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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	C Please use IRS label or print or type. See Specific Instructions. Alpha Gamma Delta Sorority XI Chapter 1409 North Main Bloomington, IL 61701	D Employer identification number 37-0677620
		E Telephone number (309) 556-3213
		F Group Exemption Number 0416

• 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. ► \$ 288,702.

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	
	3	Membership dues and assessments	3	284,835.
	4	Investment income	4	170.
	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	3,697.
6b	Less direct expenses other than fundraising expenses	6b	143.	
6c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	3,554.	
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 ►)	8		
9	Total revenue Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	288,559.	
EXPENSES	10	Grants and similar amounts paid (attach schedule)	10	3,500.
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	26,205.
	13	Professional fees and other payments to independent contractors	13	7,667.
	14	Occupancy, rent, utilities, and maintenance	14	116,117.
	15	Printing, publications, postage, and shipping	15	628.
	16	Other expenses (describe ► See Statement 2)	16	93,290.
	17	Total expenses Add lines 10 through 16	17	247,407.
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	41,152.	
ASSETS	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	36,136.
	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	77,288.

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	36,136.	77,288.
23 Land and buildings		
24 Other assets (describe ►)		
25 Total assets	36,136.	77,288.
26 Total liabilities (describe ►)	0.	0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	36,136.	77,288.

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

Form 990-EZ (2009)

Expenses

(Required for section 501(c)(3) and (4) organizations and section 4947(a)(1) trusts, optional for others)

28 a

29 a

30 a

31 a

32

(e) Expense account and other allowances

0.

Part V Other Information (Note the statement requirements in the instrs 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,' attach 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?		
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 instructions 37a 0.		
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 38b N/A		
39 Section 501(c)(7) organizations Enter		
a Initiation fees and capital contributions included on line 9 39a 7,200.		
b Gross receipts, included on line 9, for public use of club facilities 39b 0.		
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		
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 None		

42a The organization's books are in care of **Morgan Wilson** Telephone no. **(309) 824-4333**
 Located at **1409 North Main Bloomington IL** ZIP + 4 **61701**

	Yes	No
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 42b		X
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.? If 'Yes,' enter the name of the foreign country 42c		X

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
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

Part VII **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 | | |
| 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? | | |
| 49b If 'Yes,' was the related organization a section 527 organization? | | |
- 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?
- 49b** 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.'

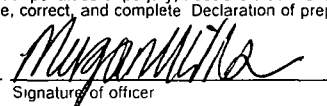
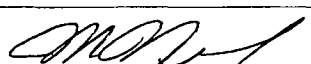
(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowances

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 ▶

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 ▶ Morgan Wilson Type or print name and title	01/05/11 Date	Finance Advisor	
Paid Preparer's Use Only	Preparer's signature ▶ 	Date 12-28-10	Check if self-employed ▶ ☐	Preparer's Identifying Number (See instructions) P00670704
	Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ Henning, Strouse, Jordan & Stephens ▶ 2712 McGraw Drive ▶ Bloomington, IL 61704		EIN ▶ 26-3334905 Phone no ▶ (309) 663-1353	
	May the IRS discuss this return with the preparer shown above? See instructions. ▶ ☒ Yes ☐ No			

Client 1002

Alpha Gamma Delta Sorority
XI Chapter

37-0677620

12/22/10

01 39PM

Statement 1
Form 990-EZ, Part I, Line 10
Grants and Similar Amounts Paid

Donee's Name:	Alpha Gamma Delta Foundation		
Cash Amount Given:		\$	3,300.
Donee's Name:	Kappa Delta		
Cash Amount Given:		\$	200.

Statement 2
Form 990-EZ, Part I, Line 16
Other Expenses

Bank Charges	\$	2,552.
Conferences, Conventions, and Meetings		3,816.
House Department		3,930.
Membership		45,764.
Miscellaneous		15,134.
Reimbursed items		2,191.
Social and Recruitment		16,215.
Supplies		3,088.
Technology		600.
Total	\$	93,290.

Statement 3
Form 990-EZ, Part III
Organization's Primary Exempt Purpose

Educational, charitable and social purposes and no net earnings inure to an individual or private shareholder.

Statement 4
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
Kim Matteson 1409 N. Main Street Bloomington, IL 61704	President 5.00	\$ 0.	\$ 0.	0.
Jazmyn Becker 1409 N. Main Street Bloomington, IL 61701	VP Member Dev. 3.00	0.	0.	0.
Morgan Wilson 1409 North Main Bloomington, IL 61701	Finance Advisor 3.00	0.	0.	0.

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Alpha Gamma Delta Sorority
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Statement 4 (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
Cindy Gregory 1409 North Main Bloomington, IL 61701	VP Scholarship 3.00	\$ 0.	\$ 0.	\$ 0.
Jordan Diehl 1409 North Main Bloomington, IL 61701	VP Recruitment 3.00	0.	0.	0.
Carolyn Pluta 1409 North Main Bloomington, IL 61701	VP Operations 3.00	0.	0.	0.
Katie Trowitch 1409 North Main Bloomington, IL 61701	VP Finance 3.00	0.	0.	0.
Brooke Bernardoni 1409 North Main Bloomington, IL 61701	VP Campus Rel. 3.00	0.	0.	0.
Lauren Kier 1409 North Main Bloomington, IL 61701	Property 3.00	0.	0.	0.
Sarah Halford 1409 North Main Bloomington, IL 61701	New Member Recr 1.00	0.	0.	0.
Nikki Salansky 1409 North Main Bloomington, IL 61701	Social 1.00	0.	0.	0.
Emily Szymiski 1409 North Main Bloomington, IL 61701	Membership 1.00	0.	0.	0.
Hannah Corley 1409 North Main Bloomington, IL 61701	Sisterhood 1.00	0.	0.	0.
Sam Studzinski 1409 North Main Bloomington, IL 61701	Ritual 1.00	0.	0.	0.
Anna DeGraaf 1409 North Main Bloomington, IL 61701	Personal Dev. 1.00	0.	0.	0.

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Alpha Gamma Delta Sorority
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Statement 4 (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
Sarah Zahorak 1409 North Main Bloomington, IL 61701	Alumnae Rel 1.00	\$ 0.	\$ 0.	\$ 0.
Allie Veitengruber 1409 North Main Bloomington, IL 61701	Philanthropy 1.00	0.	0.	0.
Kelly Cook 1409 North Main Bloomington, IL 61701	Activities 1.00	0.	0.	0.
Lindsay Starr 1409 North Main Bloomington, IL 61701	Purchasing 1.00	0.	0.	0.
Nicole Taylor 1409 North Main Bloomington, IL 61701	Risk Management 1.00	0.	0.	0.
Kathleen Zeman 1409 North Main Bloomington, IL 61701	Correspondance 1.00	0.	0.	0.
Maddie Hoffman 1409 North Main Bloomington, IL 61701	Publications 1.00	0.	0.	0.
Crystal Thelen 1409 North Main Bloomington, IL 61701	Public Relation 1.00	0.	0.	0.
Kelsey Finch 1409 North Main Bloomington, IL 61701	Senate 1.00	0.	0.	0.
Paige Durcholz 1409 North Main Bloomington, IL 61701	Website Coord. 1.00	0.	0.	0.
	Total	\$ 0.	\$ 0.	\$ 0.