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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 7/01, 2009, and ending 6/30, 2010

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

Please use IRS label or print or type. See Specific Instructions.

**C**  
ROTARY INTERNATIONAL-JEFFERSON CITY  
520 DIX ROAD  
JEFFERSON CITY, MO 65109**D** Employer identification number

23-7356414

**E** Telephone number

573-635-0227

**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: ▶ WWW.JEFFCITYROTARY.ORG**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 ▶ \$ 73,069.**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	1,020.
2	Program service revenue including government fees and contracts	2	804.
3	Membership dues and assessments	3	57,953.
4	Investment income	4	32.
5a	Gross amount from sale of assets other than inventory	5a	
5b	Less: cost or other basis and sales expenses	5b	
5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input checked="" type="checkbox"/>		
6a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a	12,369.
6b	Less: direct expenses other than fundraising expenses	6b	7,150.
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	5,219.
7a	Gross sales of inventory, less returns and allowances	7a	
7b	Less: cost of goods sold	7b	
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
8	Other revenue (describe ▶ SEE STATEMENT 1)	8	891.
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	65,919.
10	Grants and similar amounts paid (attach schedule)	10	18,613.
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	386.
14	Occupancy, rent, utilities, and maintenance	14	
15	Printing, publications, postage, and shipping	15	177.
16	Other expenses (describe ▶ SEE STATEMENT 3)	16	36,001.
17	<b>Total expenses.</b> Add lines 10 through 16	17	55,177.
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	10,742.
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	9,153.
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	19,895.

**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	10,296.
23	Land and buildings	23	19,792.
24	Other assets (describe ▶ SEE STATEMENT 4)	24	308.
25	<b>Total assets</b>	25	10,604.
26	<b>Total liabilities</b> (describe ▶ SEE STATEMENT 5)	26	19,895.
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	27	1,451.
			0.
			19,895.

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

Form 990-EZ (2009)



**Part V Other Information** (Note the statement requirements in the instrs 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.		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 gross 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		N/A
<b>b</b> Gross receipts, included on line 9, for public use of club facilities		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		X
<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		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 **EVERS AND COMPANY, CPA'S** Telephone no **573-635-0227**  
 Located at **520 DIX ROAD, JEFFERSON CITY, MO** ZIP + 4 **65109**

**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)? **42b** X  
 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.? **42c** X  
 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 ☐ 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>		

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

<b>47</b>		
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**48** Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E

<b>48</b>		
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**49a** Did the organization make any transfers to an exempt non-charitable related organization?

<b>49a</b>		
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**b** If 'Yes,' was the related organization a section 527 organization?

<b>49b</b>		
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**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

**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

**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.							
	<p>▶ <u>Mark Naeger</u> Signature of officer</p> <p>▶ <u>Mark Naeger</u> <u>Treas.</u> Type or print name and title</p>	<p><u>2-15-11</u> Date</p>						
<b>Paid Preparer's Use Only</b>	Preparer's signature	▶ <u>Elmer L. Evers</u> ELMER L. EVERS, CPA	Date	▶ <u>2-15-11</u>	Check if self employed	▶ <input type="checkbox"/>	Preparer's Identifying Number (See instructions)	▶ N/A
	Firm's name (or yours if self employed), address, and ZIP + 4	▶ <u>EVERS &amp; COMPANY, CPA'S, LLC</u> <u>520 DIX ROAD</u> <u>JEFFERSON CITY, MO 65109</u>			EIN	▶ <u>N/A</u>		
				Phone no	▶ <u>(573) 635-0227</u>			

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

▶ ☒ **Yes** ☐ **No**

2009

## FEDERAL STATEMENTS

PAGE 1

ROTARY INTERNATIONAL-JEFFERSON CITY

23-7356414

**STATEMENT 1**  
**FORM 990-EZ, PART I, LINE 8**  
**OTHER REVENUE**

OTHER INCOME

	\$	891.
TOTAL	\$	<u>891.</u>

**STATEMENT 2**  
**FORM 990-EZ, PART I, LINE 10**  
**GRANTS AND SIMILAR AMOUNTS PAID**

CLASS OF ACTIVITY:	DONATION	
DONEE'S NAME:	RECIPIENTS UNDER \$5,000	
	JEFFERSON CITY, MO,	
RELATIONSHIP OF DONEE:	NONE	
CASH AMOUNT GIVEN:		\$ 7,500.

PAYMENTS TO AFFILIATES

NAME:	ROTARY INTERNATIONAL	
ADDRESS:	P.O. BOX 75297	
	CHICAGO, IL 60675	
PURPOSE OF PAYMENT:	DUES/INSURANCE	
AMOUNT:		\$ 9,158.

NAME:	ROTARY DISTRICT 6080	
ADDRESS:	1423-A SOUTH LIMIT	
	SEDALIA, MO 65301	
PURPOSE OF PAYMENT:	DISTRICT DUES	
AMOUNT:		\$ 1,955.

PAYMENTS TO AFFILIATES		\$ 11,113.
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**STATEMENT 3**  
**FORM 990-EZ, PART I, LINE 16**  
**OTHER EXPENSES**

CLUB ENTERTAINMENT		\$ 695.
CONFERENCES, CONVENTIONS, AND MEETINGS		31,717.
DEPRECIATION		205.
EXCHANGE STUDENT		528.
GSE TEAM EXPENSE		100.
MEMBER SOCIAL EVENTS		383.
MISCELLANEOUS EXPENSES		851.
OFFICE EXPENSES		101.
OTHER CLUB ADMINISTRATION		601.
SUPPLIES		820.
TOTAL	\$	<u>36,001.</u>

2009

## FEDERAL STATEMENTS

PAGE 2

ROTARY INTERNATIONAL-JEFFERSON CITY

23-7356414

STATEMENT 4  
FORM 990-EZ, PART II, LINE 24  
OTHER ASSETS

	BEGINNING	ENDING
FURNITURE AND FIXTURES	\$ 308.	\$ 103.
TOTAL	\$ 308.	\$ 103.

STATEMENT 5  
FORM 990-EZ, PART II, LINE 26  
TOTAL LIABILITIES

	BEGINNING	ENDING
BANK OVERDRAFT	\$ 1,451.	\$ 0.
TOTAL	\$ 1,451.	\$ 0.

STATEMENT 6  
FORM 990-EZ, PART IV  
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
LINDA NICHOLS	PRESIDENT ELECT 2.00	\$ 0.	\$ 0.	\$ 0.
WARREN PROST	PAST PRESIDENT 1.00	0.	0.	0.
BRIAN JOHNSON	BOARD MEMBER 1.00	0.	0.	0.
JAKE SCHMITZ	TREASURER 5.00	0.	0.	0.
JOHN WOOD	SECRETARY 5.00	0.	0.	0.
BERNIE FECHTEL	BOARD MEMBER 1.00	0.	0.	0.
ALICIA TURNER	BOARD MEMBER 3.00	0.	0.	0.

**STATEMENT 6 (CONTINUED)**  
**FORM 990-EZ, PART IV**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
WALT ROTTMAN	BOARD MEMBER 1.00	\$ 0.	\$ 0.	\$ 0.
,				
MIKE GRAY	BOARD MEMBER 6.00	0.	0.	0.
,				
JASON CALL	BOARD MEMBER 1.00	0.	0.	0.
,				
TIM HAAS	BOARD MEMBER 1.00	0.	0.	0.
,				
STEVE HOUSER	PRESIDENT 7.00	0.	0.	0.
,				
ADDRESS FOR ALL LISTED 520 DIX ROAD JEFFERSON CITY, MO 65109	0	0.	0.	0.
	TOTAL	\$ 0.	\$ 0.	\$ 0.