program service revenue including government fees and contracts	2
	3 Membership dues and assessments	3 74,161.
	4 Investment income	4 39,260.
	5a Gross amount from sale of assets other than inventory	5a
	b Less cost or other basis and sales expenses	5b 14.
	c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c -14.
	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 2,247.
b Less direct expenses other than fundraising expenses	6b 1,084.	
c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c 1,163.	
7a Gross sales of inventory, less returns and allowances	7a 360.	
b Less cost of goods sold	7b 503.	
c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c -143.	
8 Other revenue (describe ► See Statement 2)	8 1,480.	
9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9 123,536.	
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 45,649.
	13 Professional fees and other payments to independent contractors	13 4,050.
	14 Occupancy, rent, utilities, and maintenance	14 30,108.
	15 Printing, publications, postage, and shipping	15 5,710.
	16 Other expenses (describe ► See Statement 3)	16 36,624.
	17 Total expenses. Add lines 10 through 16	17 122,141.
NET ASSETS	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18 1,395.
	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 1,093,747.
	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 1,095,142.

**Part II Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 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	1,138,683.	22 1,139,504.
23 Land and buildings		23
24 Other assets (describe ► See Statement 4)	4,260.	24 2,556.
25 Total assets	1,142,943.	25 1,142,060.
26 Total liabilities (describe ► See Statement 5)	49,196.	26 46,918.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	1,093,747.	27 1,095,142.

BAA For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Form 990-EZ (2009)

## Expenses

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

28

28 a

29

**29 a**

30

30 a

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31 a)

32

**Part V Other Information** (Note the statement requirements in the instrs for Part V.) See Statement 7

	Yes	No
<b>33</b> Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed description of each activity		X
<b>34</b> Were any changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the changes		X
<b>35</b> 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 why the organization did not report the income on Form 990-T		
<b>a</b> Did the organization have unrelated business income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?		X
<b>b</b> If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>36</b> Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N		X
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions <b>37a</b> 0.		
<b>b</b> Did the organization file <b>Form 1120-POL</b> for this year?		X
<b>38a</b> 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 outstanding at the end of the period covered by this return?		X
<b>b</b> If 'Yes,' complete Schedule L, Part II and enter the total amount involved <b>38b</b> N/A		
<b>39</b> Section 501(c)(7) organizations. Enter.		
<b>a</b> Initiation fees and capital contributions included on line 9 <b>39a</b> N/A		
<b>b</b> Gross receipts, included on line 9, for public use of club facilities <b>39b</b> N/A		
<b>40a</b> Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 <b>N/A</b> , section 4912 <b>N/A</b> , section 4955 <b>N/A</b>		
<b>b</b> Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I <b>40b</b>		
<b>c</b> Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <b>0.</b>		
<b>d</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization <b>0.</b>		
<b>e</b> 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 <b>40e</b>		X
<b>41</b> List the states with which a copy of this return is filed <b>None</b>		

**42a** The organization's books are in care of **C TRUETT CHADWICK, JR** Telephone no **(336) 723-1217**  
 Located at **34 MILLER STREET WINSTON SALEM NC** ZIP + 4 **27103**

	Yes	No
<b>b</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		X
See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1, Report of a Foreign Bank and Financial Accounts.</b>		
<b>c</b> 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		X

**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** N/A

	Yes	No
<b>44</b> Did the organization maintain any donor advised funds? If 'Yes,' Form 990 must be completed instead of Form 990-EZ		X
<b>45</b> 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 and section 4947(a)(1) nonexempt charitable trusts only. All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b 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
<b>46</b>		
<b>47</b>		
<b>48</b>		
<b>49a</b>		
<b>49b</b>		

**47** Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II

**48** Is the organization 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 a section 527 organization?

**50** Complete this table for the organization's 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.'

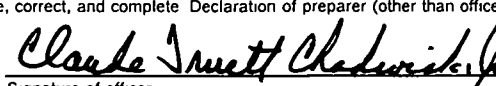
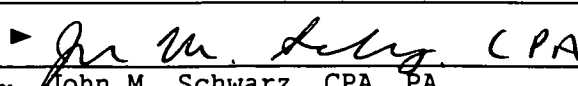
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowances
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**f** Total number of other employees paid over \$100,000 ▶

**51** Complete this table for the organization's 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
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**d** Total number of other independent contractors each receiving over \$100,000 ▶

<b>Sign Here</b>	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.			
	<b>Signature of officer</b> 		<b>Date</b> 06/16/10	
<b>Paid Preparer's Use Only</b>	<b>Type or print name and title</b> CLAUDE TRUETT CHADWICK, JR., SECRETARY			
	<b>Preparer's signature</b> 	<b>Date</b> 6/14/10	<b>Check if self-employed</b> <input type="checkbox"/>	<b>Preparer's Identifying Number (See instructions)</b> N/A
	<b>Firm's name (or yours if self-employed), address, and ZIP + 4</b> John M. Schwarz, CPA, PA 100 East Lake Drive Greensboro, NC 27403		<b>EIN</b> N/A	<b>Phone no</b> (336) 275-0018
	<b>May the IRS discuss this return with the preparer shown above? See instructions.</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

BAA

Form 990-EZ (2009)

**Statement 1**  
**Form 990-EZ, Part I, Line 5c**  
**Net Gain (Loss) from Noninventory Sales**

Publicly Traded Securities

Gross Sales Price: 0.  
 Cost or Other Basis: 14.

Total Gain (Loss) Publicly Traded Securities \$ -14.

Total Net Gain (Loss) From Noninventory Sales \$ -14.

**Statement 2**  
**Form 990-EZ, Part I, Line 8**  
**Other Revenue**

Miscellaneous Refund

Total \$ 1,480.  
 Total \$ 1,480.

**Statement 3**  
**Form 990-EZ, Part I, Line 16**  
**Other Expenses**

Almoners Fund	\$ 1,900.
Awards	1,538.
Conferences, Conventions, and Meetings	719.
Contributions Expense	780.
Depreciation	1,704.
Insurance	1,503.
Miscellaneous Expense	840.
Office Expenses	320.
Per Capita Tax	10,254.
Program Meals	208.
Reunions Expenses	1,606.
Scottish Rite Fund-Assessment	4,388.
Scottish Rite Fund-Members	2,667.
Supreme Council Billing	1,685.
Supreme Council Expense	3,334.
Telephone/Internet	3,178.
Total	\$ <u>36,624.</u>

**Statement 4**  
**Form 990-EZ, Part II, Line 24**  
**Other Assets**

	<u>Beginning</u>	<u>Ending</u>
Machinery and Equipment	\$ 4,260.	\$ 2,556.
Total	\$ <u>4,260.</u>	\$ <u>2,556.</u>

**Statement 5**  
**Form 990-EZ, Part II, Line 26**  
**Total Liabilities**

	<u>Beginning</u>	<u>Ending</u>
Accounts Payable and Accrued Expenses	\$ 576.	\$ 0.
Deferred Revenue	48,620.	46,918.
Total	<u>\$ 49,196.</u>	<u>\$ 46,918.</u>

**Statement 6**  
**Form 990-EZ, Part III**  
**Organization's Primary Exempt Purpose**

FRATERNAL ORGANIZATION TO PROMOTE UNDERSTANDING OF AND PARTICIPATION IN FREE MASONRY.

**Statement 7**  
**Form 990-EZ, Part V**  
**Regarding Transfers Associated with Personal Benefit Contracts**

- (a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? No
- (b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? No

The Scottish Rite in the Valley of Winston-Salem consists of four Bodies, namely: Lodge of Perfection, Chapter of Rose Croix, Council of Kadosh and Consistory; each has its own officers, except the Secretary, Treasurer and Almoner, which are the same for the Valley and each of the four Bodies.

C. Truett Chadwick, Jr., Secretary  
2920 Hope Valley Road  
Winston-Salem, N. C. 27106

Hugh W. Phillips, Jr., Assistant Secretary  
1935 Butler St.  
Winston-Salem, N. C. 27107

Frank L. Collins, Treasurer  
2201 Sallies Lane  
Winston-Salem, N. C. 27104

Charles E. Scott, Jr., Almoner  
349 Knollwood St.  
Winston-Salem, N. C. 27104

SOVEREIGN GRAND INSPECTOR GENERAL'S ADVISORY CONFERENCE

Charles E. Scott, Jr., Chairman  
Winston-Salem, N. C. 27104

William N. Teague  
Clemmons, N. C. 27042

James M. Earnhardt  
Salisbury, N. C. 28144

Danial M. Hogue  
Salisbury, N. C. 28147

Hugh W. Phillips, Jr.  
Winston-Salem, N. C. 27107

Ray C. Finney  
Thomasville, N. C. 27360

Charles H. White  
Winston-Salem, N. C. 27106

Richard J. Smith, Jr.  
Pilot Mountain, N. C. 27041

Robert L. Clendenin  
Winston-Salem, N. C. 27127

William R. Adams  
Kernersville, N. C. 27285

George G. Kalamaras  
Winston-salem, N. C. 27103

C. Truett Chadwick, Jr., Secretary, Ex-Officio  
Winston-Salem, N. C. 27106



## TRUSTEES

Ervin W. Allen  
Lexington, N. C. 27295

Robert L. Clendenin  
Winston-Salem, N. C. 27127

A. Vernon Darr, Sr.  
Lexington, N. C. 27292

Graham W. Pervier  
Reidsville, N. C. 27320

Clifford T. Pranke  
Kernersville, N. C. 27284

### 1. WINSTON-SALEM LODGE OF PERFECTION

Ervin W. Allrn, Venerable Master  
Lexington, N. C. 27295

(Vacant due to death), Senior Warden

Randall E. Ogburn, Junior Warden  
Winston-salem, N. C. 27105

William R. Adams, Orator  
Kernersville, N. C. 27285

James M. Earnhardt, Prelate  
Salisbury, N. C. 28144

Graham Pervier, Master of Ceremonies  
Reidsville, N. C. 27320

Joel A. Black, Jr., Expert  
Lewisville, N. C. 27023

Brandon R. Faircloth, Assistant Expert  
Spencer, N. C. 28159

A. Vernon Darr, Sr., Capt. of The Host  
Lexington, N. C. 27292

Thomas J. Jolly, Jr., Tiler  
Lexington, N. C. 27292

### 2. WINSTON-SALEM CHAPTER OF ROSE CROIX

Danial M. Hogue, Jr., Wise Master  
Salisbury, N. C. 28147

Andrew V. Darr, Jr., Senior Warden  
Thomasville, N. C. 27360

T. W. Carlton, Junior Warden  
Winston-Salem, N. C. 27107

Josiah P. Link, Orator

Douglas L. O'Kelley, Master of Ceremonies  
Thomasville, N. C. 27360

Andrew Vernon Darr, Sr., Expert  
Lexington, N. C. 27292

Jeffery L. Main, Assistant Expert  
Deep Gap, N. C. 28618

Ervin W. Allen, Standard Bearer  
Lexington, N. C. 27292

James M. Earnhardt, Guardian of The Temple  
Salisbury, N. C. 28144

Richard C. Prest, Tiler  
Salisbury, N. C. 28145

### 3. WINSTON-SALEM COUNCIL OF KADOSH

Ray C. Finney, Commander  
Thomasville, N. C. 27360

Joseph P. Link, 1st Lt. Commander  
Statesville, N. C. 28677

Danial M. Hogue, Jr., 2nd Lt. Commander  
Salisbury, N. C. 28147

James M. Earnhardt, Chancellor  
Salisbury, N. C. 28144

Alvin Hardy, Orator  
Boone, N. C. 28607

Douglas L. O'Kelley, Master of Ceremonies  
Thomasville, N. C. 27360

Andrew V. Darr, Sr., Turcopilier  
Lexington, N. C. 27292

Brandon R. Faircloth, Draper  
Spencer, N. C. 28159

Jeffery L. Main, 1st Deacon  
Deep Gap, N. C. 28618

Andrew V. Darr, Jr., 2nd Deacon  
Thomasville, N. C. 27360

Robert L. Clendenin, Bear of Beauseant  
Winston-Salem, N. C. 27127

Kirby Matthews, Jr., Bearer of White Standard  
Denton, N. C. 27239

Ervin W. Allen, Jr., Bearer of Black Standard  
Lexington, N. C. 27292

Graham W. Pervier, Lt. of The Guard  
Reidsville, N. C. 27320

John W. Boner, Sentinel  
Winston-Salem, N. C. 27127

4. WINSTON-SALEM CONSISTORY

Charles H. White, Master of the Kadosh  
Winston-salem, N. C. 27106

Ervin W. Allen, Prior  
Lexington, N. C. 27292

Andrew V. Darr, Jr., Preceptor  
Thomasville, N. C. 27360

James M. Earnhardt, Chancellor  
Salisbury, N. c. 28144

Kirby Matthews, Jr., Minister of State  
Denton, N. C. 27239

Joseph P. Link, Prelate  
Statesville, N. C. 28677

Danial M. Hogue, Jr., Master of Ceremonies  
Salisbury, N. C. 28147

John W. Boner, Expert  
Winston-salem, N. C. 27127

Joel A. Black, Jr., Assistant Expert  
Lewisville, N. C. 27023

Douglas L. O'Kelley, Captain of The Guard  
Thomasville, N. C. 27360

A. Vernon Darr, Sr., Tiler  
Lexington, N. C. 27292