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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 \$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

OMB No 1545-1150

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

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

Please use IRS label or print or type See Specific Instructions

**C Name of organization**ANCIENT AND ACCEPTED SCOTTISH RITE  
VALLEY OF NORFOLK

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

P.O. BOX 9407

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

NORFOLK, VA 23505-0407

**D Employer identification number**

54-0373255

**E Telephone number**

(757) 489-1076

**F Group Exemption Number**

▶ 0095

• 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 Tax-exempt status** (check only one) — ☒ 501(c) ( 10 ) ◀ (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 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** ▶ \$ 250,224.**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I)

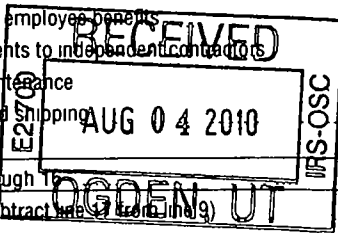
Revenue	1	Contributions, gifts, grants, and similar amounts received	1	4,566.
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	108,175.
	4	Investment income	4	24,569.
	5a	Gross amount from sale of assets other than inventory STMT 3	5a	110,000.
	b	Less cost or other basis and sales expenses	5b	110,010.
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	<10.>
	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 STMT 7	7a	2,914.	
b	Less cost of goods sold	7b	2,821.	
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	93.	
8	Other revenue (describe ▶ _____)	8		
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	137,393.	
Expenses	10	Grants and similar amounts paid (attach schedule) STMT 6 STMT 4	10	28,135.
	11	Benefits paid to or for members	11	3,850.
	12	Salaries, other compensation, and employee benefits	12	9,799.
	13	Professional fees and other payments to independent contractors	13	900.
	14	Occupancy, rent, utilities, and maintenance	14	75,620.
	15	Printing, publications, postage, and shipping	15	5,881.
	16	Other expenses (describe ▶ SEE STATEMENT 1)	16	16,636.
	17	<b>Total expenses.</b> Add lines 10 through 16	17	140,821.
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	<3,428.>
	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	835,754.
	20	Other changes in net assets or fund balances (attach explanation) SEE STATEMENT 5	20	142,657.
	21	Net assets or fund balances at end of year Combine lines 18 through 20	21	974,983.

**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	108,535.	22 114,863.
23 Land and buildings		23
24 Other assets (describe ▶ SEE STATEMENT 2)	727,219.	24 860,120.
25 Total assets	835,754.	25 974,983.
26 Total liabilities (describe ▶ _____)	0.	26 0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	835,754.	27 974,983.

SCANNED AUG 19 2010



## Form 990-EZ (2009)

# VALLEY OF NORFOLK

54-0373255

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## Expenses

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

28 SEE STATEMENT 9

28a

29

29a

30

**30a**

**31 Other program services (attach schedule)**

31a

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

32

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

[illegible]

932172  
02-08-10

Form **990-EZ** (2009)

**ANCIENT AND ACCEPTED SCOTTISH RITE  
VALLEY OF NORFOLK**

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

		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	<b>33</b>		<b>X</b>
<b>34</b> Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	<b>34</b>		<b>X</b>
<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 gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?	<b>35a</b>		<b>X</b>
<b>b</b> If "Yes," has it filed a tax return on Form 990-T for this year?	<b>35b</b>	<b>N/A</b>	
<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 Sch. N	<b>36</b>		<b>X</b>
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions <span style="float:right">▶ <b>37a</b> 0.</span>			
<b>b</b> Did the organization file Form 1120-POL for this year?	<b>37b</b>		<b>X</b>
<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?	<b>38a</b>		<b>X</b>
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved	<b>38b</b>	<b>N/A</b>	
<b>39</b> Section 501(c)(7) organizations Enter			
<b>a</b> Initiation fees and capital contributions included on line 9	<b>39a</b>	<b>N/A</b>	
<b>b</b> Gross receipts, included on line 9, for public use of club facilities	<b>39b</b>	<b>N/A</b>	
<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>N/A</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 <span style="float:right">▶ <b>N/A</b></span>			
<b>d</b> Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization <span style="float:right">▶ <b>N/A</b></span>			
<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>		<b>X</b>
<b>41</b> List the states with which a copy of this return is filed ▶ <b>NONE</b>			
<b>42a</b> The organization's books are in care of ▶ <b>THE ORGANIZATION</b> Telephone no ▶ <b>(757) 489-1076</b> Located at ▶ <b>7001 GRANBY STREET, NORFOLK, VA</b> ZIP + 4 ▶ <b>23505</b>			
<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 ▶ _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.	<b>42b</b>		<b>X</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 ▶ _____	<b>42c</b>		<b>X</b>
<b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here <span style="float:right">▶ <input type="checkbox"/></span> and enter the amount of tax-exempt interest received or accrued during the tax year <span style="float:right">▶ <b>43</b> <b>N/A</b></span>			
<b>44</b> Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	<b>44</b>		<b>X</b>
<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	<b>45</b>		<b>X</b>

Form 990-EZ (2009)

ANCIENT AND ACCEPTED SCOTTISH RITE

Form 990-EZ (2009)

VALLEY OF NORFOLK

54-0373255

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**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
- 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."

	Yes	No
46		
47		
48		
49a		
49b		

(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

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."

N/A

(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation

d 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 <i>T. Dudley Myers</i>	Date 7-28-2010	
	T. DUDLEY MYERS, SECRETARY Type or print name and title		
Paid Preparer's Use Only	Preparer's signature <i>Douglas A. Hall</i>	Date 07/27/10	Check if self-employed <input checked="" type="checkbox"/>
	Firm's name (or yours if self-employed), address and ZIP + 4 DOUGLAS A. HALL, CPA 2251 KENDALL STREET VIRGINIA BEACH, VA 23451	Preparer's identifying number (See instr.) EIN Phone no (757) 412-2750	

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

☒ Yes ☐ No

Form 990-EZ (2009)

FORM 990-EZ	OTHER EXPENSES	STATEMENT	1
DESCRIPTION		AMOUNT	
PAYROLL TAXES		730.	
INSURANCE		701.	
OFFICE SUPPLIES		3,569.	
REUNION EXPENSES		1,239.	
CONFERENCES & WORKSHOPS		7,533.	
MISCELLANEOUS		353.	
DONATIONS		1,510.	
TELEPHONE		1,001.	
TOTAL TO FORM 990-EZ, LINE 16		16,636.	

FORM 990-EZ	OTHER ASSETS	STATEMENT	2
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
INVESTMENTS - PUBLICLY TRADED SECURITIES	727,219.	860,120.	
TOTAL TO FORM 990-EZ, LINE 24	727,219.	860,120.	

FORM 990-EZ	GAIN (LOSS) FROM PUBLICLY TRADED SECURITIES			STATEMENT	3
DESCRIPTION	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	NET GAIN OR (LOSS)	
FHLMC CALL NTS 5.15%	35,000.	35,005.	0.	<5.>	
FORD MOTOR CREDIT CO NTS 6.0%	25,000.	25,000.	0.	0.	
FHLMC MTN CALLABLE 5.0%	50,000.	50,005.	0.	<5.>	
TO FORM 990-EZ, LINE 5	110,000.	110,010.	0.	<10.>	

FORM 990-EZ PAYMENTS TO AFFILIATES STATEMENT 4

AFFILIATE'S NAME

AFFILIATES ADDRESS

THE SUPREME COUNCIL

1733 16TH STREET, NW  
WASHINGTON, DC 20009

PURPOSE OF PAYMENT

AMOUNT

PER CAPITA DUES

13,236.

AFFILIATE'S NAME

AFFILIATES ADDRESS

SCOTTISH RITE FOUNDATION OF VIRGINIA

P.O. BOX 5  
SHAWSVILLE, VA 24162

PURPOSE OF PAYMENT

AMOUNT

ANNUAL ASSESSMENT

7,045.

AFFILIATE'S NAME

AFFILIATES ADDRESS

NORFOLK SCOTTISH RITE FOUNDATION

7001 GRANBY STREET  
NORFOLK, VA 23505

PURPOSE OF PAYMENT

AMOUNT

ANNUAL ASSESSMENT

5,086.

AFFILIATE'S NAME

AFFILIATES ADDRESS

SCOTTISH RITE CONFERENCE OF VIRGINIA

C/O FRANK PERDUE, 201 OLD DOMINION  
RD  
YORKTOWN, VA 23692

PURPOSE OF PAYMENT

AMOUNT

ANNUAL ASSESSMENT

1,057.

AFFILIATE'S NAME

AFFILIATES ADDRESS

GEORGE WASHINGTON MASONIC NATIONAL  
MEMORIAL ASSN

101 CALLAHAN DRIVE  
ALEXANDRIA, VA 22301

PURPOSE OF PAYMENT

AMOUNT

ANNUAL ASSESSMENT

211.

TOTAL INCLUDED ON FORM 990-EZ, LINE 10

26,635.

FORM 990-EZ

OTHER CHANGES IN NET ASSETS OR FUND BALANCES

STATEMENT

5

DESCRIPTION

AMOUNT

NET UNREALIZED GAINS ON INVESTMENTS

142,657.

TOTAL TO FORM 990-EZ, LINE 20

142,657.



FORM 990-EZ CASH GRANTS AND ALLOCATIONS STATEMENT 6

CLASS OF ACTIVITY/GRANTEE'S NAME AND ADDRESS	GRANTEE'S RELATIONSHIP	AMOUNT
TEACHER OF THE YEAR AWARD	NONE	500.
TEACHER OF THE YEAR AWARD	NONE	500.
TEACHER OF THE YEAR AWARD	NONE	500.
TOTAL INCLUDED ON FORM 990-EZ, LINE 10		1,500.

FORM 990-EZ	INCOME AND COST OF GOODS SOLD INCLUDED ON PART I, LINE 7A	STATEMENT 7
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INCOME

1. GROSS RECEIPTS . . . . .	2,914	
2. RETURNS AND ALLOWANCES . . . . .		
3. LINE 1 LESS LINE 2 . . . . .		2,914
4. COST OF GOODS SOLD (LINE 13) . . . . .	2,821	
5. GROSS PROFIT (LINE 3 LESS LINE 4) . . . . .		93

COST OF GOODS SOLD

6. INVENTORY AT BEGINNING OF YEAR . . . . .	1,000	
7. MERCHANDISE PURCHASED . . . . .	2,821	
8. COST OF LABOR . . . . .		
9. MATERIALS AND SUPPLIES . . . . .		
10. OTHER COSTS . . . . .		
11. ADD LINES 6 THROUGH 10 . . . . .		3,821
12. INVENTORY AT END OF YEAR . . . . .	1,000	
13. COST OF GOODS SOLD (LINE 11 LESS LINE 12). .		2,821

FORM 990-EZ

INFORMATION REGARDING TRANSFERS  
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 8

- 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 9

SCOTTISH RITE FREEMASONRY IS DEVOTED TO THE PROMOTION OF THE WELFARE AND  
HAPPINESS OF MANKIND, IMPROVEMENT TO THE COMMUNITY BY SERVICE TO OTHERS AND  
SERVICE TO YOU (SELF-IMPROVEMENT).

990-EZ PG 2

STATEMENT 10

SCOTTISH RITE FREEMASONRY IS DEVOTED TO THE PROMOTION OF THE WELFARE AND  
HAPPINESS OF MANKIND, IMPROVEMENT TO THE COMMUNITY BY SERVICE TO OTHERS AND  
SERVICE TO YOU (SELF-IMPROVEMENT).

Form **8868**

(Rev. April 2009)

Department of the Treasury  
Internal Revenue Service**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868****Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns***Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*

Type or print  File by the due date for filing your return. See instructions	Name of Exempt Organization <b>ANCIENT AND ACCEPTED SCOTTISH RITE VALLEY OF NORFOLK</b>	Employer identification number <b>54-0373255</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>P.O. BOX 9407</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>NORFOLK, VA 23505-0407</b>	

**Check type of return to be filed** (file a separate application for each return):

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input checked="" type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-PF            | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**THE ORGANIZATION**

- The books are in the care of ►
- 7001 GRANBY STREET - NORFOLK, VA 23505**

Telephone No. ► **(757) 489-1076**

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 will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until
- AUGUST 15, 2010**
- , to file the exempt organization return for the organization named above. The extension

is for the organization's return for:

► ☒ calendar year **2009** or► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this tax year is for less than 12 months, check reason:
- ☐
- Initial return
- ☐
- Final return
- ☐
- Change in accounting period

<b>3a</b> 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.	<b>3a</b>	\$
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$
<b>c Balance Due.</b> Subtract line 3b from line 3a. 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.	<b>3c</b>	\$ <b>N/A</b>

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)