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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)

OMB No 1545-1150

**2009**

**Open to Public Inspection**

Department of the Treasury  
 Internal Revenue Service

▶ 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.

**A** For the 2009 calendar year, or tax year beginning **07/01/09**, and ending **06/30/10**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type. See Specific Instructions.	<b>C</b> Name of organization <b>BETA NU HOUSE ASSOCIATION OF KAPPA KAPPA GAMMA</b>	<b>D</b> Employer identification number <b>31-6034320</b>	
		Number and street (or P O box, if mail is not delivered to street address) <b>55 E 15TH AVE</b>	Room/suite _____	<b>E</b> Telephone number <b>614-442-0741</b>
		City or town, state or country, and ZIP + 4 <b>COLUMBUS OH 43201</b>	<b>F</b> Group Exemption Number _____	

• 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) ( **7** ) ◀ (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. ▶ \$ **337,390**

**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	
	2	Program service revenue including government fees and contracts	2	288,788
	3	Membership dues and assessments	3	
	4	Investment income	4	
	5a	Gross amount from sale of assets other than inventory	5a	14,572
	5b	Less cost or other basis and sales expenses	5b	14,727
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	-155
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>	6	
	6a	Gross revenue (not including \$ _____ of contributions reported on line 1)	6a	
	6b	Less direct expenses other than fundraising expenses	6b	
6c	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	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 ▶ <b>See Statement 2</b> )	8	34,030	
9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	322,663	
Expenses	10	Grants and similar amounts paid (attach schedule) <b>Stmt 3</b>	10	14,306
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	85,350
	13	Professional fees and other payments to independent contractors	13	15,142
	14	Occupancy, rent, utilities, and maintenance	14	26,429
	15	Printing, publications, postage, and shipping	15	194
	16	Other expenses (describe ▶ <b>See Statement 4</b> )	16	224,071
	17	<b>Total expenses.</b> Add lines 10 through 16	17	365,492
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-42,829
	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	889,144
	20	Other changes in net assets or fund balances (attach explanation) <b>See Statement 5</b>	20	2,006
	21	<b>Net assets or fund balances at end of year.</b> Combine lines 18 through 20	21	848,321

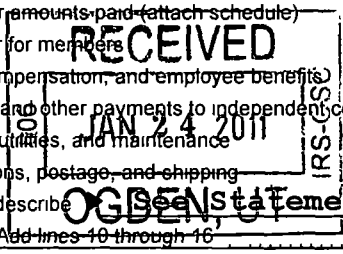
**Part II Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II)		(A) Beginning of year	(B) End of year
22	Cash, savings, and investments	153,451	129,073
23	Land and buildings		
24	Other assets (describe ▶ <b>See Statement 6</b> )	763,137	745,168
25	<b>Total assets</b>	916,588	874,241
26	<b>Total liabilities</b> (describe ▶ <b>See Statement 7</b> )	27,444	25,920
27	<b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	889,144	848,321

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

Form 990-EZ (2009)

SCANNED FEB 09 2011





**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		X
34	Were any changes made to the organizing or governing documents? If "Yes," attached a conformed copy of the changes		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		
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?	X	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	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		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instr <span style="float:right">▶ <b>37a</b></span>		
b	Did the organization file Form 1120-POL for this year?		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?		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved <span style="float:right">▶ <b>38b</b></span>		
39	Section 501(c)(7) organizations Enter		
a	Initiation fees and capital contributions included on line 9 <span style="float:right">▶ <b>39a</b></span>		
b	Gross receipts, included on line 9, for public use of club facilities <span style="float:right">▶ <b>39b</b></span>		
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 <span style="float:right">▶</span> _____, section 4912 <span style="float:right">▶</span> _____, section 4955 <span style="float:right">▶</span> _____		
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		
40b			
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 <span style="float:right">▶</span> _____		
d	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization <span style="float:right">▶</span> _____		
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		X
40e			
41	List the states with which a copy of this return is filed <span style="float:right">▶ <b>None</b></span>		
42a	The organization's books are in care of <span style="float:right">▶ <b>KEITH LEWIS</b></span> Telephone no <span style="float:right">▶ <b>614-876-6993</b></span> <b>4010 MAIN STREET</b> Located at <span style="float:right">▶ <b>HILLIARD, OH</b></span> ZIP + 4 <span style="float:right">▶ <b>43026</b></span>		
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 <span style="float:right">▶</span> _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		X
42b			
c	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 <span style="float:right">▶</span> _____		X
42c			
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 <span style="float:right">▶ <input type="checkbox"/></span> <span style="float:right">▶ <b>43</b></span>		
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ		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		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.

<b>46</b>	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>47</b>	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II		
<b>48</b>	Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		
<b>49a</b>	Did the organization make any transfers to an exempt non-charitable related organization?		
<b>49b</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."

(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

**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 ▶ \_\_\_\_\_

**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.

*Kristine Hertl* 1/17/11  
 Signature of officer Date  
**KRISTINE HERTL** **CURRENT PRESIDENT**  
 Type or print name and title

**Paid Preparer's Use Only**

Preparer's signature <i>K. H. Cochenour</i>	Date <b>01/14/11</b>	Check if self-employed <input type="checkbox"/>	Preparer's Identifying Number (See instr) <b>P00236326</b>
Firm's name (or yours if self-employed), address, and ZIP + 4 <b>Jones, Cochenour &amp; Co. 4010 Main St Hilliard, OH 43026-1105</b>	EIN <b>31-1423687</b>	Phone no <b>614-876-6993</b>	

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

## Federal Statements

Statement 1 - Form 990-EZ, Part I, Line 5c - Sale of Assets Other than Inventory -  
Securities

Description	How Received	Whom Sold	Date Acquired	Date Sold	Sale Price	Cost & Expense	Depreciation	Gain / Loss
MID FIRST	Donation		1/22/09	7/28/09	\$ 14,000	\$ 14,000	\$	
AMERICAN FUNDS	Donation		7/02/08	7/30/09	25	32		-7
COLUMBIA MARSICO	Donation		7/02/08	7/30/09	20	27		-7
DAVIS NEW YORK	Donation		7/02/08	7/30/09	25	32		-7
DIAMOND HILL LONG	Donation		7/02/08	7/30/09	20	24		-4
DREYFUS	Donation		7/02/08	7/30/09	25	33		-8
EATON VANCE	Donation		7/02/08	7/30/09	25	35		-10
FT TEMPLETON	Donation		7/02/08	7/30/09	25	23		2
FT FRANKLIN CONV	Donation		7/02/08	7/30/09	25	31		-6
FT FRANKLIN STR	Donation		7/02/08	7/30/09	50	52		-2
FT FRANKLIN STR	Donation		7/02/08	7/30/09	72	77		-5
HARTFORD CAPITAL	Donation		7/02/08	7/30/09	25	33		-8
HENDERSON GLOBAL	Donation		7/02/08	7/30/09	35	41		-6
IVY ASSET	Donation		7/02/08	7/30/09	50	68		-18
JP MORGAN	Donation		7/02/08	7/30/09	10	13		-3
OPPENHEIMER	Donation		7/02/08	7/30/09	10	12		-2
PIMCO	Donation		7/02/08	7/30/09	25	27		-2

**Federal Statements**

**Statement 1 - Form 990-EZ, Part I, Line 5c - Sale of Assets Other than Inventory -  
Securities (continued)**

How Received	Description	Whom Sold	Date Acquired	Date Sold	Sale Price	Cost & Expense	Depreciation	Gain / Loss
	THORNBURG							
Donation			7/02/08	7/30/09	\$ 20	\$ 24	\$	-4
	THORNBURG INTL							
Donation			7/02/08	7/30/09	35	44		-9
	UBS GLOBAL							
Donation			7/02/08	7/30/09	50	99		-49
Total					\$ 14,572	\$ 14,727	\$ 0	\$ -155

31-6034320

**Federal Statements**

FYE: 6/30/2010

**Statement 2 - Form 990-EZ, Part I, Line 8 - Other Revenue**

<u>Description</u>	<u>Amount</u>
OTHER INVESTMENT	\$ 31,676
INTEREST & DIVIDENDS	2,354
Total	<u>\$ 34,030</u>

# Federal Statements

## Statement 3 - Form 990-EZ, Part I, Line 10 - Payments to Affiliates

Name and Address	Purpose	Amount of Payment
BETA NU FOUNDATION 55 E 15TH AVE COLUMBUS, OH 43201	SCHOLARSHIPS	14,306
Total		<u>14,306</u>

31-6034320

**Federal Statements**

FYE: 6/30/2010

**Statement 4 - Form 990-EZ, Part I, Line 16 - Other Expenses**

<u>Description</u>	<u>Amount</u>
OTHER INVESTMENT EXP DIRECTLY CONNECTED	\$ 13,468
Expenses	
	1,217
CONVENTION	2,278
BANK SERVICE CHARGES	217
HOUSE DEPARTMENT EXPENSES	91,101
TELEPHONE	2,495
ROUTINE UPKEEP/REPAIRS	41,192
TAXES	30,545
UTILITIES	41,558
Total	<u>\$ 224,071</u>

**Statement 5 - Form 990-EZ, Part I, Line 20 - Other Changes in Net Assets or Fund Balances**

<u>Description</u>	<u>Amount</u>
UNREALIZED INVESTMENT INCOME	\$ 7,247
FEDERAL INCOME TAX	-5,241
Total	<u>\$ 2,006</u>

**Statement 6 - Form 990-EZ, Part II, Line 24 - Other Assets**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>
Accounts Receivable	\$ 21	\$ 91
HOUSE, BUILDING & EQUIPMENT	975,131	983,521
Less Accumulated Depreciation	212,015	238,444
	<u>763,137</u>	<u>745,168</u>

**Statement 7 - Form 990-EZ, Part II, Line 26 - Total Liabilities**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>
Accounts Payable and Accrued Expenses	\$ 27,444	\$ 25,920
	<u>27,444</u>	<u>25,920</u>

**Federal Statements**

**Statement 8 - Form 990-EZ, Part III - Organization's Primary Exempt Purpose**

Description

TO PROVIDE HOUSING TO THE ORGANIZATION MEMBERS AND ENGAGE IN PERIODIC SOCIAL ACTIVITIES

31-6034320

## Federal Asset Report

FYE: 6/30/2010

## Form 990, Page 1

Asset	Description	Date In Service	Cost	Bus %	Sec 179Bonus	Basis for Depr	PerConv Meth	Prior	Current
<b>7-year GDS Property:</b>									
12	THE WATERWORKS-NEW AIR CONITI	3/27/10	3,122			3,122	7 HY S/L	0	446
			<u>3,122</u>			<u>3,122</u>		<u>0</u>	<u>446</u>
<b>15-year GDS Property:</b>									
10	MDWAY STRUCTURAL PIPE & SUPPL'	10/30/09	2,883		X	1,441	15 HY S/L	0	1,490
11	FEAZEL ROOFING CO	12/15/09	2,385		X	1,192	15 HY S/L	0	1,232
			<u>5,268</u>			<u>2,633</u>		<u>0</u>	<u>2,722</u>
<b>Other Depreciation:</b>									
1	HOUSE	1/01/67	835,995			835,995	40 MO S/L	92,827	20,900
2	EQUIPMENT	1/01/02	6,886			6,886	7 MO S/L	6,886	0
3	FURNITURE & FIXTURES	1/01/02	23,765			23,765	7 MO S/L	23,765	0
4	IMPROVEMENT	1/01/02	85,707			85,707	15 MO S/L	85,707	0
5	STEP REPLACEMENT-CONCRETE	7/27/07	6,550			6,550	15 MO S/L	837	437
6	SALAD BAR	8/14/07	2,412			2,412	7 MO S/L	661	344
7	NEW BOILER	9/06/07	1,343			1,343	7 MO S/L	352	192
8	ASPHALT REPAIR\COATING	9/06/07	5,170			5,170	15 MO S/L	632	345
9	BOILER	2/19/09	7,303			7,303	7 MO S/L	348	1,043
	<b>Total Other Depreciation</b>		<u>975,131</u>			<u>975,131</u>		<u>212,015</u>	<u>23,261</u>
	<b>Total ACRS and Other Depreciation</b>		<u>975,131</u>			<u>975,131</u>		<u>212,015</u>	<u>23,261</u>
	<b>Grand Totals</b>		983,521			980,886		212,015	26,429
	<b>Less: Dispositions and Transfers</b>		0			0		0	0
	<b>Less: Start-up/Org Expense</b>		0			0		0	0
	<b>Net Grand Totals</b>		<u>983,521</u>			<u>980,886</u>		<u>212,015</u>	<u>26,429</u>