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Form 990-EZ

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.

2009

Open to Public
InspectionDepartment of the Treasury
Internal Revenue Service

A For the 2009 calendar year, or tax year beginning 07-01-2009

, and ending 06-30-2010

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 International - Westerville Sunrise Rotary Club	D Employer identification number 31-1426601
Number and street (or P O box, if mail is not delivered to street address) PO Box 1200	E Telephone number (614) 901-7100
City or town, state or country, and ZIP + 4 Westerville, OH 43086	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.westervillerotary.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 ► \$ 54,207

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	6,725
2 Program service revenue including government fees and contracts	2	27,421
3 Membership dues and assessments	3	19,879
4 Investment income	4	182
5a Gross amount from sale of assets other than inventory	5a	
b Less cost or other basis and sales expenses	5b	0
c 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 ►	6a	0
a Gross revenue (not including \$ of contributions reported on line 1)	6b	0
b Less direct expenses other than fundraising expenses	6c	0
c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	7a	
7a Gross sales of inventory, less returns and allowances	7b	0
b Less cost of goods sold	7c	
c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	8	
8 Other revenue (describe ►)	9	54,207
9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8		
10 Grants and similar amounts paid (attach schedule) ►	10	7,338
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	28
16 Other expenses (describe ►)	16	42,498
17 Total expenses. Add lines 10 through 16	17	49,864
18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	4,343
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	10,661
20 Other changes in net assets or fund balances (attach explanation) ►	20	-648
21 Net assets or fund balances at end of year Combine lines 18 through 20	21	14,356

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	19,769	22 17,716
23 Land and buildings		23
24 Other assets (describe ►)	4,210	24 5,940
25 Total assets	23,979	25 23,656
26 Total liabilities (describe ►)	13,318	26 9,300
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	10,661	27 14,356

Part III Statement of Program Service Accomplishments (See the instructions for Part III)			Expenses (Required for section 501 (c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others)
<p>What is the organization's primary exempt purpose?</p> <p>The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster First The development of acquaintance as an opportunity for service Second High ethical standards in business and professions, the recognition of the worthiness of all useful occupations, and the dignifying by each Rotarian's occupation as an opportunity to serve society Third The application of the ideal of service in each Rotarian's personal, business, and community life Fourth The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service</p>			
<p>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</p>			
28 Seminars and conventions - by attending seminars and conventions sponsored by Rotary International and the Club's District, the members gain invaluable leadership skills, knowledge about the world community, and how to utilize available resources to accomplish the charitable and humanitarian objectives of Rotary (i e , service) This year's expense covers three district meetings and the Rotary International convention (Grants \$ 2,771)	If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	28a	
29 Per Capita Dues paid to Rotary International and the Club's District chapter provide access and support to all of the resources provided at the international and district level As a Rotary Club, these per capita expenses are required (Grants \$)	If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	29a	7,338
30 Fellowship opportunities (weekly and periodic social gatherings)allow members to become acquainted, listen to weekly speakers who are community or charitable leaders, and enables members to support each other in pursuing charitable projects These expenses benefit the roughly 80 members of the Club (Grants \$ 37,779)	If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	30a	
31 Other program services (attach schedule) (Grants \$)	If this amount includes foreign grants, check here . . . ► <input type="checkbox"/>	31a	
32 Total program service expenses (add lines 28a through 31a) ► <input type="checkbox"/>	32	40,550

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

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	No
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes		34	No
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?		35a	No
b	If "Yes," has it filed a tax return on Form 990-T for this year?		35b	
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		36	No
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ►	37a		
b	Did the organization file Form 1120-POL for this year?		37b	No
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?		38a	No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved	38b		
39	<i>Section 501(c)(7) organizations.</i> Enter		39a	0
a	Initiation fees and capital contributions included on line 9		39b	0
b	Gross receipts, included on line 9, for public use of club facilities			
40a	<i>Section 501(c)(3) organizations.</i> Enter amount of tax imposed on the organization during the year under section 4911 ►, section 4912 ►, section 4955 ►		40b	No
b	<i>Section 501(c)(3) and 501(c)(4) organizations.</i> 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			
c	<i>Section 501(c)(3) and 501(c)(4) organizations.</i> Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ►			
d	<i>Section 501(c)(3) and 501(c)(4) organizations.</i> Enter amount of tax on line 40c reimbursed by the organization ►			
e	<i>All organizations.</i> At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T		40e	No
41	List the states with which a copy of this return is filed ► OH			
42a	The organization's books are in care of ► Rich Mannino	Telephone no ► (614) 568-7777		
	PO Box 1200			
	Located at ► Westerville, OH	ZIP + 4 ► 430861200		
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	No
	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.			
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?		42c	No
	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		
44	Did the organization maintain any donor advised funds? If "Yes", Form 990 must be completed instead of Form 990-EZ.		44	No
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.		45	No

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.

	Yes	No
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	46	
47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	47	
48 Is the organization a school 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
NONE				

50(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
NONE		

51(d) Total number of other independent contractors each receiving over \$100,000 ► _____

Please 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 Pat Knott President Type or print name and title	2011-05-15 Date	

Paid Preparer's Use Only	Preparer's signature	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 <input type="checkbox"/> Phone no. <input type="checkbox"/>

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

Additional Data

Software ID:
Software Version:
EIN: 31-1426601
Name: Rotary International - Westerville
Sunrise Rotary Club

Form 990EZ, Part IV - List of Officers, Directors, Trustees, and Key Employees

(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
Doug Fosselman PO Box 1200 Westerville, OH 430861200	Director 1 00	0		
Pat Kemmer PO Box 1200 Westerville, OH 430861200	Director 1 00	0		
Jeff Daniels PO Box 1200 Westerville, OH 430861200	Director 1 00	0		
Mark Kelly PO Box 1200 Westerville, OH 430861200	Director 1 00	0		
Joan McKinney PO Box 1200 Westerville, OH 430861200	Director 1 00	0		
Dave Wartel PO Box 1200 Westerville, OH 430861200	Director 1 00	0		
Renee Kropat PO Box 1200 Westerville, OH 430861200	Sergeant-At-Arm 2 00	0		
Larry Jenkins PO Box 1200 Westerville, OH 430861200	Past President 2 00	0		
Carl Smerdel PO Box 1200 Westerville, OH 430861200	Treasurer 2 00	0		
Julie Friend PO Box 1200 Westerville, OH 430861200	Secretary 2 00	0		
Heather Lynch PO Box 1200 Westerville, OH 430861200	Vice President 2 00	0		
Pat Knott PO Box 1200 Westerville, OH 430861200	President-Elect 5 00	0		
Walter Lundstrom PO Box 1200 Westerville, OH 430861200	President 5 00	0		

TY 2009 Grants and Similar Amounts Paid Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 09000047

Software Version: 2009v1.7

Item No.	1
Class of Activity	Dues
Donee's Name	Rotary District 6690
Donee's Address	399 Hickory Lane Westerville, OH 43081
Amount (FMV)	1,660
Purpose of Payment to Affiliate	
Relationship	Supporting Organization
Description	
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

Item No.	2
Class of Activity	Dues
Donee's Name	Rotary International
Donee's Address	14255 Collections Center Dr Chicago, IL 60693
Amount (FMV)	5,678
Purpose of Payment to Affiliate	
Relationship	Supporting Organization
Description	
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

TY 2009 Other Assets Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 09000047

Software Version: 2009v1.7

Description	Beginning of Year Amount	End of Year Amount
Prepaid Expenses and Deferred Charges	216	96
Accounts Receivable	3,994	5,844

TY 2009 Other Changes in Net Assets Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 09000047

Software Version: 2009v1.7

Description	Amount
Prior Period Adjustment	-648

TY 2009 Other Expenses Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 09000047

Software Version: 2009v1.7

Description	Amount
Weekly Meeting Expenses	585
The Lakes Holiday party	3,490
Rotary Information / Supplies	348
Relay for Life	193
Public Relations	509
Meetings & Conferences	2,771
Medallion Installation Banquet	3,118
MCL meeting meals	23,698
Installation Banquet Exp/Award	3,635
Holiday Party Misc Expenses	530
Halloween Party	576
Fellowship Expenses	1,385
Family of Rotary	221
Administrative Expenses	1,439

TY 2009 Other Liabilities Schedule

Name: Rotary International - Westerville

Sunrise Rotary Club

EIN: 31-1426601

Software ID: 09000047

Software Version: 2009v1.7

Description	Beginning of Year Amount	End of Year Amount
Advanced Dues	200	
Accounts Payable and Accrued Expenses	13,118	9,300