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IRS

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 certain other 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 July 1, 2009, and ending June 30, 2010

- 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

ROTARY CLUB of ARLINGTON
Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
c/o 62 BOARDMAN RD (Post)
City or town, state or country, and ZIP + 4
Poughkeepsie, NY 12603-4228

D Employer identification number

14-6030576

E Telephone number

(845) 454-2297

F Group Exemption Number

0573

• 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: ▶

J Tax-exempt status (check only one) — ☒ 501(c) (4) (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 ▶ \$

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

Revenue		Expenses		Net Assets or Fund Balances	
1	Contributions, gifts, grants, and similar amounts received	1	Grants and similar amounts paid (attach schedule)	18	Excess or (deficit) for the year (Subtract line 17 from line 9)
2	Program service revenue including government fees and contracts	2	Benefits paid to or for members	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)
3	Membership dues and assessments	3	Salaries, other compensation, and employee benefits	20	Other changes in net assets or fund balances (attach explanation)
4	Investment income	4	Professional fees and other payments to independent contractors	21	Net assets or fund balances at end of year. Combine lines 18 through 20
5a	Gross amount from sale of assets other than inventory	5a	Occupancy, rent, utilities, and maintenance		
5b	Less: cost or other basis and sales expenses	5b	Printing, publications, postage, and shipping		
5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	Other expenses (describe ▶ <u>Lunches, ETC, Dues</u>)		
6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>	6	Total expenses. Add lines 10 through 16		
6a	Gross revenue (not including \$ of contributions reported on line 1)	6a	17	24,034	
6b	Less: direct expenses other than fundraising expenses	6b	18	34,211	
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	19	24,318	
7a	Gross sales of inventory, less returns and allowances	7a	20	-0-	
7b	Less: cost of goods sold	7b	21	58,529	
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c			
8	Other revenue (describe ▶ <u>Lunches, Dues, MISC (Attached)</u>)	8			
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9			
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			
14	Occupancy, rent, utilities, and maintenance	14			
15	Printing, publications, postage, and shipping	15			
16	Other expenses (describe ▶ <u>Lunches, ETC, Dues</u>)	16			
17	Total expenses. Add lines 10 through 16	17			
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18			
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			
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			

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	24,318	58,529
23 Land and buildings	N/A	N/A
24 Other assets (describe ▶)	N/A	N/A
25 Total assets	24,318	58,529
26 Total liabilities (describe ▶)	N/A	N/A
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	24,318	58,529

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

Cat. No 106421

Form 990-EZ (2009)

SCANNED SEP 30 2010

Part V Other Information (Note the statement requirements in the instructions for Part 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		<input checked="" type="checkbox"/>
34 Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes		<input checked="" type="checkbox"/>
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 why the organization did not report the income on Form 990-T.		
a 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?		<input checked="" type="checkbox"/>
b If "Yes," has it filed a tax return on Form 990-T for this year?		<input checked="" type="checkbox"/>
36 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		<input checked="" type="checkbox"/>
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a <u>None</u>		
b Did the organization file Form 1120-POL for this year?		<input checked="" type="checkbox"/>
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 outstanding at the end of the period covered by this return?		<input checked="" type="checkbox"/>
b If "Yes," complete Schedule L, Part II and enter the total amount involved		
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9		<u>N/A</u>
b Gross receipts, included on line 9, for public use of club facilities		<u>N/A</u>
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ <u>N/A</u> , section 4912 ▶ <u>N/A</u> ; section 4955 ▶ <u>N/A</u>		
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		<input checked="" type="checkbox"/>
c 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		<u>N/A</u>
d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization		<u>0 N/A</u>
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.		<input checked="" type="checkbox"/>
41 List the states with which a copy of this return is filed. ▶		
42a The organization's books are in care of ▶ <u>RITA A. BRANNEN</u> Telephone no. ▶ <u>(845) 831-1172</u> Located at ▶ <u>4 Greenwood Drive, Beacon, NY</u> <u>12508</u>		
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)?	Yes	No
If "Yes," enter the name of the foreign country: ▶		<input checked="" type="checkbox"/>
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.?		<input checked="" type="checkbox"/>
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 <input type="checkbox"/>		
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ		<input checked="" type="checkbox"/>
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		<input checked="" type="checkbox"/>

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 ☒
- 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II. 47 ☐
- 48 Is the organization 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 a section 527 organization? 49b ☐
- 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."

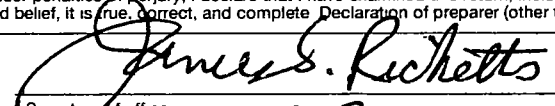
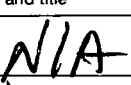
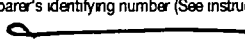
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
N/A				

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
N/A		

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		Aug 23, 2010 Date	
Paid Preparer's Use Only	JAMES S. RICKETTS Type or print name and title		Secretary, 2009/2010 year	
	Preparer's signature  N/A	Date	Check if self-employed <input type="checkbox"/>	Preparer's identifying number (See instructions) 
	Firm's name (or yours if self-employed), address, and ZIP + 4		EIN	Phone no

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

30-Jun-10

Combined Operating and Charitable Group

<u>Revenue</u>	<u>Budget</u>	<u>Actual</u>	<u>Expenditures</u>	<u>Budget</u>	<u>Actual</u>
ARC Dues	\$6,500 00	\$6,058 00	BOCES Awards	\$300 00	\$250 00
Card Game	2,000 00	1,425 00	BOCES Scholarship ✓	1,000 00	2,000 00
Coin Jar Collection	250 00	319 40	Card Game Winners	1,000 00	692 00
Fall Fund Raiser	0 00	0 00	Community Svc (raffle)	3,000 00	0 00
Happy Bucks	1,500 00	1,174 00	District Conference	800 00	0 00
Installation Dinner	2,000 00	1,367 00	District Dues	2,500 00	1,957 00
Other Fund Raising	8,500 00	500 00	Disaster Relief Fund	1,000 00	181 00
Miscellaneous	700 00	32 56	Elderact	200 00	0 00
Miscellaneous Fund Raising	200 00	193 88	Golf Tournament	0 00	0 00
Misc Fund Raising-Rib Fest	0 00	319 00	Guest Lunches	1,800 00	2,063 88
Misc Fund Raising-HRH	0 00	181 00	Holiday Program	250 00	250 00
Raffle Promotion	8,325 00	10,080 00	Installation Dinner	2,200 00	1,991 80
Rotary Foundation - 50/50	750 00	542 00	Interact Clubs	800 00	815 72
Rotary Foundation -member donation	0 00	442 00	International Project	1,000 00	833 85
ROY Dinner	2,000 00	1,311 00	Insurance & Misc (Radio Rotary, GSE)	800 00	265 75
Valentine Dance	0 00	0 00	Joint Fund Raiser	5,425 00	0 00
Ulrich Scholarship	750 00	250 00	Literacy Volunteers (Spelling Bee)	275 00	275 00
Weekly Lunches	<u>22,000 00</u>	<u>20,802 00</u>	Neidhardt Scholarship	4,000 00	4,000 00
			Misc Fund Raising	300 00	0 00
			Misc Fund Raising-HRH	0 00	0 00
			Raffle Winners	5,325 00	0 00
			R I Dues	4,000 00	3,521 74
			Rotaract Club	800 00	291 71
			Rose Parade	50 00	50 00
			Rotary Foundation	1,750 00	1,642 00
			District & Rotary Training	700 00	1,806 51
			ROY Dinner	2,000 00	2,621 80
			RYLA	900 00	900 00
			Science fair	200 00	200 00
			Supplies	400 00	973 51
			Waiter Tips	400 00	400 00
			Weekly Lunches	<u>18,800 00</u>	<u>17,356 28</u>
Total Revenue	\$55,475.00	\$44,996.84	Total Expenditures	\$61,975.00	\$45,339.55
Approp Fund Balance (Fund Raising-Golf)	5,000 00				
Appropriated Fund Balance (Operating)	1,500 00				
Total Revenue & Approp Fund Bal	\$61,975.00	\$44,996.84			

Cash Position - June 30, 2010

Cash on Hand	July 1, 2009	\$23,072.35
Deposits to Date		44,996.84
Disbursements to Date		-45,339 55
Cash on Hand	June 30, 2010	\$22,729.64

For Rotary Club of Arlington & IRS Form 990EZ

Year End June 30, 2010

FIN # 14-603576

Summary Info

Income		Expenses	
Lunches	- \$20,802.00	\$17,356.28	
Dinner ROK	- \$1,311.00	\$2,621.80	
Instal	- \$1,367.00	\$1,991.80	\$21,970
Supplies/Misc	\$973.51	\$2,063.88	Must Lunches
	\$32.56		
	<u>\$1,006.07</u>	<u>\$24,034.00</u>	

Pg #1 990EZ

LN #1	Card Game	\$1,425.00
	Happy \$	1,174.00
	Misc	193.88
	Coin Jar	319.00
	Food Drive	-0-
		<u>\$3,112.00</u>

LN #6 = 25,041.00
Retire Income
LN #3 = 6,058.00
LN #8 = 24,034.00
Lunches/Dinner

Pg #2 990EZ

LN #28 Students of Month, Boco
of Duke City and Arlington
School Dist, R/CAT Students, etc.

= \$3,107.00

LN #29 College Scholarships to Top Seniors
at Arlington High School (4 yrs.) & Boco
Trade School, Rotary Foundation and
Intl Aid Relief / Water Projects, etc.
LN #30 Interact & Rotaract Clubs for Students,
Community Soc., Science Fair of Duke City
Literacy Volunteers

= \$6,836.00

= \$1,307.00