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OMB No 1545-1150

2009

990-EZ

Department of the Treasury

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

Open to Public Inspection

▶ The organization may have to use a copy of this return to satisfy state reporting requirements. Internal Revenue Service For the 2009 calendar year, or tax year beginning 07-01-2009 , and ending 06-30-2010 Check if applicable C Name of organization D Employer identification number Please ROTARY CLUB OF COLUMBUS INDIANA Address change use IRS 35-6077116 Name change label or Number and street (or P O box, if mail is not delivered to street address) Room/suite E Telephone number print or PO BOX 1091 Initial return type. (812) 376-9245 Terminated See Specific City or town, state or country, and ZIP + 4 F Group Exemption Amended return Instruc-COLUMBUS, IN 472021091 Application pending tions. G Accounting method Cash Accrual Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts Other (specify) 🟲 must attach a completed Schedule A (Form 990 or 990-EZ). Check F I if the organization I Website:▶ WWW COLUMBUSROTARY NET is **not** required to attach **J Tax-Exempt status** (check only one)— 501(c) (4) ◄(Insert no ) 4947(a)(1) or 527 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 **►** \$ Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I ) Contributions, gifts, grants, and similar amounts received 19,015 Program service revenue including government fees and contracts 2 Membership dues and assessments 3 20.736 3 4 511 Gross amount from sale of assets other than inventory Revenue Less cost or other basis and sales expenses 5b Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) 5c Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here 🕨 🔽 Gross revenue (not including \$ of contributions Less direct expenses other than fundraising expenses Net income or (loss) from special events and activities (Subtract line 6b from line 6a) 6c Gross sales of inventory, less returns and allowances Less cost of goods sold . . . . . . . . . Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) 22.292 Other revenue (describe 8 8 **Total revenue.** Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 62,554 9 9 Grants and sımılar amounts paıd (attach schedule) 🕏 21,275 10 10 Benefits paid to or for members . . 11 11 12 Salaries, other compensation, and employee benefits 12 Professional fees and other payments to independent contractors 585 13 13 Expenses Occupancy, rent, utilities, and maintenance 14 14 Printing, publications, postage, and shipping 15 889 15 35,491 16 Other expenses (describe 16 Total expenses. Add lines 10 through 16 58,240 17 17 Excess or (deficit) for the year (Subtract line 17 from line 9) 4.314 18 18 NetAssets 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) 38,946 19 Other changes in net assets or fund balances (attach explanation) 20 20 Net assets or fund balances at end of year Combine lines 18 through 20 43,260 21 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 22 Cash, savings, and investments 22 43,260 Land and buildings 23 Other assets (describe 24 25 38,946 43,260

25 Total assets

Total liabilities (describe

0 26

27

38,946

0

43,260

| What is the organization's primary exempt purpose?  ASSIST LOCAL CHARITIES AND EDUCATION THROUGH HUMANITARIAN SERVICE AND ENCOURAGE HIGH ETHICAL STANDARDS IN ALL VOCATIONS HELP BUILD GOODWILL AND PEACE THROUGHOUT THE WORLD  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 ASSIST LOCAL CHARITIES AND EDU<br>HIGH ETHICAL STANDARDS IN ALL VOC<br>THROUGHOUT THE WORLD<br>(Grants \$ 21,275) If this  |  | ND MAINTAIN GOOD                         | WILL AND PEACE  |             |   |  |
| 29  | s amount includes loreign ç                              | grants, check here .                     | · · •   | 28a         | 53,674  |  |
| (Grants \$ ) If this  | s amount includes foreign (                              | grants, check here .                     | ▶┌  | 29a         |   |  |
|   | s amount includes foreign ç                              | grants, check here .                     | ▶┌  | 30a         |   |  |
|   | s amount includes foreign o                              | grants, check here                       |   | 31a         |   |  |
| 32 Total program service expenses (add line   |  |  |   | 32          | 53,674  |  |
| Part IV List of Officers, Directors, Trus  (a) Name and address   | (b) Title and average hours per week devoted to position | (c) Compensation (If not paid, enter -0) | (d) Contributions employee benefit pl deferred compensa | to<br>ans & | (e) Expense   |  |
|   |  | ,  | ·   |             |   |  |
|   |  |  |   |             |   |  |
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|   |  |  |   |             |   |  |
|   |  |  |   |             |   |  |

| Pa  | rt 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             |         | Νο         |
| 34  | Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes   | 34             |         | Νο         |
| 35  | If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but <b>not</b> reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T   |                |         |            |
| а   | 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            |         | Νo         |
| b   | If "Yes," has it filed a tax return on <b>Form 990-T</b> 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             |         | Νο         |
| 37a | Enter amount of political expenditures, direct or indirect, as described in the instructions 🕨 🔭 37a 0   |                |         |            |
| b   | Did the organization file Form 1120-POL for this year?   | 37b            |         |            |
| 38a | Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee <b>or</b> were   |                |         |            |
|     | any such loans made in a prior year and still outstanding at the end of the period covered by this return?   | 38a            |         | Νo         |
| Ь   | If "Yes," complete Schedule L, Part II and enter the total amount involved . 38b   |                |         |            |
| 39  | Section 501(c)(7) organizations. Enter   |                |         |            |
| а   | Initiation fees and capital contributions included on line 9   |                |         |            |
| b   | Gross receipts, included on line 9, for public use of club facilities  |                |         |            |
| 40a | Section $501(c)(3)$ organizations. Enter amount of tax imposed on the organization during the year under   |                |         |            |
|     | section 4911 ▶, section 4912 ▶, section 4955 ▶   |                |         |            |
| 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            |         | Νo         |
| 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   |                |         |            |
| d   | Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization   |                |         |            |
| 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   | 40e            |         | Νo         |
| 41  | List the states with which a copy of this return is filed IN   |                |         |            |
| 42a |  | (81            | 2) 376- | 9245       |
|     | P O BOX 1091  Located at ▶ columbus, IN  ZIP + 4   | <b>&gt;</b> 47 | 202     |            |
| h   | 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  |                | Yes     | No         |
|     | account)?  | 42b            |         | Νo         |
|     | 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.  |                |         |            |
| С   | At any time during the calendar year, did the organization maintain an office outside of the U S ?   | 42c            |         | Νo         |
|     | If "Yes," enter the name of the foreign country  |                |         |            |
| 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  |                |         | <b>▶</b> Г |
| 11  | Did the organization maintain any denor adviced funds? If "Vec" Form 900 must be completed instead of  |                | Yes     | No         |
| 44  | Did the organization maintain any donor advised funds? If "Yes", Form 990 must be completed instead of   |                |         | N -        |
| 45  | 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.   | AE             |         | NI -       |
|     | · · · · · · · · · · · · · · · · · · ·  | 45             |         | No         |

| Form  | 990-E           | Z (2009)   |  |                           |                        |  |          |                            | Page <b>4</b> |
|---|-----------------|--|--|---------------------------|------------------------|--|----------|----------------------------|---------------|
| Par   | t VI            | Section 501(c)(3) organ<br>All section 501(c)(3) organ<br>46-49b and complete the  | nizations and sectio                                     | n 4947(a)(1) nonex        | -                      |  |          | -                          | stions        |
| 46  | Did the         | e organization engage in direct  | or indirect political cai                                | mpaign activities on be   | ehalf of or in opp     | osition to                                       |          | Yes                        | No            |
| candidates for public office? If "Yes," complete Schedule C, Part I |                 |  |  |                           |                        | 46   |          |                            |               |
| 47  | Did the         | e organization engage in lobbyii   | ng activities? If "Yes,"                                 | complete Schedule C,      | , Part II              |  | 47       |                            |               |
| 48  | Is the          | organization a school describe   | d ın section 170(b)(1)                                   | (A)(II)? If "Yes," comple | ete Schedule E         |  | 48       |                            |               |
| 49a   | Did the         | e organization make any transfe  | ers to an exempt non-c                                   | :harıtable related orgar  | nızatıon?              |  | 49a      |                            |               |
| ь   | If"Yes          | s," was the related organization   | a section 527 organiz                                    | ation?                    |                        |  | 49b      |                            |               |
| 50  | •               | ete this table for the organizati<br>yees) who each received more t  |  |                           |                        |  |          |                            |               |
| (a)   |                 | and address of each employee<br>I more than \$100,000  | (b) Title and average hours per week devoted to position | (c) Compensati            | ion employee           | tributions to<br>benefit plans &<br>compensation | a        | e) Expe<br>count<br>rallow | and           |
|   |                 |  |  |                           |                        |  |          |                            |               |
|   | ) Tota          | I number of other employees pa   | ud over \$1.00.000                                       |                           |                        |  |          |                            |               |
| 51  | Compl<br>of com | ete this table for the organization<br>pensation from the organization<br>me and address of each indepe  | on's five highest comp<br>n Ifthere is none, ente        | er "None "                |                        | each received n                                  |          | an \$10<br>Compen          |               |
|   |                 |  |  |                           |                        |  |          |                            |               |
| 51(d  |                 | I number of other independent o  |  | . ,                       |                        |  |          |                            |               |
| Plea<br>Sign<br>Here  | se              | Under penalties of perjury, I declare to and belief, it is true, correct, and com  ******  Signature of officer  TASHA MANN TREASURER Type or print name and title |  |                           |                        | on of which prepare                              |          |                            |               |
| Paid  |                 | Preparer's<br>signature Sara C Jacobi CPA  |  | Date<br>2011-02-12        | Check if self-empolyed | Preparer's identif<br>(See instructions)         |          | nber                       |               |
| Prepa<br>Use C  | Inly            | Firm's name (or yours if self-employed), address, and ZIP + 4  | gton St  |                           |                        | EIN ▶ Phone no ▶ (8                              | 12) 376- | 9245                       |               |
| ———<br>Mav t  | he IRS          | Columbus, discuss this return with the pre   |  | See instructions          |                        | ▶  |          |                            | No No         |
|   |                 | •  |  |                           |                        |  |          |                            |               |

#### **Additional Data**

Software ID: Software Version:

**EIN:** 35-6077116

Name: ROTARY CLUB OF COLUMBUS INDIANA

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

| (A) Name and address                            | (B) Title and average<br>hours per week<br>devoted to position | (C) Compensation<br>(If not paid,<br>enter -0) | (D) Contributions to<br>employee benefit plans<br>&<br>deferred compensation | (E) Expense<br>account and<br>other allowances |
|---|--|--|--|--|
| TROY FORMAN POBOX 1091 COLUMBUS,IN 47202        | PRESIDENT 5 00   | 0  | 0  | 0  |
| ALICE CURRY<br>POBOX 1091<br>COLUMBUS,IN 47202  | PRESIDENT<br>ELECT/PROGRAMS<br>5 00                            | 0  | 0  | 0  |
| KIRK CLARK<br>POBOX 1091<br>COLUMBUS,IN 47202   | SECRETARY 5 00   | 0  | 0  | 0  |
| TASHA MANN<br>POBOX 1091<br>COLUMBUS,IN 47202   | TREASURER 5 00   | 0  | 0  | 0  |
| TED OGLE<br>POBOX 1091<br>COLUMBUS,IN 47202     | PAST PRESIDENT 5 00  | 0  | 0  | 0  |
| MARK PILLAR<br>POBOX 1091<br>COLUMBUS,IN 47202  | MEMBERHSIP 5 00  | 0  | 0  | 0  |
| DAVID WARBLE<br>POBOX 1091<br>COLUMBUS,IN 47202 | SERGEANT AT ARMS<br>5 00                                       | 0  | 0  | 0  |

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#### TY 2009 Grants and Similar Amounts Paid Schedule

Name: ROTARY CLUB OF COLUMBUS INDIANA

**EIN:** 35-6077116

| Item No.                        | 1                                 |
|---------------------------------|-----------------------------------|
| Class of Activity               | CHARITABLE                        |
| Donee's Name                    | ROTARY FOUNDATION                 |
| Donee's Address                 | PO BOX 1091<br>COLUMBUS, IN 47202 |
| Amount (FMV)                    | 11,075                            |
| Purpose of Payment to Affiliate |                                   |
| Relationship                    | BROTHER/SISTER ORGANIZATION       |
| Description                     |                                   |
| Book Value                      |                                   |
| How BV Determined               |                                   |
| How FMV Determined              |                                   |
| Date of Gift                    | 2010-02                           |

| Item No.                        | 2                                 |
|---------------------------------|-----------------------------------|
| Class of Activity               | CHARITABLE                        |
| Donee's Name                    | ERNE SCHOLARSHIP FUND             |
| Donee's Address                 | PO BOX 1091<br>COLUMBUS, IN 47202 |
| Amount (FMV)                    | 10,200                            |
| Purpose of Payment to Affiliate |                                   |
| Relationship                    |                                   |
| Description                     |                                   |
| Book Value                      |                                   |
| How BV Determined               |                                   |
| How FMV Determined              |                                   |
| Date of Gift                    | 2010-06                           |

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## **TY 2009 Other Expenses Schedule**

Name: ROTARY CLUB OF COLUMBUS INDIANA

**EIN:** 35-6077116

| Description              | Amount |
|--------------------------|--------|
| DUES                     | 10,584 |
| CLUB SERVICE             | 3,224  |
| COMMUNITY SERVICE        | 8,853  |
| INTERNATIONAL SERVICE    | 6,050  |
| EXCHANGE STUDENT         | 3,108  |
| CONFERENCES AND MEETINGS | 3,093  |
| YOUTH SERVICE            | 579    |

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|                    | _                  |                 |                     |

### **TY 2009 Other Revenues Schedule**

Name: ROTARY CLUB OF COLUMBUS INDIANA

**EIN:** 35-6077116

| Description          | Amount |
|----------------------|--------|
| MEAL INCOME          | 18,241 |
| MISCELLANEOUS INCOME | 4,051  |

# **TY 2009 Transfers Personal Benefits Contracts Declaration**

Name: ROTARY CLUB OF COLUMBUS INDIANA

**EIN:** 35-6077116

**Declaration:** The organization did not, during the year, receive any funds,

directly, or indirectly, to pay premiums on a personal benefit contract. The organization, did not, during the year, pay any premiums, directly, or indirectly, on a personal benefit contract.