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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)

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.

OMB No 1545-1150

2009

Open to Public Inspection

Please use IRS label or print or type. See Specific Instructions.

C Name of organization
ROTARY CLUB OF INDEPENDENCE MO INC

Number and street (or P O box, if mail is not delivered to street address)Room/suite
PO BOX 176

City or town, state or country, and ZIP + 4
INDEPENDENCE, MO 64051

D Employer identification number
43-6052948

E Telephone number
(816) 833-6650

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.ROTARY-INDEPENDENCE-MO.ORG

H Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

J Tax-Exempt status (check only one) ☒ 501(c)(4) (Insert no) ☐ 4947(a)(1) or ☐ 527

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 \$ 79,875

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	170,138
	2	Program service revenue including government fees and contracts	9,471
	3	Membership dues and assessments	
	4	Investment income	23
	5a	Gross amount from sale of assets other than inventory5a	5c
	b	Less cost or other basis and sales expenses5b	
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	
	6	Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>	6c
	a	Gross revenue (not including \$ of contributions reported on line 1)6a	
	b	Less direct expenses other than fundraising expenses6b	
Expenses	c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	
	7a	Gross sales of inventory, less returns and allowances7a243	7c
	b	Less cost of goods sold7b331	
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	
	8	Other revenue (describe _____)8	9
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	
	10	Grants and similar amounts paid (attach schedule)1039,826	
	11	Benefits paid to or for members11	13
	12	Salaries, other compensation, and employee benefits12	
	13	Professional fees and other payments to independent contractors131,598	
Net Assets	14	Occupancy, rent, utilities, and maintenance14	16
	15	Printing, publications, postage, and shipping15	
	16	Other expenses (describe _____)1646,939	
	17	Total expenses. Add lines 10 through 161788,363	18
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)18-8,819	
	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)1928,288	
	20	Other changes in net assets or fund balances (attach explanation)20	21
	21	Net assets or fund balances at end of year. Combine lines 18 through 202119,469	

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)

22 Cash, savings, and investments

23 Land and buildings

24 Other assets (describe _____)

25 Total assets

26 Total liabilities (describe _____)

27 Net assets or fund balances (line 27 of column (B) must agree with line 21) .

(A) Beginning of year

30,135

30,135

1,847

28,288

(B) End of year

21,913

21,913

2,444

19,469

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions. Cat No 10642I Form 990-EZ (2009)

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)	
What is the organization's primary exempt purpose? TO FUND SCHOLARSHIPS AND COMMUNITY ORGANIZATIONS			
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			
28 PROVIDE WEEKLY MEETINGS FOR MEMBERS AND COMMUNITY SERVICE (Grants \$ 39,826) If this amount includes foreign grants, check here . . . <input type="checkbox"/>		28a	88,363
29			
(Grants \$) If this amount includes foreign grants, check here . . . <input type="checkbox"/>		29a	
30			
(Grants \$) 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)		32	88,363

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

Part VOther 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	Section 501(c)(7) organizations. Enter		
a	Initiation fees and capital contributions included on line 9	39a	
b	Gross receipts, included on line 9, for public use of club facilities	39b	
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	No
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	No
41	List the states with which a copy of this return is filed ▶ _____		
42a	The organization's books are in care of ▶ <u>RON FINKE</u> Telephone no ▶ <u>(816) 833-6650</u> 4200 LITTLE BLUE PARKWAY SUITE 620 Located at ▶ <u>INDEPENDENCE, MO</u> ZIP + 4 ▶ <u>64057</u>		
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 ▶ _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts .	42b	No
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	No
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> 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? <i>If "Yes", Form 990 must be completed instead of Form 990-EZ.</i>	44	No
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? <i>If "Yes", Form 990 must be completed instead of Form 990-EZ.</i>	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.

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	Yes	No
47	Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II		
48	Is the organization a school 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 & deferred compensation	(e) Expense account and other allowances

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















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: *****		Date: 2010-11-30		
Paid Preparer's Use Only	Preparer's signature: VAUGHN P CORNISH		Date: 2010-12-10	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: SCHMIDT CORNISH & SMITH CPA'S 740 NW BLUE PARKWAY STE 200 LEES SUMMIT, MO 64086				EIN:
					Phone no: (816) 554-6717
	May the IRS discuss this return with the preparer shown above? See instructions				<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Additional Data

Software ID:
Software Version:
EIN: 43-6052948
Name: ROTARY CLUB OF INDEPENDENCE MO INC

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
JIM BLAU  PO BOX 176 INDEPENDENCE, MO 64051	PAST PRESIDE 0	0		
HAP GRAFF  PO BOX 176 INDEPENDENCE, MO 64051	PRESIDENT 0	0		
ALLEN GARNER  PO BOX 176 INDEPENDENCE, MO 64051	PRESIDENT EL 0	0		
TOM WATERS  PO BOX 176 INDEPENDENCE, MO 64051	V PRESIDENT 0	0		
RON THORNBURY  PO BOX 176 INDEPENDENCE, MO 64051	SECRETARY 0	0		
GREG FINKE  PO BOX 176 INDEPENDENCE, MO 64051	DIRECTOR 0	0		
SHELLY HALL-PETERSON  PO BOX 176 INDEPENDENCE, MO 64051	TREASURER 0	0		
LORI WORTH-SMITH  PO BOX 176 INDEPENDENCE, MO 64051	DIRECTOR 0	0		
RON FINKE  PO BOX 176 INDEPENDENCE, MO 64051	ASST TREASU 0	0		
JUDY STILES  PO BOX 176 INDEPENDENCE, MO 64051	ASST SECRET 0	0		
LARRY COOK  PO BOX 176 INDEPENDENCE, MO 64051	DIRECTOR 0	0		
DIANA CASTEEL  PO BOX 176 INDEPENDENCE, MO 64051	DIRECTOR 0	0		
BOB WAYMAN  PO BOX 176 INDEPENDENCE, MO 64051	DIRECTOR 0	0		
JOHN PRITCHARD  PO BOX 176 INDEPENDENCE, MO 64051	DIRECTOR 0	0		

TY 2009 Compensation Explanation**Name:** ROTARY CLUB OF INDEPENDENCE MO INC**EIN:** 43-6052948

Person Name	Explanation
JIM BLAU	
HAP GRAFF	
ALLEN GARNER	
TOM WATERS	
RON THORNBURY	
GREG FINKE	
SHELLY HALLPETERSON	
LORI WORTHSMITH	
RON FINKE	
JUDY STILES	
LARRY COOK	
DIANA CASTEEL	
BOB WAYMAN	
JOHN PRITCHARD	

TY 2009 Other Expenses Schedule**Name:** ROTARY CLUB OF INDEPENDENCE MO INC**EIN:** 43-6052948

Description	Amount
EXPENSES	
FLOWERS	70
CHAMBER DUES	330
BADGES	230
AWARDS	370
PINS, ETC	212
POSTAGE/COPIES/PRINTING	1,472
PLAQUES	231
EQUIPMENT	1,195
MEALS	28,162
DUES	8,010
CONFERENCES	990
BANQUET COSTS	2,563
MISCELLANEOUS	15
MEMBERSHIP DRIVE	655
TICKETS PURCHASED	1,768
BANDANAS	347
KC DAY BUNDLE SALES	175
SURETY BOND	144

TY 2009 Other Liabilities Schedule

Name: ROTARY CLUB OF INDEPENDENCE MO INC

EIN: 43-6052948

Description	Beginning of Year Amount	End of Year Amount
DEFERRED REVENUE	1,847	2,444
	1,847	2,444