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Form



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

A For the 2009 calendar year, or tax year beginning 07-01-2009 , and ending 06-30-2010

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
Instruc-
tions.**

C Name of organization
KAPPA ALPHA ORDER ZETA THETA CHAPTER

Number and street (or P O box, if mail is not delivered to street address) JAMES MADISON UNIVERSITY MSC 3518	Room/suite
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City or town, state or country, and ZIP + 4
HARRISONBURG, VA 22807

D Employer identification number

54-1705195

E Telephone number

(410) 596-8874

F Group Exemption
Number 0066

◆ 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) ▶

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? COLLEGIATE SOCIAL FRATERNITY			
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 COLLEGIATE SOCIAL FRATERNITY (Grants \$ 0) If this amount includes foreign grants, check here . . . ☐		28a	0
29 (Grants \$) If this amount includes foreign grants, check here . . . ☐		29a	
30 (Grants \$) If this amount includes foreign grants, check here . . . ☐		30a	
31 Other program services (attach schedule) (Grants \$) If this amount includes foreign grants, check here . . . ☐		31a	
32 Total program service expenses (add lines 28a through 31a)		32	

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 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	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	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 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	5,060
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 ▶, 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	
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 ▶ JOSH MEYER Telephone no ▶ (410) 596-8874 JAMES MADISON UNIVERSITY MSC 3518 Located at ▶ HARRISONBURG, VA ZIP + 4 ▶ 22807		
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 ▶ 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? If "Yes", Form 990 must be completed instead of 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.	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		2010-11-07 Date	
Paid Preparer's Use Only	JOSH MEYER, TREASURER Type or print name and title			
	Preparer's signature	RAETZ HAWKINS PC CPAs	Date	Check if self-employed ☐
	Firm's name (or yours if self-employed), address, and ZIP + 4			Preparer's identifying number (See instructions)
	RAETZ & HAWKINS PC CPAs 128 SOUTH RANDOLPH STREET LEXINGTON, VA 244500916			EIN Phone no (540) 463-7121
May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No				

Additional Data

Software ID:
Software Version:
EIN: 54-1705195
Name: KAPPA ALPHA ORDER ZETA THETA CHAPTER

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
SADEQ KHAN JMU MSC 3518 HARRISONBURG,VA 22807	I 0 00	0	0	0
ERIC JOHNSON JMU MSC 3518 HARRISONBURG,VA 22807	II 0 00	0	0	0
MIKE DIVINEY JMU MSC 3518 HARRISONBURG,VA 22807	III 0 00	0	0	0
MIKE GARZONE JMU MSC 3518 HARRISONBURG,VA 22807	IV 0 00	0	0	0
IAN YEAGER JMU MSC 3518 HARRISONBURG,VA 22807	V 0 00	0	0	0
JOSH MEYER JMU MSC 3518 HARRISONBURG,VA 22807	VI 0 00	0	0	0
CHRIS RUSSO JMU MSC 3518 HARRISONBURG,VA 22807	VII 0 00	0	0	0
BRAD HERSHEY JMU MSC 3518 HARRISONBURG,VA 22807	VIII 0 00	0	0	0
NICK BROCCOLI JMU MSC 3518 HARRISONBURG,VA 22807	IX 0 00	0	0	0

TY 2009 Grants and Similar Amounts Paid Schedule

Name: KAPPA ALPHA ORDER ZETA THETA CHAPTER

EIN: 54-1705195

Item No.	1
Class of Activity	
Donee's Name	KAPPA ALPHA ORDER
Donee's Address	P O BOX 1865 LEXINGTON, VA 24450
Amount (FMV)	15,809
Purpose of Payment to Affiliate	MEMBER DUES & ASSESSMENTS
Relationship	
Description	
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

TY 2009 Other Expenses Schedule

Name: KAPPA ALPHA ORDER ZETA THETA CHAPTER

EIN: 54-1705195

Description	Amount
ENTERTAINMENT, SOCIAL & BANDS	1,500
RUSH & RECRUITMENT	1,258
CHARITY & PHILANTHROPY	13,000
IFC & INTRAMURALS	165
SUPPLIES & HOUSE IMPROVEMENTS	1,648
PROVINCE COUNCILS, CONVENTIONS & MEETINGS	1,241
COMPOSITE	2,000
REPAIRS & MAINTENANCE	500
EQUIPMENT RENTAL	350
ALUMNI & SPECIAL EVENTS	600
SPECIAL EVENTS EXPENSE	8,206
FOOD & BEVERAGE EXPENSE	2,162
TRAVEL EXPENSE	671
INSURANCE EXPENSE	2,805

TY 2009 Transfers Personal Benefits Contracts Declaration

Name: KAPPA ALPHA ORDER ZETA THETA CHAPTER

EIN: 54-1705195

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.