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Form 990-EZ

Department of the Treasury
Internal Revenue Service**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

2009Open to Public
Inspection

▶ 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 **JUL 1, 2009** and ending **JUN 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

BROOKLINE MASSACHUSETTS ROTARY CLUB

Number and street (or P.O. box, if mail is not delivered to street address)

P.O. BOX 136

City or town, state or country, and ZIP + 4

BROOKLINE, MA 02446

D Employer identification number

36-3981131

E Telephone number

617-852-0302

F 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: ▶ **NA**H Check ☒ if the organization is notJ Tax-exempt status (check only one) — ☒ 501(c) (4) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

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 ▶ \$ **83,162.****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	8,514.
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	9,998.
	4	Investment income	4	582.
	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 ☐		
	6a	Gross revenue (not including \$ of contributions reported on line 1)	6a	31,670.
	6b	Less: direct expenses other than fundraising expenses	6b	7,538.
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	24,132.	
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 ▶ LUNCH RECEIPTS)	8	32,398.	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	75,624.	
Net Assets or Fund Balances	10	Grants and similar amounts paid (attach schedule) STMT 3	10	32,881.
	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	135.
	16	Other expenses (describe ▶ SEE STATEMENT 1)	16	43,299.
	17	Total expenses. Add lines 10 through 16	17	76,315.
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-691.
	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	57,569.
	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	56,878.

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	66,264.	56,878.
23 Land and buildings		
24 Other assets (describe ▶)		
25 Total assets	66,264.	56,878.
26 Total liabilities (describe ▶ SEE STATEMENT 2)	8,695.	0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	57,569.	56,878.

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

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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.		
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	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	35b	N/A
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Sch. N	36	X
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	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?	38a	X
b If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	N/A
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9	39a	N/A
b Gross receipts, included on line 9, for public use of club facilities	39b	N/A
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		
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	X
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 ▶ 0.		
d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶ 0.		
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	X
41 List the states with which a copy of this return is filed. ▶ MA		
42a The organization's books are in care of ▶ CORPORATION Telephone no. ▶ 617-852-0302 Located at ▶ PO BOX 136, BROOKLINE, MA ZIP + 4 ▶ 02446		
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 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 ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 N/A		
44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44	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	45	X

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

	Yes	No
46		
47		
48		
49a		
49b		

(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				

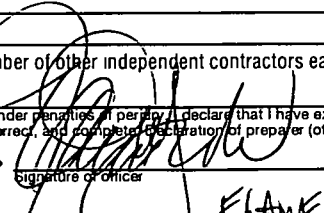
f Total number of other employees paid over \$100,000

- 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."

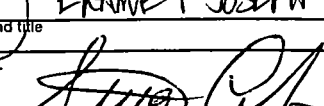
(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation

d Total number of other independent contractors each receiving over \$100,000

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.

Sign Here:  Date: 10/22/10

Type or print name and title: ELAINE P. JOSEPH - TREASURER

Paid Preparer's Use Only: Preparer's signature:  Date: 10/20/10 Check if self-employed: ☐ Preparer's identifying number (See instr.):

Firm's name (or yours if self-employed), address, and ZIP + 4: STUART COHEN, CPA, P.C.
233 NEEDHAM STREET, SUITE 300
NEWTON, MA 02464

EIN: Phone no. 617-454-1212

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

Yes ☐ No ☒

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FORM 990-EZ	OTHER EXPENSES	STATEMENT	1
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DESCRIPTION	AMOUNT
ACCOUNTING FEES	550.
AWARD DAY	1,170.
SUPPLIES AND MATERIALS	3,804.
LUNCH EXPENSES	26,881.
SOCIAL EVENTS, SEMINARS & CONFERENCES	2,794.
DUES AND FEES	6,561.
WEB SITE DEVELOPMENT	479.
ADVERTISING	1,060.
TOTAL TO FORM 990-EZ, LINE 16	43,299.

FORM 990-EZ	OTHER LIABILITIES	STATEMENT	2
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DESCRIPTION	BEG. OF YEAR	END OF YEAR
PHF CONTRIBUTIONS	424.	0.
HONDURAS PROJECT	8,271.	0.
TOTAL TO FORM 990-EZ, LINE 26	8,695.	0.

FORM 990-EZ

PAYMENTS TO AFFILIATES

STATEMENT 3

AFFILIATE'S NAME

AFFILIATES ADDRESS

SEE ATTACHED SCHEDULE

PURPOSE OF PAYMENT

AMOUNT

32,881.

TOTAL INCLUDED ON FORM 990-EZ, LINE 10

32,881.

Brookline Massachusetts Rotary Club
36-3981131 Schedule of Grants Paid
Form 940-EZ June 30, 2010

After the Prom Party/Brookline Rec Dept	2010 Donation	500 00
ArtBarn	Donation - Out of Box Production	500 00
Artsbridge	donation 2009	1,000 00
Brookline Arts Center		250 00
Brookline Booksmith	Books - Home for Little Wanderers from March 2010	250 00
Brookline Chamber of Commerce	2010 Golf Tournament	750 00
Brookline Community Mental Health Center	Donation	500 00
Brookline Community Mental Health Center	Donation from Yoga Ladies	80 00
Brookline Community Mental Health Center	Donation Gala 50th Anniv fundraiser	1,000 00
Brookline Education Foundation	Donation Spelling Bee - 2010	300 00
Brookline Emergency Food Pantry	Happy Dollars June 2009	250 00
Brookline Emergency Food Pantry	Happy Dollars Aug 2009	250 00
Brookline Emergency Food Pantry	Donation 2009	2,500 00
Brookline High School Peer Leaders	Happy Dollar Donation Sept 2009	250 00
BROOKLINE HIGH SCHOOL SCHOLARSHIP	2010 Scholarship fund 2 @ \$2000 each	4,000 00
Brookline Library Music Association	Dec 2009	250 00
Brookline Quest	2010	2,000 00
Brookline Sister City Project	Donation	500 00
Community Servings	Donation Dec 09 Happy \$'s	250 00
David O'Neil	Brookline Veterans Story Project Interview & Video	2,500 00
David O'Neil	Brookline Vets Story Project Interview & Video - bal due	590 00
Dudley St Neighborhood Initiative	ad book	250 00
Dudley St Neighborhood Initiative	BHS/Emerson Sch Literacy Donation 2010	250 00
Eastern Service Workers Association	2009 - for their 32 year anniversary	320 00
FIRST CORPS CADET BAND	Donation 2009	500 00
FIRST CORPS CADET BAND	Donation 2010	500 00
Friends of Devotion School	Tune Into Reading - Literacy Program 2009	2,000 00
Friends of Madame Whitesnake	Donation for children to attend the opera	250 00
George Chapman	Reim for DVD on Traces of the Trade	55 95
Gift of Life	Donation	5,000 00
Gifts for Guests	Womens Lunch Place Donation 2009	250 00
Honduras Water Project	Reimbursed grants	-8,000 00
John D Runkle School	Ship Books to Africa	500 00
Kids' Klothes Club	Donation Happy \$'s Oct 2009	250 00
Lloyd Gelineau	Domestic Violence Program 10 14 sponsor	250 00
ROTARY DISTRICT 7910 RYLA Acct	3 - \$250 SCHOLARSHIPS - 2010	750 00
ROTARY DISTRICT 7910	Haiti Donation Jan 2010 from Ace of Spades	1,000 00
ROTARY FOUNDATION	Yearly Foundation Giving from Club 2009	3,000 00
ROTARY FOUNDATION	Yearly Foundation Giving from Club 2008-2009	3,200 00
ROTARY INTERNATIONAL FOUNDATION	Polio Plus Contribution 2009-2010	2,000 00
ROTARY INTERNATIONAL FOUNDATION	Purple Pinky Collection	75 89
ROTARY INTERNATIONAL FOUNDATION	Purple Pinky Collection @ Pancake Breakfast 2010	60 24
Special Olympics - Massachusetts	2010 Boston marathon collection	948 77
Springwell	Donation Meals for Brookline Elders	250 00
Steps to success	Donation -2010	500 00
YOFES	Donation for Haitian Organization	250 00
Total		<u>32,880 85</u>

FORM 990-EZ

INFORMATION REGARDING TRANSFERS
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 4

- A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS,
DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL
BENEFIT CONTRACT? [] YES [X] NO
- B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS,
DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . [] YES [X] NO