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# Short Form Return of Organization Exempt From Income Tax

OMB No 1545-1150

2009

Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

► Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form

► The organization may have to use a copy of this return to satisfy state reporting requirements

**A For the 2009 calendar year, or tax year beginning** 7/01 **, 2009, and ending** 6/30 **, 2010**

**B Check if applicable**

- Address change
- Name change
- Initial return
- Termination
- Amended return
- Application pending

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

**C**  
ROTARY INTERNATIONAL  
STOCKTON SUNRISE ROTARY  
P O BOX 7501  
STOCKTON, CA 95207

**D Employer identification number**

68-0005739

**E Telephone number**

**F Group Exemption Number**

► 0573

• **Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).**

**G Accounting method**  Cash  Accrual  
Other (specify) ►

**I Website:** ► N/A

**J Tax-exempt status (check only one)** —  501(c) (4) (insert no.) 4947(a)(1) or 527

**K** Check ►  if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return

**L** Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$500,000 or more, file Form 990 instead of Form 990-EZ

► \$ 69,482.

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

<b>REVENUE</b> 1 Contributions, gifts, grants, and similar amounts received 2 Program service revenue including government fees and contracts 3 Membership dues and assessments 4 Investment income 5a Gross amount from sale of assets other than inventory b Less cost or other basis and sales expenses c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) 6 Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ► <input type="checkbox"/> a Gross revenue (not including \$ _____ of contributions reported on line 1) b Less direct expenses other than fundraising expenses c Net income or (loss) from special events and activities (Subtract line 6b from line 6a) 7a Gross sales of inventory, less returns and allowances b Less cost of goods sold c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) 8 Other revenue (describe ► ) <b>9 Total revenue</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	1 2 3 7,537. 4 2,707.  5a 5b  5c  6a 59,238. 6b 32,524.  6c 26,714.  7a 7b  7c  8  9 36,958.
	See Statement 1
	10 Grants and similar amounts paid (attach schedule)
	11 Benefits paid to or for members
	12 Salaries, other compensation, and employee benefits
	13 Professional fees and other payments to independent contractors
	14 Occupancy, rent, utilities, and maintenance
	15 Printing, publications, postage, and shipping
	16 Other expenses (describe ► See Statement 12 )
<b>EXPENSES</b> 10 Grants and similar amounts paid (attach schedule) 11 Benefits paid to or for members 12 Salaries, other compensation, and employee benefits 13 Professional fees and other payments to independent contractors 14 Occupancy, rent, utilities, and maintenance 15 Printing, publications, postage, and shipping 16 Other expenses (describe ► See Statement 12 ) <b>17 Total expenses</b> Add lines 10 through 16	10 32,444. 11 12 13 14 15 16 13,972. 17 46,416.  18 -9,458.  19 146,039.  20  21 136,581.
	18 Excess or (deficit) for the year (Subtract line 17 from line 9)
	19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)
	20 Other changes in net assets or fund balances (attach explanation)
	21 Net assets or fund balances at end of year Combine lines 18 through 20
	► 21 136,581.
	► 21 136,581.
	► 21 136,581.
	► 21 136,581.
	► 21 136,581.
	► 21 136,581.

**Part II Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ

(See the instructions for Part II )

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	146,039.	22 136,581.
23 Land and buildings		23
24 Other assets (describe ► )		24
<b>25 Total assets</b>	146,039.	25 136,581.
<b>26 Total liabilities (describe ► )</b>	0.	26 0.
<b>27 Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	146,039.	27 136,581.

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



## Part V Other Information (Note the statement requirements in the instrs for Part V.)

33 Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed description of each activity 33  X

34 Were any changes made to the organizing or governing documents? If 'Yes,' attach a conformed copy of the changes 34  X

35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T. 35a  X

a Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements? 35b  X

b If 'Yes,' has it filed a tax return on **Form 990-T** for this year? 36  X

36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If 'Yes,' complete applicable parts of Schedule N 37a  0.

37a Enter amount of political expenditures, direct or indirect, as described in the instructions 37b  X

b Did the organization file **Form 1120-POL** for this year? 38a  X

38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee **or** were any such loans made in a prior year and still outstanding at the end of the period covered by this return? 38b  N/A

b If 'Yes,' complete Schedule L, Part II and enter the total amount involved 39a  N/A

39 Section 501(c)(7) organizations. Enter 39b  N/A

a Initiation fees and capital contributions included on line 9 39b  N/A

b Gross receipts, included on line 9, for public use of club facilities 39b  N/A

40a Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 40b  X

N/A, section 4912 40b  X

N/A, section 4955 40b  X

b Section 501(c)(3) and 501(c)(4) organizations Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If 'Yes,' complete Schedule L, Part I 40c  0.

c Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 40d  0.

d Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization 40e  X

e All organizations At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T 40e  X

41 List the states with which a copy of this return is filed 41  None

42a The organization's books are in care of 42a  X

books are in care of 42a  X

located at 42a  X

GARY LONG Telephone no.  (209) 477-6881

320 LINCOLN CENTER STOCKTON CA ZIP + 4  95207

b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? 42b  X

If 'Yes,' enter the name of the foreign country 42b  X

See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of a Foreign Bank and Financial Accounts**.

c At any time during the calendar year, did the organization maintain an office outside of the U.S.? 42c  X

If 'Yes,' enter the name of the foreign country 42c  X

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** — Check here and enter the amount of tax-exempt interest received or accrued during the tax year 43  N/A

44 Did the organization maintain any donor advised funds? If 'Yes,' Form 990 must be completed instead of Form 990-EZ 44  X

45 Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If 'Yes,' Form 990 must be completed instead of Form 990-EZ 45  X

## Part VI

**Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I

47 Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E

49a Did the organization make any transfers to an exempt non-charitable related organization?

b If 'Yes,' was the related organization a section 527 organization?

	Yes	No
46		
47		
48		
49a		
49b		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

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

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

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None.'

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

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge	
	Signature of officer	Date
	► 2/29/12	
	► Type or print name and title	

Paid Preparer's Use Only	Preparer's signature	Perry Johnson	Date	2-28-12	Check if self-employed	<input type="checkbox"/> N/A	Preparer's Identifying Number (See instructions)
	Firm's name (or yours if self-employed, address, and ZIP + 4)	Hank Klor and Associates	EIN	► N/A			
	► 7330 West Lane	Stockton, CA 95210	Phone no	► (209) 473-4045			

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

BAA

►  Yes  No

Form 990-EZ (2009)



**Part II Fundraising Events.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

REVENUE		(a) Event #1 WINE TASTING (event type)	(b) Event #2 DINNER (event type)	(c) Other Events (total number)	(d) Total Events (Add col (a) through col (c))
1	Gross receipts	42,490.	15,789.		58,279.
2	Less Charitable contributions				
3	Gross income (line 1 minus line 2)	42,490.	15,789.		58,279.
DIRECT EXPENSES	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	18,096.	14,211.		32,307.
	10 Direct expense summary Add lines 4- through 9 in column (d)				32,307.
	11 Net income summary Combine lines 3, column (d) and line 10				25,972.

**Part III Gaming.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

REVENUE		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col (a) through col (c))
1	Gross revenue				
DIRECT EXPENSES	2 Cash prizes				
	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7	Direct expense summary Add lines 2 through 5 in column (d)				
8	Net gaming income summary Combine lines 1, column (d) and line 7				

9 Enter the state(s) in which the organization operates gaming activities \_\_\_\_\_

a Is the organization licensed to operate gaming activities in each of these states?

b If 'No,' explain \_\_\_\_\_

YES	NO
9a	

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?

b If 'Yes,' explain \_\_\_\_\_

10a	
11	

11 Does the organization operate gaming activities with nonmembers?

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

12	
----	--

**13** Indicate the percentage of gaming activity operated in  
 a The organization's facility  
 b An outside facility

	YES	NO
13a	%	
13b	%	

**14** Enter the name and address of the person who prepares the organization's gaming/special events books and records

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

**15a** Does the organization have a contact with a third party from whom the organization receives gaming revenue?

b If 'Yes,' enter the amount of gaming revenue received by the organization \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party \$ \_\_\_\_\_  
 c If 'Yes,' enter name and address of the third party

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

**16** Gaming manager information

Name ► \_\_\_\_\_

Gaming manager compensation ► \$ \_\_\_\_\_

Description of services provided ► \_\_\_\_\_

Director/officer       Employee       Independent contractor

**17** Mandatory distributions

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?  
 b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ \_\_\_\_\_

17a		

**2009****Federal Statements**  
**ROTARY INTERNATIONAL**  
**STOCKTON SUNRISE ROTARY****Page 1**

68-0005739

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

Cash Amount Given: \$ 32,444.

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

ADMINISTRATIVE EXPENSE	\$ 8,012.
ADVERTISING	522.
CONFERENCES, MEETINGS	1,741.
ROTARY DUES	3,697.
Total	\$ <u>13,972.</u>

**Statement 3**  
**Form 990-EZ, Part III, Line 31**  
**Statement of Program Service Accomplishments**

<u>Description</u>	<u>Grants</u>	<u>Program Service Expenses</u>
WOMEN'S CENTER		2,500.
Includes Foreign Grants: No		
TYLER/KENNEDY BOOKS FOR CHILDREN		1,961.
Includes Foreign Grants: No		
JOE KAESLIN MEMORIAL SCHOLARSHIP FUND		1,000.
Includes Foreign Grants: No		
ROTARY FOUNDATION DISTRICT GOV		550.
Includes Foreign Grants: No		
INTERACT & YOUTH SERVICES		530.
Includes Foreign Grants: No		
Total	\$ 0.	\$ <u>6,541.</u>