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IRS

990-EZ

Form

Department of the Treasury  
Internal Revenue ServiceShort Form  
Return of Organization Exempt From Income TaxUnder 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 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

July 1, 2009, and ending

June 20, 2010

## A For the 2009 calendar year, or tax year beginning

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  
1062 BOARDMAN Rd (Post  
Box 4228, 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  527K 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.)

1	Contributions, gifts, grants, and similar amounts received . . . . .	1	3,112.00
2	Program service revenue including government fees and contracts . . . . .	2	
3	Membership dues and assessments . . . . .	3	6,058.00
4	Investment income . . . . .	4	0.00
5a	Gross amount from sale of assets other than inventory . . . . .	5a	N/A
b	Less: cost or other basis and sales expenses . . . . .	5b	N/A
c	Less: (a) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .	5c	N/A
6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here ► <input type="checkbox"/> of contributions . . . . .	6a	25,041
7a	Gross revenue (not including \$ . . . . .) (See Attached)	6b	0.00
b	Less: direct expenses other than fundraising expenses . . . . .	6c	25,041.00
c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a) . . . . .	7a	N/A
7a	Gross sales of inventory less returns and allowances . . . . .	7b	N/A
b	Less: cost of goods sold . . . . .	7c	N/A
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) . . . . .	8	24,034.00
8	Other revenue (describe) ► Lunches, Dances & MISC (Attached)	9	58,529.00
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 . . . . .		
10	Grants and similar amounts paid (attach schedule) . . . . .	10	N/A
11	Benefits paid to or for members . . . . .	11	N/A
12	Salaries, other compensation, and employee benefits . . . . .	12	N/A
13	Professional fees and other payments to independent contractors . . . . .	13	N/A
14	Occupancy, rent, utilities, and maintenance . . . . .	14	N/A
15	Printing, publications, postage, and shipping . . . . .	15	
16	Other expenses (describe) ► Lunches, ETC, Dances	16	24,034.00
17	<b>Total expenses.</b> Add lines 10 through 16 . . . . .	17	24,034.00
18	Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .	18	34,217
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	24,318
20	Other changes in net assets or fund balances (attach explanation) . . . . .	20	0.00
21	Net assets or fund balances at end of year. Combine lines 18 through 20 . . . . .	21	58,529

## 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 . . . . .	22	58,529
23	Land and buildings . . . . .	23	N/A
24	Other assets (describe) ►	24	N/A
25	<b>Total assets.</b> . . . . .	25	58,529
26	Total liabilities (describe) ►	26	N/A
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21) . . . . .	27	58,529

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

Cat. No. 10642I

Form 990-EZ (2009)

**Part III Statement of Program Service Accomplishments** (See the instructions for Part III.)

**What is the organization's primary exempt purpose?**

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, and other relevant information for each program title.

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

28	Students of monthly BOCES of Dutchess County & Arlington School Dist., RYLA Students, etc.		
	(Grants \$ ) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	28a	\$ 3,107.00
29	College Scholarships to Top Seniors (Arlington High School (4 yrs) & BOCES Trade Schools) & Playing Foundation		
	(Grants \$ ) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	29a	\$ 6,836.00
30	Interact/Rotaract/Rotary Club for Students, Community Service, Serial Fair of Dutchess County, Kids Emp and Literacy Volunteers		
	(Grants \$ ) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	30a	\$ 1,307.00
31	Other program services (attach schedule)		
	(Grants \$ ) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	31a	— 0 —
32	Total program service expenses (add lines 28a through 31a)		
		32	\$ 11,250.00

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

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
F. Nicole Peluso 2480 Dixie, Hyde Park NY	President / 110/	-0-	-0-	-0-
Susan A. Doyle 109 Osborne Hill Rd, EF,	Past President /	-0-	-0-	-0-
Patti A. Bragone 4 Greenwood Ln, Beacon NY	Treasurer	-0-	-0-	-0-
James J. Brown 8 Washington Blvd, Poughkeepsie	Secty	-0-	-0-	-0-
James S. Rockwell 62 Boardman Rd, Poughkeepsie	Past Secty	-0-	-0-	-0-
Eduard T. Soskin, Jr. 122 Assembly St, Poughkeepsie	Sergeant-at-Arms	-0-	-0-	-0-
James S. Rockwell 62 Boardman Rd, Poughkeepsie	Asst. Treasurer	-0-	-0-	-0-
Neal L. Marsh 15 Heather Court, Fishkill	Club Svc	-0-	-0-	-0-
M. A. Louise Van Winkle 61 High Acres Drive, Poughkeepsie	Voc. Svc	-0-	-0-	-0-
Papumond R. Ward 137 Morris Ave, Apt Q-11, Poughkeepsie	Int'l Soc	-0-	-0-	-0-
Felicia K. Kisko 2 Central Ave, Newburgh NY	Commun. Svc	-0-	-0-	-0-

**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 . . . . .	33	X
34 Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes . . . . .	34	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 why the organization did not report the income on Form 990-T. . . . .	35a	X
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? . . . . .	35b	X
b If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	36	X
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 . . . . .	37a	X
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ► 37a	37b	X
b Did the organization file <b>Form 1120-POL</b> for this year? . . . . .	38a	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 outstanding at the end of the period covered by this return? . . . . .	38b	X
b If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . .	39a	N/A
39 Section 501(c)(7) organizations Enter:	39b	N/A
a Initiation fees and capital contributions included on line 9 . . . . .	40a	N/A
b Gross receipts, included on line 9, for public use of club facilities . . . . .	40b	X
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	40c	N/A
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 . . . . .	40d	N/A
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 . . . . .	40e	X
d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization . . . . .	41	N/A
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. . . . .	42a	N/A
41 List the states with which a copy of this return is filed. ►	42b	N/A
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 12508</u> + 4 ► <u>12508</u>	42c	X
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)? . . . . .	43	□
If "Yes," enter the name of the foreign country ► <u> </u> See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts</b> . . . . .	44	X
c At any time during the calendar year, did the organization maintain an office outside of the U.S.? . . . . .	45	X
If "Yes," enter the name of the foreign country: ► <u> </u>	43	43
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> —Check here and enter the amount of tax-exempt interest received or accrued during the tax year . . . . .	44	X
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ . . . . .	45	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 . . . . .	43	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  46

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	1	

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>James S. Ricketts</i>	Date <i>Aug 23, 2010</i>	Preparer's identifying number (See instructions) <i>2</i>
Type or print name and title <i>James S. Ricketts, Secretary, 2009/2010 year</i>			

Paid Preparer's Use Only	Preparer's signature <i>N/A</i>	Date	Check if self-employed <input type="checkbox"/>	Preparer's identifying number (See instructions) <i>2</i>
	Firm's name (or yours if self-employed), address, and ZIP + 4 <i>→</i>		EIN <i>→</i>	
			Phone no <i>→</i>	

May the IRS discuss this return with the preparer shown above? See instructions . . . . . ►  Yes  No

Year End Report

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>
<b>Total Revenue</b>	<b>\$55,475.00</b>	<b>\$44,996.84</b>	<b>Total Expenditures</b>	<b>\$61,975.00</b>	<b>\$45,339.55</b>
Approp Fund Balance (Fund Raising-Golf)	5,000.00				
Appropriated Fund Balance (Operating)	1,500.00				
<b>Total Revenue &amp; Approp Fund Bal</b>	<b>\$61,975.00</b>	<b>\$44,996.84</b>			

## 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

	<u>Income</u>	<u>Expenses</u>
Lunches	\$ 20,802.00	\$ 17,356.28
Dinner ROT- F	\$ 1,311.00	\$ 2,621.80
Instal	\$ 1,367.00	\$ 1,991.80
		\$ 21,970
<u>Supplies/Misc</u>	<u>\$ 973.51</u>	<u>\$ 2,063.88</u>
	<u>\$ 32.56</u>	<u>Guest Lunches</u>
	<u>\$ 1,006.01</u>	<u>\$ 24,034.00</u>

Pg#1 990EZ

LN#1 Card Game \$ 1,426.00  
 Happy \$ 174.00  
 Misc 193.88  
 Corn Tax 319.00  
 Food Drive -  
\$ 3,112.00

LN#2 = \$ 25,041.00  
 Rotaract Income

LN#3 = \$ 6,058.00

LN#8 = \$ 4,034 -  
 Landes/  
 Penion

(Pg #2) 990EZ

LN#28 Students of Month, Boxes  
 of Date City and Arlington  
 School Dist, RYCA Students, etc.

= \$ 3,107 -

LN#29 College Scholarships to Top Seniors  
 at Arlington High School (4 yrs.) & Boxes  
 Trade School, Rotary Foundation and  
 Intel Aid Relief / Water Project, etc. = \$ 6,836.00  
 LN#30 Interact & Rotaract Clubs for Students,  
 Community Soc, Science Fair of Date City  
 Literacy Volun. Fees = \$ 1,307 -