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**A** For the 2009 calendar year, or tax year beginning **07/01/09**, and ending **06/30/10**

**B** Check if applicable:  
☐ Address change  
☐ Name change  
☐ Initial return  
☐ Termination  
☐ Amended return  
☐ Application pending

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

**C** Name of organization  
**ALPHA OMICRON PI FRATERNITY, INC.**  
Doing Business As  
Number and street (or P O box if mail is not delivered to street address) Room/suite  
**5390 VIRGINIA WAY**  
City or town, state or country, and ZIP + 4  
**BRENTWOOD TN 37027**

**D** Employer identification number  
**62-0950113**

**E** Telephone number  
**615-370-0920**

**G** Gross receipts \$ **3,983,484**

**F** Name and address of principal officer  
**TROY LEFORGE**  
**SAME AS C ABOVE**

**H(a)** Is this a group return for affiliates? ☐ Yes ☒ No  
**H(b)** Are all affiliates included? ☐ Yes ☐ No  
If "No," attach a list. (see instructions)

**I** Tax-exempt status ☒ 501(c) ( **7** ) ◀ (insert no ) ☐ 4947(a)(1) or ☐ 527

**J** Website: ▶ **WWW.ALPHAMICRONPI.ORG**

**K** Type of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶

**L** Year of formation **1897**

**M** State of legal domicile **TN**

**Part I Summary**

**1** Briefly describe the organization's mission or most significant activities:  
**TO ENCOURAGE A SPIRIT OF FRATERNITY & LOVE AMONG ITS MEMBERS; PROMOTES INTEGRITY, DIGNITY, SCHOLARSHIP, & COLLEGE LOYALTY; SUPPORTS THE BEST INTERESTS OF THE COLLEGES AND UNIVERSITIES IN WHICH CHAPTERS ARE INSTALLED.**

**2** Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

**3** Number of voting members of the governing body (Part VI, line 1a)

**4** Number of independent voting members of the governing body (Part VI, line 1b)

**5** Total number of employees (Part V, line 2a)

**6** Total number of volunteers (estimate if necessary)

**7a** Total gross unrelated business revenue from Part VIII, column (C), line 12

**7b** Net unrelated business taxable income from Form 990-T, line 34

**8** Contributions and grants (Part VIII, line 1h)

**9** Program service revenue (Part VIII, line 2g)

**10** Investment income (Part VIII, column (A), lines 3, 4, and 7d)

**11** Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

**12** Total revenue – add lines 8 through 11 (must equal Part VIII, column (A), line 12)

**13** Grants and similar amounts paid (Part IX, column (A), lines 1–3)

**14** Benefits paid to or for members (Part IX, column (A), line 4)

**15** Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

**16a** Professional fundraising fees (Part IX, column (A), line 11e)

**b** Total fundraising expenses (Part IX, column (D), line 25) ▶

**17** Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)

**18** Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)

**19** Revenue less expenses. Subtract line 18 from line 12

**20** Total assets (Part X, line 16)

**21** Total liabilities (Part X, line 26)

**22** Net assets or fund balances. Subtract line 21 from line 20

|            | Prior Year        | Current Year      |
|------------|-------------------|-------------------|
| <b>3</b>   | <b>8</b>          |                   |
| <b>4</b>   | <b>8</b>          |                   |
| <b>5</b>   | <b>46</b>         |                   |
| <b>6</b>   | <b>110</b>        |                   |
| <b>7a</b>  | <b>13,103</b>     |                   |
| <b>7b</b>  | <b>12,103</b>     |                   |
| <b>8</b>   | <b>1,749,011</b>  | <b>1,883,180</b>  |
| <b>9</b>   | <b>1,592,852</b>  | <b>1,133,039</b>  |
| <b>10</b>  | <b>37,291</b>     | <b>64,378</b>     |
| <b>11</b>  | <b>468,002</b>    | <b>449,332</b>    |
| <b>12</b>  | <b>3,847,156</b>  | <b>3,529,929</b>  |
| <b>13</b>  |                   |                   |
| <b>14</b>  |                   |                   |
| <b>15</b>  | <b>1,481,750</b>  | <b>1,297,552</b>  |
| <b>16a</b> |                   |                   |
| <b>b</b>   |                   |                   |
| <b>17</b>  | <b>2,321,076</b>  | <b>1,879,343</b>  |
| <b>18</b>  | <b>3,802,826</b>  | <b>3,176,895</b>  |
| <b>19</b>  | <b>44,330</b>     | <b>353,034</b>    |
| <b>20</b>  | <b>18,018,708</b> | <b>18,223,935</b> |
| <b>21</b>  | <b>4,026,405</b>  | <b>3,965,692</b>  |
| <b>22</b>  | <b>13,992,303</b> | <b>14,258,243</b> |

**Part II Signature Block**

**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, this true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Signature of officer  
**Troy J. Leforge**  
Type or print name and title  
**Secretary**

Date  
**11/15/10**

**Paid Preparer's Use Only**

Preparer's signature  
**Sherry Corner, CPA**  
Firm's name (or yours if self-employed), address, and ZIP + 4  
**PURYEAR HAMILTON HAUSMAN & WOOD, PLC**  
**2000 CORPORATE CENTRE DRIVE, SUITE 200**  
**FRANKLIN, TN 37067**

Date  
**11.15.10**

Check if self-employed ☐

Preparer's identifying number (see instructions)  
**00014365**

EIN ▶ **62-0788068**

Phone no ▶ **615-771-3600**

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

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

DAA Form **990** (2009)

**Part III Statement of Program Service Accomplishments****1** Briefly describe the organization's mission:

**TO ENCOURAGE A SPIRIT OF FRATERNITY & LOVE AMONG ITS MEMBERS; PROMOTES INTEGRITY, DIGNITY, SCHOLARSHIP, & COLLEGE LOYALTY; SUPPORTS THE BEST INTERESTS OF THE COLLEGES AND UNIVERSITIES IN WHICH CHAPTERS ARE INSTALLED.**

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )  
**ALPHA OMICRON PI FRATERNITY, INC. PROVIDES SERVICES FOR THE UNDERGRADUATE CHAPTERS TO SUPPORT THE FRATERNITY'S EXEMPT PURPOSE.**

**4b** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

**4c** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

**4d** Other program services. (Describe in Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses ▶

**Part IV Checklist of Required Schedules**

|                                                                                                                                                                                                                                                              | Yes      | No       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| <b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A                                                                                                                   |          | <b>X</b> |
| <b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors?                                                                                                                                                                      | <b>X</b> |          |
| <b>3</b> 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                                                                |          | <b>X</b> |
| <b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II                                                                                                                  |          |          |
| <b>5</b> <b>Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations.</b> Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III                                        |          |          |
| <b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I  |          | <b>X</b> |
| <b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II                                      |          | <b>X</b> |
| <b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III                                                                                                   |          | <b>X</b> |
| <b>9</b> Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV |          | <b>X</b> |
| <b>10</b> Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V                                                                                       |          | <b>X</b> |
| <b>11</b> Is the organization's answer to any of the following questions "Yes"? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable                                                                                                      | <b>X</b> |          |
| • Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.                                                                                                                       |          |          |
| • Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.                                                     |          |          |
| • Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.                                                     |          |          |
| • Did the organization report an amount for other assets related in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.                                                              |          |          |
| • Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.                                                                                                                                     |          |          |
| • Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If "Yes," complete Schedule D, Part X.                      |          |          |
| <b>12</b> Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII.                                                                                           |          | <b>X</b> |
| <b>12A</b> Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional.                                                                   | <b>X</b> |          |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E                                                                                                                                                  |          | <b>X</b> |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?                                                                                                                                                       |          | <b>X</b> |
| <b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Part I                             |          | <b>X</b> |
| <b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Part II                                      |          | <b>X</b> |
| <b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Part III                                          |          | <b>X</b> |
| <b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I                                                         |          | <b>X</b> |
| <b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II                                                                     |          | <b>X</b> |
| <b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III                                                                                               |          | <b>X</b> |
| <b>20</b> Did the organization operate one or more hospitals? If "Yes," complete Schedule H                                                                                                                                                                  |          | <b>X</b> |

**Part IV Checklist of Required Schedules (continued)**

|                                                                                                                                                                                                                                                                                          | Yes        | No       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|----------|
| <b>21</b> Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II                                                               | <b>21</b>  | <b>X</b> |
| <b>22</b> Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III                                                                                | <b>22</b>  | <b>X</b> |
| <b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J                           | <b>23</b>  | <b>X</b> |
| <b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25 | <b>24a</b> | <b>X</b> |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?                                                                                                                                                                               | <b>24b</b> |          |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?                                                                                                                                      | <b>24c</b> |          |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?                                                                                                                                                                         | <b>24d</b> |          |
| <b>25a</b> <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I                                                                          | <b>25a</b> |          |
| <b>b</b> Is the organization 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             | <b>25b</b> |          |
| <b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II                                         | <b>26</b>  | <b>X</b> |
| <b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? If "Yes," complete Schedule L, Part III                 | <b>27</b>  | <b>X</b> |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):                                                                                  |            |          |
| <b>a</b> A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV                                                                                                                                                                         | <b>28a</b> | <b>X</b> |
| <b>b</b> A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV                                                                                                                                                      | <b>28b</b> | <b>X</b> |
| <b>c</b> An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV                                              | <b>28c</b> | <b>X</b> |
| <b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M                                                                                                                                                                       | <b>29</b>  | <b>X</b> |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M                                                                                                       | <b>30</b>  | <b>X</b> |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I                                                                                                                                                             | <b>31</b>  | <b>X</b> |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II                                                                                                                                           | <b>32</b>  | <b>X</b> |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I                                                                                           | <b>33</b>  | <b>X</b> |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1                                                                                                                                              | <b>34</b>  | <b>X</b> |
| <b>35</b> Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2                                                                                                                                        | <b>35</b>  | <b>X</b> |
| <b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2                                                                                                | <b>36</b>  |          |
| <b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI                                                  | <b>37</b>  | <b>X</b> |
| <b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.                                                                                            | <b>38</b>  | <b>X</b> |

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

|     |                                                                                                                                                                                                                                                                              | Yes | No      |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|---------|
| 1a  | Enter the number reported in Box 3 of Form 1096 Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable                                                                                                                                      | 1a  | 15      |
| b   | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable                                                                                                                                                                                              | 1b  | 0       |
| c   | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?                                                                                                                     | 1c  | X       |
| 2a  | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return                                                                                                | 2a  | 46      |
| b   | If at least one is reported on line 2a, did the organization file all required federal employment tax returns?<br><b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)                              | 2b  | X       |
| 3a  | Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?                                                                                                                                                         | 3a  | X       |
| b   | If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O                                                                                                                                                                             | 3b  | X       |
| 4a  | 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)?                                   | 4a  | X       |
| b   | If "Yes," enter the name of the foreign country: <b>CANADA</b><br>See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.                                                                          |     |         |
| 5a  | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?                                                                                                                                                                        | 5a  | X       |
| b   | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?                                                                                                                                                             | 5b  | X       |
| c   | If "Yes," to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?                                                                                                                             | 5c  |         |
| 6a  | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?                                                                                                  | 6a  | X       |
| b   | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?                                                                                                                                | 6b  |         |
| 7   | <b>Organizations that may receive deductible contributions under section 170(c).</b>                                                                                                                                                                                         |     |         |
| a   | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?                                                                                                                              | 7a  | X       |
| b   | If "Yes," did the organization notify the donor of the value of the goods or services provided?                                                                                                                                                                              | 7b  |         |
| c   | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?                                                                                                                                         | 7c  | X       |
| d   | If "Yes," indicate the number of Forms 8282 filed during the year                                                                                                                                                                                                            | 7d  |         |
| e   | Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?                                                                                                                                            | 7e  | X       |
| f   | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?                                                                                                                                                                 | 7f  | X       |
| g   | For all contributions of qualified intellectual property, did the organization file Form 8899 as required?                                                                                                                                                                   | 7g  | X       |
| h   | For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?                                                                                                                                                        | 7h  | X       |
| 8   | <b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | 8   |         |
| 9   | <b>Sponsoring organizations maintaining donor advised funds.</b>                                                                                                                                                                                                             |     |         |
| a   | Did the organization make any taxable distributions under section 4966?                                                                                                                                                                                                      | 9a  |         |
| b   | Did the organization make a distribution to a donor, donor advisor, or related person?                                                                                                                                                                                       | 9b  |         |
| 10  | <b>Section 501(c)(7) organizations.</b> Enter:                                                                                                                                                                                                                               |     |         |
| a   | Initiation fees and capital contributions included on Part VIII, line 12                                                                                                                                                                                                     | 10a | 539,550 |
| b   | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities                                                                                                                                                                                  | 10b |         |
| 11  | <b>Section 501(c)(12) organizations.</b> Enter:                                                                                                                                                                                                                              |     |         |
| a   | Gross income from members or shareholders                                                                                                                                                                                                                                    | 11a |         |
| b   | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)                                                                                                                                                 | 11b |         |
| 12a | <b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?                                                                                                                                                            | 12a |         |
| b   | If "Yes," enter the amount of tax-exempt interest received or accrued during the year                                                                                                                                                                                        | 12b |         |

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.**Section A. Governing Body and Management**

|                                                                                                                                                                                                                       | Yes | No |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a Enter the number of voting members of the governing body                                                                                                                                                           | 8   |    |
| b Enter the number of voting members that are independent                                                                                                                                                             | 8   |    |
| 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?                                               |     | X  |
| 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? |     | X  |
| 4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?                                                                                               |     | X  |
| 5 Did the organization become aware during the year of a material diversion of the organization's assets?                                                                                                             |     | X  |
| 6 Does the organization have members or stockholders?                                                                                                                                                                 | X   |    |
| 7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?                                                                                        | X   |    |
| b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?                                                                                                             | X   |    |
| 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:                                                                                   |     |    |
| a The governing body?                                                                                                                                                                                                 | X   |    |
| b Each committee with authority to act on behalf of the governing body?                                                                                                                                               | X   |    |
| 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O        |     | X  |

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

|                                                                                                                                                                                                                                                                                                  | Yes | No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 10a Does the organization have local chapters, branches, or affiliates?                                                                                                                                                                                                                          | X   |    |
| b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?                                                                             | X   |    |
| 11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?                                                                                                                                                                            | X   |    |
| 11a Describe in Schedule O the process, if any, used by the organization to review this Form 990.                                                                                                                                                                                                |     |    |
| 12a Does the organization have a written conflict of interest policy? If "No," go to line 13                                                                                                                                                                                                     | X   |    |
| b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?                                                                                                                                                              | X   |    |
| c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done                                                                                                                                             | X   |    |
| 13 Does the organization have a written whistleblower policy?                                                                                                                                                                                                                                    | X   |    |
| 14 Does the organization have a written document retention and destruction policy?                                                                                                                                                                                                               | X   |    |
| 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?                                                                          |     |    |
| a The organization's CEO, Executive Director, or top management official                                                                                                                                                                                                                         | X   |    |
| b Other officers or key employees of the organization                                                                                                                                                                                                                                            |     | X  |
| If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions.)                                                                                                                                                                                                             |     |    |
| 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?                                                                                                                                        |     | X  |
| b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? |     |    |

**Section C. Disclosure**

17 List the states with which a copy of this Form 990 is required to be filed ► **TN**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☐ Own website ☒ Another's website ☐ Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ► **BETH BRAGG** **5390 VIRGINIA WAY** **615-370-0920**  
**BRENTWOOD** **TN 37027**





**Part VIII Statement of Revenue**

|                                                                                                                                       |                                                                                            |                                                                                          | (A)<br>Total revenue | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from tax<br>under sections<br>512, 513, or 514 |
|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------------|----------------------------------------------------|-----------------------------------------|---------------------------------------------------------------------------|
| <b>Contributions, gifts, grants<br/>and other similar amounts</b>                                                                     | <b>1a</b> Federated campaigns                                                              | <b>1a</b>                                                                                |                      |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>b</b> Membership dues                                                                   | <b>1b</b>                                                                                | 1,633,225            |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>c</b> Fundraising events                                                                | <b>1c</b>                                                                                |                      |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>d</b> Related organizations                                                             | <b>1d</b>                                                                                | 120,752              |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>e</b> Government grants (contributions)                                                 | <b>1e</b>                                                                                |                      |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>f</b> All other contributions, gifts, grants,<br>and similar amounts not included above | <b>1f</b>                                                                                | 129,203              |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>g</b> Noncash contributions included in lines 1a-1f                                     | \$                                                                                       |                      |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>h Total.</b> Add lines 1a-1f                                                            |                                                                                          | 1,883,180            |                                                    |                                         |                                                                           |
| <b>Program Service Revenue</b>                                                                                                        | <b>2a</b> LIABILITY & PROP INSURANCE                                                       | Busn. Code 900099                                                                        | 483,276              | 483,276                                            |                                         |                                                                           |
|                                                                                                                                       | <b>b</b> LEADERSHIP INSTITUTE                                                              | 900099                                                                                   | 482,824              | 482,824                                            |                                         |                                                                           |
|                                                                                                                                       | <b>c</b> MISCELLANEOUS                                                                     | 900099                                                                                   | 103,792              | 103,792                                            |                                         |                                                                           |
|                                                                                                                                       | <b>d</b> RENTALS TO FRATERNITY                                                             | 900099                                                                                   | 57,604               | 57,604                                             |                                         |                                                                           |
|                                                                                                                                       | <b>e</b> RENTALS TO AFFILIATE                                                              | 531110                                                                                   | 5,543                |                                                    | 5,543                                   |                                                                           |
|                                                                                                                                       | <b>f</b> All other program service revenue                                                 |                                                                                          |                      |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>g Total.</b> Add lines 2a-2f                                                            |                                                                                          | 1,133,039            |                                                    |                                         |                                                                           |
|                                                                                                                                       | <b>Other Revenue</b>                                                                       | <b>3</b> Investment income (including dividends, interest, and<br>other similar amounts) |                      | 39,656                                             |                                         |                                                                           |
| <b>4</b> Income from investment of tax-exempt bond proceeds                                                                           |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>5</b> Royalties                                                                                                                    |                                                                                            |                                                                                          | 79,795               |                                                    |                                         | 79,795                                                                    |
| <b>6a</b> Gross Rents                                                                                                                 |                                                                                            | (i) Real 7,560 (ii) Personal                                                             |                      |                                                    |                                         |                                                                           |
| <b>b</b> Less rental exps.                                                                                                            |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>c</b> Rental inc or (loss)                                                                                                         |                                                                                            | 7,560                                                                                    |                      |                                                    |                                         |                                                                           |
| <b>d</b> Net rental income or (loss)                                                                                                  |                                                                                            |                                                                                          | 7,560                |                                                    | 7,560                                   |                                                                           |
| <b>7a</b> Gross amount from<br>sales of assets<br>other than inventory                                                                |                                                                                            | (i) Securities 99,523 (ii) Other                                                         |                      |                                                    |                                         |                                                                           |
| <b>b</b> Less cost or other<br>basis & sales exps                                                                                     |                                                                                            | 74,801                                                                                   |                      |                                                    |                                         |                                                                           |
| <b>c</b> Gain or (loss)                                                                                                               |                                                                                            | 24,722                                                                                   |                      |                                                    |                                         |                                                                           |
| <b>d</b> Net gain or (loss)                                                                                                           |                                                                                            |                                                                                          | 24,722               |                                                    |                                         | 24,722                                                                    |
| <b>8a</b> Gross income from fundraising events<br>(not including \$<br>of contributions reported on line 1c).<br>See Part IV, line 18 |                                                                                            | a                                                                                        |                      |                                                    |                                         |                                                                           |
| <b>b</b> Less: direct expenses                                                                                                        |                                                                                            | b                                                                                        |                      |                                                    |                                         |                                                                           |
| <b>c</b> Net income or (loss) from fundraising events                                                                                 |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>9a</b> Gross income from gaming activities<br>See Part IV, line 19                                                                 |                                                                                            | a                                                                                        |                      |                                                    |                                         |                                                                           |
| <b>b</b> Less: direct expenses                                                                                                        |                                                                                            | b                                                                                        |                      |                                                    |                                         |                                                                           |
| <b>c</b> Net income or (loss) from gaming activities                                                                                  |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>10a</b> Gross sales of inventory, less<br>returns and allowances                                                                   |                                                                                            | a 738,023                                                                                |                      |                                                    |                                         |                                                                           |
| <b>b</b> Less: cost of goods sold                                                                                                     | b 378,754                                                                                  |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>c</b> Net income or (loss) from sales of inventory                                                                                 |                                                                                            | 359,269                                                                                  | 359,269              |                                                    |                                         |                                                                           |
| <b>Miscellaneous Revenue</b>                                                                                                          |                                                                                            | <b>Busn. Code</b>                                                                        |                      |                                                    |                                         |                                                                           |
| <b>11a</b> MAGAZINES                                                                                                                  | 900099                                                                                     | 2,708                                                                                    |                      |                                                    | 2,708                                   |                                                                           |
| <b>b</b>                                                                                                                              |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>c</b>                                                                                                                              |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>d</b> All other revenue                                                                                                            |                                                                                            |                                                                                          |                      |                                                    |                                         |                                                                           |
| <b>e Total.</b> Add lines 11a-11d                                                                                                     |                                                                                            | 2,708                                                                                    |                      |                                                    |                                         |                                                                           |
| <b>12 Total Revenue.</b> See instructions                                                                                             |                                                                                            | 3,529,929                                                                                | 1,486,765            | 13,103                                             | 146,881                                 |                                                                           |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.                                                                                                                                              | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| 1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21                                                                                                                             |                       |                                 |                                        |                             |
| 2 Grants and other assistance to individuals in the U.S. See Part IV, line 22                                                                                                                                               |                       |                                 |                                        |                             |
| 3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16                                                                                                  |                       |                                 |                                        |                             |
| 4 Benefits paid to or for members                                                                                                                                                                                           |                       |                                 |                                        |                             |
| 5 Compensation of current officers, directors, trustees, and key employees                                                                                                                                                  | 92,074                |                                 |                                        |                             |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)                                                                             |                       |                                 |                                        |                             |
| 7 Other salaries and wages                                                                                                                                                                                                  | 990,001               |                                 |                                        |                             |
| 8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)                                                                                                                             | 4,130                 |                                 |                                        |                             |
| 9 Other employee benefits                                                                                                                                                                                                   | 122,204               |                                 |                                        |                             |
| 10 Payroll taxes                                                                                                                                                                                                            | 89,143                |                                 |                                        |                             |
| 11 Fees for services (non-employees):                                                                                                                                                                                       |                       |                                 |                                        |                             |
| a Management                                                                                                                                                                                                                |                       |                                 |                                        |                             |
| b Legal                                                                                                                                                                                                                     | 32,979                |                                 |                                        |                             |
| c Accounting                                                                                                                                                                                                                | 27,055                |                                 |                                        |                             |
| d Lobbying                                                                                                                                                                                                                  |                       |                                 |                                        |                             |
| e Professional fundraising services. See Part IV, line 17                                                                                                                                                                   |                       |                                 |                                        |                             |
| f Investment management fees                                                                                                                                                                                                | 6,237                 |                                 |                                        |                             |
| g Other                                                                                                                                                                                                                     | 3,000                 |                                 |                                        |                             |
| 12 Advertising and promotion                                                                                                                                                                                                | 1,226                 |                                 |                                        |                             |
| 13 Office expenses                                                                                                                                                                                                          | 70,410                |                                 |                                        |                             |
| 14 Information technology                                                                                                                                                                                                   | 53,858                |                                 |                                        |                             |
| 15 Royalties                                                                                                                                                                                                                |                       |                                 |                                        |                             |
| 16 Occupancy                                                                                                                                                                                                                | 352,799               |                                 |                                        |                             |
| 17 Travel                                                                                                                                                                                                                   | 32,798                |                                 |                                        |                             |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials                                                                                                                           |                       |                                 |                                        |                             |
| 19 Conferences, conventions, and meetings                                                                                                                                                                                   | 245,523               |                                 |                                        |                             |
| 20 Interest                                                                                                                                                                                                                 |                       |                                 |                                        |                             |
| 21 Payments to affiliates                                                                                                                                                                                                   |                       |                                 |                                        |                             |
| 22 Depreciation, depletion, and amortization                                                                                                                                                                                | 132,115               |                                 |                                        |                             |
| 23 Insurance                                                                                                                                                                                                                | 438,053               |                                 |                                        |                             |
| 24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)                                                    |                       |                                 |                                        |                             |
| a PRINTING AND PUBLICATIONS                                                                                                                                                                                                 | 135,594               |                                 |                                        |                             |
| b NETWORKS & COMMITTEES                                                                                                                                                                                                     | 106,550               |                                 |                                        |                             |
| c NEW COLONY EXPENSES                                                                                                                                                                                                       | 50,536                |                                 |                                        |                             |
| d CHAPTER ASSISTANCE & SERV                                                                                                                                                                                                 | 43,346                |                                 |                                        |                             |
| e LIFE LOYAL EXPENSES                                                                                                                                                                                                       | 39,526                |                                 |                                        |                             |
| f All other expenses                                                                                                                                                                                                        | 107,738               |                                 |                                        |                             |
| 25 Total functional expenses. Add lines 1 through 24f                                                                                                                                                                       | 3,176,895             |                                 |                                        |                             |
| 26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation |                       |                                 |                                        |                             |

**Part X Balance Sheet**

|                                                                     |                                                                                                                                                                         | (A)<br>Beginning of year |               | (B)<br>End of year |
|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|---------------|--------------------|
| <b>Assets</b>                                                       | 1 Cash—non-interest bearing                                                                                                                                             |                          | 1             |                    |
|                                                                     | 2 Savings and temporary cash investments                                                                                                                                | 1,452,667                | 2             | 1,525,712          |
|                                                                     | 3 Pledges and grants receivable, net                                                                                                                                    |                          | 3             |                    |
|                                                                     | 4 Accounts receivable, net                                                                                                                                              |                          | 4             |                    |
|                                                                     | 5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L                   |                          | 5             |                    |
|                                                                     | 6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L      |                          | 6             |                    |
|                                                                     | 7 Notes and loans receivable, net                                                                                                                                       |                          | 7             |                    |
|                                                                     | 8 Inventories for sale or use                                                                                                                                           | 182,906                  | 8             | 130,252            |
|                                                                     | 9 Prepaid expenses and deferred charges                                                                                                                                 | 9,307                    | 9             | 26,020             |
|                                                                     | 10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D                                                                                 | 10a 5,723,563            |               |                    |
|                                                                     | b Less: accumulated depreciation                                                                                                                                        | 10b 2,000,175            | 10c 3,723,388 |                    |
|                                                                     | 11 Investments—publicly traded securities                                                                                                                               | 853,829                  | 11            | 993,658            |
|                                                                     | 12 Investments—other securities. See Part IV, line 11                                                                                                                   |                          | 12            |                    |
|                                                                     | 13 Investments—program-related. See Part IV, line 11                                                                                                                    | 11,591,457               | 13            | 11,580,972         |
|                                                                     | 14 Intangible assets                                                                                                                                                    |                          | 14            |                    |
|                                                                     | 15 Other assets. See Part IV, line 11                                                                                                                                   | 127,090                  | 15            | 243,933            |
| 16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) | 18,018,708                                                                                                                                                              | 16                       | 18,223,935    |                    |
| <b>Liabilities</b>                                                  | 17 Accounts payable and accrued expenses                                                                                                                                | 671,643                  | 17            | 475,911            |
|                                                                     | 18 Grants payable                                                                                                                                                       |                          | 18            |                    |
|                                                                     | 19 Deferred revenue                                                                                                                                                     |                          | 19            |                    |
|                                                                     | 20 Tax-exempt bond liabilities                                                                                                                                          |                          | 20            |                    |
|                                                                     | 21 Escrow or custodial account liability. Complete Part IV of Schedule D                                                                                                |                          | 21            |                    |
|                                                                     | 22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L |                          | 22            |                    |
|                                                                     | 23 Secured mortgages and notes payable to unrelated third parties                                                                                                       | 2,934,511                | 23            | 2,821,049          |
|                                                                     | 24 Unsecured notes and loans payable to unrelated third parties                                                                                                         |                          | 24            |                    |
|                                                                     | 25 Other liabilities. Complete Part X of Schedule D                                                                                                                     | 420,251                  | 25            | 668,732            |
|                                                                     | 26 <b>Total liabilities.</b> Add lines 17 through 25                                                                                                                    | 4,026,405                | 26            | 3,965,692          |
| <b>Net Assets or Fund Balances</b>                                  | Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.                               |                          |               |                    |
|                                                                     | 27 Unrestricted net assets                                                                                                                                              | 13,772,528               | 27            | 14,235,370         |
|                                                                     | 28 Temporarily restricted net assets                                                                                                                                    | 219,775                  | 28            | 22,873             |
|                                                                     | 29 Permanently restricted net assets                                                                                                                                    |                          | 29            |                    |
|                                                                     | Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.                                                        |                          |               |                    |
|                                                                     | 30 Capital stock or trust principal, or current funds                                                                                                                   |                          | 30            |                    |
|                                                                     | 31 Paid-in or capital surplus, or land, building, or equipment fund                                                                                                     |                          | 31            |                    |
|                                                                     | 32 Retained earnings, endowment, accumulated income, or other funds                                                                                                     |                          | 32            |                    |
|                                                                     | 33 <b>Total net assets or fund balances</b>                                                                                                                             | 13,992,303               | 33            | 14,258,243         |
| 34 <b>Total liabilities and net assets/fund balances</b>            | 18,018,708                                                                                                                                                              | 34                       | 18,223,935    |                    |

**Part XI** Financial Statements and Reporting

**1** Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other \_\_\_\_\_

If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.

**2a** Were the organization's financial statements compiled or reviewed by an independent accountant? ...

**b** Were the organization's financial statements audited by an independent accountant? ...

**c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? ...

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.

**d** If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both:

☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis

**3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? ...

**b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

|           | Yes      | No       |
|-----------|----------|----------|
|           |          |          |
| <b>2a</b> |          | <b>X</b> |
| <b>2b</b> | <b>X</b> |          |
| <b>2c</b> | <b>X</b> |          |
|           |          |          |
| <b>3a</b> |          | <b>X</b> |
| <b>3b</b> |          |          |

Form **990** (2009)

**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ Complete if the organization answered "Yes," to Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11, or 12.

▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

**2009**

Open to Public  
Inspection

Name of the organization

Employer identification number

**ALPHA OMICRON PI FRATERNITY, INC.**

**62-0950113**

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

|                                                                                                                                                                                                                                                                       | (a) Donor advised funds | (b) Funds and other accounts                             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|----------------------------------------------------------|
| 1 Total number at end of year                                                                                                                                                                                                                                         |                         |                                                          |
| 2 Aggregate contributions to (during year)                                                                                                                                                                                                                            |                         |                                                          |
| 3 Aggregate grants from (during year)                                                                                                                                                                                                                                 |                         |                                                          |
| 4 Aggregate value at end of year                                                                                                                                                                                                                                      |                         |                                                          |
| 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?                                                            |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? |                         | <input type="checkbox"/> Yes <input type="checkbox"/> No |

**Part II Conservation Easements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

|                                                                                             |                                                                              |
|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> Preservation of land for public use (e.g., recreation or pleasure) | <input type="checkbox"/> Preservation of an historically important land area |
| <input type="checkbox"/> Protection of natural habitat                                      | <input type="checkbox"/> Preservation of certified historic structure        |
| <input type="checkbox"/> Preservation of open space                                         |                                                                              |

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

|                                                                                      | Held at the End of the Tax Year |
|--------------------------------------------------------------------------------------|---------------------------------|
| a Total number of conservation easements                                             | 2a                              |
| b Total acreage restricted by conservation easements                                 | 2b                              |
| c Number of conservation easements on a certified historic structure included in (a) | 2c                              |
| d Number of conservation easements included in (c) acquired after 8/17/06            | 2d                              |

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$

(ii) Assets included in Form 990, Part X ▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 ▶ \$

b Assets included in Form 990, Part X ▶ \$

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition  
 b ☐ Scholarly research  
 c ☐ Preservation for future generations  
 d ☐ Loan or exchange programs  
 e ☐ Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.**

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

- c Beginning balance  
 d Additions during the year  
 e Distributions during the year  
 f Ending balance

|    | Amount |
|----|--------|
| 1c |        |
| 1d |        |
| 1e |        |
| 1f |        |

2a Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV.

**Part V Endowment Funds. Complete if organization answered "Yes" to Form 990, Part IV, line 10.**

|                                                  | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--------------------------------------------------|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance                     |                  |                |                    |                      |                     |
| b Contributions                                  |                  |                |                    |                      |                     |
| c Net investment earnings, gains, and losses     |                  |                |                    |                      |                     |
| d Grants or scholarships                         |                  |                |                    |                      |                     |
| e Other expenditures for facilities and programs |                  |                |                    |                      |                     |
| f Administrative expenses                        |                  |                |                    |                      |                     |
| g End of year balance                            |                  |                |                    |                      |                     |

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ▶ \_\_\_\_\_ %  
 b Permanent endowment ▶ \_\_\_\_\_ %  
 c Term endowment ▶ \_\_\_\_\_ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i) unrelated organizations  
 (ii) related organizations

|        | Yes | No |
|--------|-----|----|
| 3a(i)  |     |    |
| 3a(ii) |     |    |
| 3b     |     |    |

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIV the intended uses of the organization's endowment funds.

**Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.**

| Description of investment                                                                         | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---------------------------------------------------------------------------------------------------|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land                                                                                           |                                      | 789,753                         |                              | 789,753        |
| b Buildings                                                                                       |                                      | 3,760,119                       | 1,040,977                    | 2,719,142      |
| c Leasehold improvements                                                                          |                                      |                                 |                              |                |
| d Equipment                                                                                       |                                      | 1,173,691                       | 959,198                      | 214,493        |
| e Other                                                                                           |                                      |                                 |                              |                |
| Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) |                                      |                                 |                              | 3,723,388      |

**Part VII Investments—Other Securities.** See Form 990, Part X, line 12.

| (a) Description of security or category<br>(including name of security)   | (b) Book value | (c) Method of valuation<br>Cost or end-of-year market value |
|---------------------------------------------------------------------------|----------------|-------------------------------------------------------------|
| Financial derivatives                                                     |                |                                                             |
| Closely-held equity interests                                             |                |                                                             |
| Other                                                                     |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
|                                                                           |                |                                                             |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) |                |                                                             |

**Part VIII Investments—Program Related.** See Form 990, Part X, line 13.

| (a) Description of investment type                                                                                  | (b) Book value | (c) Method of valuation<br>Cost or end-of-year market value |
|---------------------------------------------------------------------------------------------------------------------|----------------|-------------------------------------------------------------|
| INVESTMENT IN ALPHA OMICRON PI PROPERTIES, INC., AN EXEMPT 100% OWNED SUBSIDIARY ACCOUNTED FOR BY THE EQUITY METHOD | 11,580,972     | EQUITY                                                      |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
|                                                                                                                     |                |                                                             |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.)                                           | 11,580,972     |                                                             |

**Part IX Other Assets.** See Form 990, Part X, line 15.

| (a) Description                                                           | (b) Book value |
|---------------------------------------------------------------------------|----------------|
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
|                                                                           |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) |                |

**Part X Other Liabilities.** See Form 990, Part X, line 25.

| 1. (a) Description of liability                                           | (b) Amount |
|---------------------------------------------------------------------------|------------|
| Federal income taxes                                                      |            |
| INTEREST RATE SWAP                                                        | 390,397    |
| DEFERRED INCOME                                                           | 251,310    |
| JEWELRY RESERVE                                                           | 27,025     |
|                                                                           |            |
|                                                                           |            |
|                                                                           |            |
|                                                                           |            |
|                                                                           |            |
|                                                                           |            |
|                                                                           |            |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) | 668,732    |

2. FIN 48 Footnote. In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

**Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements**

|    |                                                                                          |    |           |
|----|------------------------------------------------------------------------------------------|----|-----------|
| 1  | Total revenue (Form 990, Part VIII, column (A), line 12)                                 | 1  | 3,529,929 |
| 2  | Total expenses (Form 990, Part IX, column (A), line 25)                                  | 2  | 3,176,895 |
| 3  | Excess or (deficit) for the year. Subtract line 2 from line 1                            | 3  | 353,034   |
| 4  | Net unrealized gains (losses) on investments                                             | 4  | 60,169    |
| 5  | Donated services and use of facilities                                                   | 5  |           |
| 6  | Investment expenses                                                                      | 6  |           |
| 7  | Prior period adjustments                                                                 | 7  |           |
| 8  | Other (Describe in Part XIV.)                                                            | 8  | -147,264  |
| 9  | Total adjustments (net). Add lines 4 through 8                                           | 9  | -87,095   |
| 10 | Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9 | 10 | 265,939   |

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

|   |                                                                                |    |           |
|---|--------------------------------------------------------------------------------|----|-----------|
| 1 | Total revenue, gains, and other support per audited financial statements       | 1  | 3,543,806 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12:            |    |           |
| a | Net unrealized gains on investments                                            | 2a | 60,169    |
| b | Donated services and use of facilities                                         | 2b |           |
| c | Recoveries of prior year grants                                                | 2c |           |
| d | Other (Describe in Part XIV.)                                                  | 2d | -39,565   |
| e | Add lines 2a through 2d                                                        | 2e | 20,604    |
| 3 | Subtract line 2e from line 1                                                   | 3  | 3,523,202 |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1:           |    |           |
| a | Investment expenses not included on Form 990, Part VIII, line 7b               | 4a | 6,237     |
| b | Other (Describe in Part XIV.)                                                  | 4b | 490       |
| c | Add lines 4a and 4b                                                            | 4c | 6,727     |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12) | 5  | 3,529,929 |

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

|   |                                                                                 |    |           |
|---|---------------------------------------------------------------------------------|----|-----------|
| 1 | Total expenses and losses per audited financial statements                      | 1  | 3,277,867 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25:               |    |           |
| a | Donated services and use of facilities                                          | 2a |           |
| b | Prior year adjustments                                                          | 2b |           |
| c | Other losses                                                                    | 2c |           |
| d | Other (Describe in Part XIV.)                                                   | 2d | 107,698   |
| e | Add lines 2a through 2d                                                         | 2e | 107,698   |
| 3 | Subtract line 2e from line 1                                                    | 3  | 3,170,169 |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1:              |    |           |
| a | Investment expenses not included on Form 990, Part VIII, line 7b                | 4a | 6,237     |
| b | Other (Describe in Part XIV.)                                                   | 4b | 489       |
| c | Add lines 4a and 4b                                                             | 4c | 6,726     |
| 5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18) | 5  | 3,176,895 |

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART X - LIABILITY UNDER FIN 48 FOOTNOTE**

THE FRATERNITY RECOGNIZES THE TAX BENEFITS OF UNCERTAIN TAX POSITIONS ONLY WHERE THE POSITION IS "MORE LIKELY THAN NOT" TO BE SUSTAINED ASSUMING EXAMINATION BY TAX AUTHORITIES. MANAGEMENT HAS ANALYZED THE FRATERNITY'S TAX POSITIONS AND HAS CONCLUDED THAT NO LIABILITY FOR UNRECOGNIZED TAX BENEFITS SHOULD BE RECORDED RELATED TO UNCERTAIN TAX POSITIONS TAKEN ON RETURNS FILED FOR THE OPEN TAX YEARS (YEARS ENDED JUNE 30, 2007, 2008, AND

**Part XIV** Supplemental Information (continued)

2009), OR EXPECTED TO BE TAKEN IN THE FRATERNITY'S TAX RETURN FOR THE YEAR ENDED JUNE 30, 2010. THE FRATERNITY IDENTIFIES ITS MAJOR TAX JURISDICTIONS AS THE U.S. FEDERAL AND THE STATE OF TENNESSEE. HOWEVER, THE FRATERNITY IS NOT CURRENTLY UNDER AUDIT NOR HAS THE FRATERNITY BEEN CONTACTED BY ANY OF THESE JURISDICTIONS. THE FRATERNITY IS NOT AWARE OF ANY TAX POSITIONS FOR WHICH IT IS REASONABLY POSSIBLE THAT THE TOTAL AMOUNTS OF UNRECOGNIZED TAX BENEFITS WILL CHANGE IN THE NEXT TWELVE MONTHS.

DURING THE YEAR ENDED JUNE 30, 2010, THE FRATERNITY DID NOT RECOGNIZE ANY INTEREST AND PENALTIES RELATING TO TAXES, NOR WERE ANY ACCRUED AT JUNE 30, 2010.

**PART XI, LINE 8 - RECONCILIATION OF CHANGES - OTHER**

|                                                          |    |          |
|----------------------------------------------------------|----|----------|
| COST OF GOODS SOLD - LINE 10B                            | \$ | 378,754  |
| PROPERTY INSURANCE                                       | \$ | -271,056 |
| LOSS ON FAIR VALUE OF INTEREST SWAP                      | \$ | -136,780 |
| LOSS FROM ALPHA OMICRON PI PROPERTIES, INC. AN EXEMPT    | \$ | 0        |
| 100% OWNED SUBSIDIARY ACCOUNTED FOR BY THE EQUITY METHOD | \$ | -10,483  |
| GAIN ON FOREIGN EXCHANGE                                 | \$ | -490     |
| PROPERTY INSURANCE                                       | \$ | 271,056  |
| COST OF GOODS SOLD - LINE 10B                            | \$ | -378,754 |
| GAIN ON FOREIGN EXCHANGE                                 | \$ | 490      |
| ROUNDING                                                 | \$ | -1       |

**PART XII, LINE 2D - REVENUE AMOUNTS INCLUDED IN FINANCIALS - OTHER**

|                               |    |          |
|-------------------------------|----|----------|
| COST OF GOODS SOLD - LINE 10B | \$ | 378,754  |
| PROPERTY INSURANCE            | \$ | -271,056 |

**Part XIV** Supplemental Information (continued)

LOSS ON FAIR VALUE OF INTEREST SWAP \$ -136,780

LOSS FROM ALPHA OMICRON PI PROPERTIES, INC. AN EXEMPT \$ 0

100% OWNED SUBSIDIARY ACCOUNTED FOR BY THE EQUITY METHOD \$ -10,483

PART XII, LINE 4B - REVENUE AMOUNTS INCLUDED ON RETURN - OTHER

GAIN ON FOREIGN EXCHANGE \$ 490

PART XIII, LINE 2D - EXPENSE AMOUNTS INCLUDED IN FINANCIALS - OTHER

PROPERTY INSURANCE \$ -271,056

COST OF GOODS SOLD - LINE 10B \$ 378,754

PART XIII, LINE 4B - EXPENSE AMOUNTS INCLUDED ON RETURN - OTHER

GAIN ON FOREIGN EXCHANGE \$ 490

ROUNDING \$ -1

**SCHEDULE L**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Transactions With Interested Persons**

▶ **Complete if the organization answered**  
"Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c,  
or Form 990-EZ, Part V, line 38a or 40b.  
▶ **Attach to Form 990 or Form 990-EZ.** ▶ **See separate instructions.**

OMB No 1545-0047

**2009**

Open To Public  
Inspection

Name of the organization

**ALPHA OMICRON PI FRATERNITY, INC.**

Employer identification number

**62-0950113**

**Part I Excess Benefit Transactions** (section 501(c)(3) and section 501(c)(4) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

| 1 | (a) Name of disqualified person | (b) Description of transaction | (c) Corrected? |    |
|---|---------------------------------|--------------------------------|----------------|----|
|   |                                 |                                | Yes            | No |
|   |                                 |                                |                |    |
|   |                                 |                                |                |    |
|   |                                 |                                |                |    |
|   |                                 |                                |                |    |
|   |                                 |                                |                |    |
|   |                                 |                                |                |    |

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$

**Part II Loans to and/or From Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a.

| (a) Name of interested person and purpose | (b) Loan to or from the organization? |      | (c) Original principal amount | (d) Balance due | (e) In default? |    | (f) Approved by board or committee? |    | (g) Written agreement? |    |
|-------------------------------------------|---------------------------------------|------|-------------------------------|-----------------|-----------------|----|-------------------------------------|----|------------------------|----|
|                                           | To                                    | From |                               |                 | Yes             | No | Yes                                 | No | Yes                    | No |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                                           |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| Total ▶ \$                                |                                       |      |                               |                 |                 |    |                                     |    |                        |    |

**Part III Grants or Assistance Benefitting Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount and type of assistance |
|-------------------------------|-----------------------------------------------------------------|-----------------------------------|
|                               |                                                                 |                                   |
|                               |                                                                 |                                   |
|                               |                                                                 |                                   |
|                               |                                                                 |                                   |
|                               |                                                                 |                                   |
|                               |                                                                 |                                   |

**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sharing of org revenues? |    |
|-------------------------------|-----------------------------------------------------------------|---------------------------|--------------------------------|------------------------------|----|
|                               |                                                                 |                           |                                | Yes                          | No |
| BARB ZIPPERIAN                | PRESIDENT                                                       | 450,000                   | CD WITH AVENUE BANK            |                              | X  |
|                               |                                                                 |                           |                                |                              |    |
|                               |                                                                 |                           |                                |                              |    |
|                               |                                                                 |                           |                                |                              |    |
|                               |                                                                 |                           |                                |                              |    |

**SCHEDULE O**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

Complete to provide information for responses to specific questions on  
Form 990 or to provide any additional information.  
▶ Attach to Form 990.

OMB No 1545-0047

**2009**

Open to Public  
Inspection

Name of the organization

**ALPHA OMICRON PI FRATERNITY, INC.**

Employer identification number  
**62-0950113**

**FORM 990, PART V, LINE 4B - FINANCIAL ACCOUNTS IN FOREIGN COUNTRIES**

**CANADA**

**FORM 990, PART VI, LINE 6 - CLASSES OF MEMBERS OR STOCKHOLDERS**

**THE MEMBERS HAVE THE RIGHT TO VOTE ON LAW CHANGES. THEY ELECT THE BOARD OF  
DIRECTORS.**

**FORM 990, PART VI, LINE 7A - ELECTION OF MEMBERS AND THEIR RIGHTS**

**THE MEMBERS ELECT THE BOARD OF DIRECTORS.**

**FORM 990, PART VI, LINE 7B - DECISIONS SUBJECT TO APPROVAL OF MEMBERS**

**THE BY-LAWS ARE VOTED ON BY THE COUNCIL.**

**FORM 990, PART VI, LINE 10B - POLICIES AND PROCEDURES GOVERNING CHAPTERS**

**THE FRATERNITY HAS WRITTEN POLICIES AND PROCEDURES THAT GOVERN THE  
ACTIVITIES OF THE CHAPTERS TO ENSURE THEIR OPERATIONS ARE CONSISTENT WITH  
THE FRATERNITY'S.**

**FORM 990, PART VI, LINE 11A - ORGANIZATION'S PROCESS TO REVIEW FORM 990**

**PRIOR TO SUBMITTING AOPF FRATERNITY, INC IRS FORM 990, THE ORGANIZATION'S  
CONTROLLER FORWARDED A COPY OF THE FORM TO EACH BOARD MEMBER FOR THEIR  
REVIEW. BOARD MEMBERS ARE ENCOURAGED TO CONTACT THE CONTROLLER WITH ANY  
QUESTIONS THEY MAY HAVE CONCERNING INFORMATION PRESENTED WITHIN THE FORM  
AND ATTACHED SCHEDULES.**

Name of the organization

ALPHA OMICRON PI FRATERNITY, INC.

Employer identification number

62-0950113

FORM 990, PART VI, LINE 12C - ENFORCEMENT OF CONFLICTS POLICY

EMPLOYEES WILL SIGN THE WRITTEN CONFLICT OF INTEREST POLICY AT THE DATE OF EMPLOYMENT, AND REVISIT THE POLICY AT EACH ANNUAL REVIEW. BOARD MEMBERS WILL SIGN AT THE FIRST BOARD MEETING AFTER THE ELECTION.

FORM 990, PART VI, LINE 15A - COMPENSATION PROCESS FOR TOP OFFICIAL

THE EXECUTIVE BOARD REVIEWS THE EXECUTIVE DIRECTOR'S PERFORMANCE AND VOTES ON COMPENSATION ACCORDINGLY. THE EXECUTIVE BOARD USES DATA OF COMPARABLE COMPENSATION FOR SIMILARLY QUALIFIED PERSONS IN FUNCTIONALLY COMPARABLE POSITIONS AT SIMILARLY SITUATED ORGANIZATIONS. THE CONTROLLER IS SENT A LETTER DETAILING ANY SALARY OR BENEFIT CHANGES BY THE EXECUTIVE BOARD.

FORM 990, PART VI, LINE 19 - GOVERNING DOCUMENTS DISCLOSURE EXPLANATION

THE GOVERNING DOCUMENTS ARE AVAILABLE ONLY TO ALPHA OMICRON PI MEMBERS ON A PRIVATE WEBSITE. THE FINANCIAL STATEMENTS ARE ALSO ONLY AVAILABLE TO ALPHA OMICRON PI MEMBERS VIA EMAIL.

OMB No 1545-0047

► Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.

2009

**Open to Public  
Inspection**

**ALPHA OMICRON PI FRATERNITY, INC.**

**Employer identification number**  
**62-0950113**

**Part I Identification of Disregarded Entities** (Complete if the organization answered "Yes" to Form 990, Part IV, line 33.)

| (a)<br>Name, address, and EIN of disregarded entity | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Total income | (e)<br>End-of-year assets | (f)<br>Direct controlling entity |
|-----------------------------------------------------|-------------------------|--------------------------------------------------|---------------------|---------------------------|----------------------------------|
| .. . . .                                            |                         |                                                  |                     |                           |                                  |
|                                                     |                         |                                                  |                     |                           |                                  |
| . . . . .                                           |                         |                                                  |                     |                           |                                  |
|                                                     |                         |                                                  |                     |                           |                                  |
| . . . . .                                           |                         |                                                  |                     |                           |                                  |
|                                                     |                         |                                                  |                     |                           |                                  |
| . . . . .                                           |                         |                                                  |                     |                           |                                  |
|                                                     |                         |                                                  |                     |                           |                                  |

| Part II | Identification of Related Tax-Exempt Organizations (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.) |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|         |                                                                                                                                                                                                                 |

| (a)<br>Name, address, and EIN of related organization | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Exempt Code section | (e)<br>Public charity status (if section 501(c)(3)) | (f)<br>Direct controlling entity |
|-------------------------------------------------------|-------------------------|--------------------------------------------------|----------------------------|-----------------------------------------------------|----------------------------------|
| <b>A</b>                                              |                         |                                                  |                            |                                                     |                                  |
|                                                       |                         |                                                  |                            |                                                     | <b>N/A</b>                       |
|                                                       |                         |                                                  |                            |                                                     |                                  |
|                                                       |                         |                                                  |                            |                                                     |                                  |
|                                                       |                         |                                                  |                            |                                                     |                                  |
|                                                       |                         |                                                  |                            |                                                     |                                  |
|                                                       |                         |                                                  |                            |                                                     |                                  |
|                                                       |                         |                                                  |                            |                                                     |                                  |

**Part III Identification of Related Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

| (a)<br>Name, address, and EIN of<br>related organization | (b)<br>Primary activity | (c)<br>Legal<br>domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Predominant<br>income (related,<br>unrelated,<br>excluded from<br>tax under<br>sections<br>512-514) | (f)<br>Share of total income | (g)<br>Share of end-of-year<br>assets | (h)<br>Dispro-<br>portionate<br>alloc.? <span style="float:right">Yes No</span> |  | (i)<br>Code V—UBI<br>amount in box 20 of<br>Schedule K-1<br>(Form 1065) | (j)<br>General or<br>managing<br>partner? |
|----------------------------------------------------------|-------------------------|--------------------------------------------------------------|-------------------------------------|------------------------------------------------------------------------------------------------------------|------------------------------|---------------------------------------|---------------------------------------------------------------------------------|--|-------------------------------------------------------------------------|-------------------------------------------|
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |
|                                                          |                         |                                                              |                                     |                                                                                                            |                              |                                       |                                                                                 |  |                                                                         |                                           |

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

| (a)<br>Name, address, and EIN of related organization | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or<br>foreign country) | (d)<br>Direct controlling<br>entity | (e)<br>Type of entity<br>(C corp, S corp,<br>or trust) | (f)<br>Share of total income | (g)<br>Share of<br>end-of-year assets | (h)<br>Percentage<br>ownership |
|-------------------------------------------------------|-------------------------|--------------------------------------------------------|-------------------------------------|--------------------------------------------------------|------------------------------|---------------------------------------|--------------------------------|
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |
|                                                       |                         |                                                        |                                     |                                                        |                              |                                       |                                |

**Part V Transactions With Related Organizations** (Complete if the organization answered "Yes" to Form 990, Part IV, line 34, 35, or 36.)**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?**a** Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity**b** Gift, grant, or capital contribution to other organization(s)**c** Gift, grant, or capital contribution from other organization(s)**d** Loans or loan guarantees to or for other organization(s)**e** Loans or loan guarantees by other organization(s)**f** Sale of assets to other organization(s)**g** Purchase of assets from other organization(s)**h** Exchange of assets**i** Lease of facilities, equipment, or other assets to other organization(s)**j** Lease of facilities, equipment, or other assets from other organization(s)**k** Performance of services or membership or fundraising solicitations for other organization(s)**l** Performance of services or membership or fundraising solicitations by other organization(s)**m** Sharing of facilities, equipment, mailing lists, or other assets**n** Sharing of paid employees**o** Reimbursement paid to other organization for expenses**p** Reimbursement paid by other organization for expenses**q** Other transfer of cash or property to other organization(s)**r** Other transfer of cash or property from other organization(s)**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

|     | (a)<br>Name of other organization | (b)<br>Transaction type (a-r) | (c)<br>Amount involved |
|-----|-----------------------------------|-------------------------------|------------------------|
| (1) | ALPHA OMICRON PI PROPERTIES, INC. | A                             | 38,879                 |
| (2) | ALPHA OMICRON PI PROPERTIES, INC. | C                             | 70,829                 |
| (3) | ALPHA OMICRON PI PROPERTIES, INC. | N                             | 95,473                 |
| (4) | ALPHA OMICRON PI PROPERTIES, INC. | K                             | 147,864                |
| (5) |                                   |                               |                        |
| (6) |                                   |                               |                        |

Schedule R (Form 990) 2009

