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Short Form Return of Organization Exempt From Income Tax

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

2009

Open to Public
Inspection

► 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 JUL 1, 2009 and ending JUN 30, 2010

B Check if applicable	C Name of organization OKLAHOMA FUNERAL DIRECTORS ASSOCIATION, INC.		D Employer identification number 73-1059316
<input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type. See Specific Instructions Number and street (or P O box, if mail is not delivered to street address) 6801 N. BROADWAY, SUITE 106		E Room/suite 527 Telephone number (405) 843-0730
	City or town, state or country, and ZIP + 4 OKLAHOMA CITY, OK 73116		F Group Exemption Number ►

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

G Accounting method Cash Accrual
Other (specify) ►

I Website. ► **WWW.OKFDA.COM**

H Check ► if the organization is not

J Tax-exempt status (check only one) — 501(c)(6) (insert no) 4947(a)(1) or 527 required to attach Schedule B (Form 990, 990-EZ or 990-PF)

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

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$500,000 or more, file Form 990 instead of Form 990-EZ ► \$ **207,457.**

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

1 Contributions, gifts, grants, and similar amounts received	1
2 Program service revenue including government fees and contracts	2
3 Membership dues and assessments	3
4 Investment income	4
5a Gross amount from sale of assets other than inventory	5a
b Less cost or other basis and sales expenses	5b
c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c
6 Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here ► <input type="checkbox"/>	
a Gross revenue (not including \$ <u>0</u>) of contributions	6a
b Less direct expenses other than fundraising expenses	6b
c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c
7a Gross sales of inventory, less returns and allowances	7a
b Less cost of goods sold	7b
c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c
8 Other revenue (describe ► SEE STATEMENT 4)	8
9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9
10 Grants and similar amounts paid (attach schedule)	10
11 Benefits paid to or for members	11
12 Salaries, other compensation, and employee benefits	12
13 Professional fees and other payments to independent contractors	13
14 Occupancy, rent, utilities, and maintenance	14
15 Printing, publications, postage, and shipping	15
16 Other expenses (describe ► SEE STATEMENT 1)	16
17 Total expenses. Add lines 10 through 16	17
18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18
19 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19
20 Other changes in net assets or fund balances (attach explanation)	20
21 Net assets or fund balances at end of year Combine lines 18 through 20	21

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	304,871.	22 360,704.
23 Land and buildings	23	
24 Other assets (describe ► SEE STATEMENT 2)	1,579.	24 1,417.
25 Total assets	306,450.	25 362,121.
26 Total liabilities (describe ► SEE STATEMENT 3)	8,260.	26 45,489.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	298,190.	27 316,632.

OKLAHOMA FUNERAL DIRECTORS
ASSOCIATION, INC.

Form 990-EZ (2009)

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Part V Other Information (Note the statement requirements in the instructions 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

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

b If "Yes," has it filed a tax return on Form 990-T for this year? **35b** 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 Sch N **36** X

37a Enter amount of political expenditures, direct or indirect, as described in the instructions **37a** 0.

b Did the organization file Form 1120-POL for this year? **37b** 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? **38a** X

b If "Yes," complete Schedule L, Part II and enter the total amount involved **38b** N/A

39 Section 501(c)(7) organizations Enter

a Initiation fees and capital contributions included on line 9 **39a** 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 **40a** N/A, section 4912 **40b** N/A, section 4955 **40c** N/A

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

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 **40e** N/A

d Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization **40f** N/A

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 **40g** X

41 List the states with which a copy of this return is filed ► OK

42a The organization's books are in care of ► OKLAHOMA FUNERAL DIRECTORS A Telephone no ► 405-843-0730
Located at ► 6801 N. BROADWAY, SUITE 106, OKLAHOMA CITY, OK ZIP + 4 ► 73116

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 ► _____
See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of 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 ► _____

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

Form 990-EZ (2009)

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Part VI

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

46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I Yes No 46

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

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

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

b If "Yes," was the related organization a section 527 organization? 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" 50

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

f Total number of other employees paid over \$100,000 ► 51

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" 51

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

d Total number of other independent contractors each receiving over \$100,000 ► 52

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 <i>Jay Baines, AS Agent</i>	Date <i>5-12-11</i>

JAY BAINES, EXECUTIVE DIRECTOR

Type or print name and title

Paid Preparer's Use Only	Preparer's signature ► <i>Reverend B. Baines</i>	Date <i>5/11/11</i>	Check if self-employed ► <input type="checkbox"/>	Preparer's identifying number (See instr) <i>P00245411</i>
	Firm's name (or yours if self-employed), address, and ZIP + 4 ► <i>ENGELBACH ROBERTS & CO.</i> ► <i>4000 CLASSEN CTR STE 100C</i> ► <i>OKLAHOMA CITY, OK 73118</i>		EIN ► <input type="checkbox"/>	Phone ► <input type="checkbox"/> no <i>(405) 528-4000</i>

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

► Yes No

Form 990-EZ (2009)

FORM 990-EZ	OTHER EXPENSES	STATEMENT	1
DESCRIPTION			AMOUNT
DISTRICT MEETINGS			12,650.
LEGISLATIVE COMMITTEE EXP			2,619.
BOARD MEETING EXPENSES			602.
INSURANCE			1,647.
CONTINUING EDUCATION EXPENSE			250.
MISCELLANEOUS EXPENSE			82.
TAXES -OTHER			128.
BANK SERVICE CHARGES			586.
OFFICE SUPPLIES AND POSTAGE			5,330.
PAYROLL TAXES			4,585.
TELEPHONE			4,062.
TRAVEL			22,600.
CONVENTION EXPENSE			40,133.
DEPRECIATION			162.
TOTAL TO FORM 990-EZ, LINE 16			<u>95,436.</u>
FORM 990-EZ			STATEMENT
OTHER ASSETS			2
DESCRIPTION			BEG. OF YEAR
PREPAID EXPENSES AND DEFERRED CHARGES			655.
OTHER DEPRECIABLE ASSETS			924.
TOTAL TO FORM 990-EZ, LINE 24			<u>1,579.</u>
			END OF YEAR
			655.
			762.
			<u>1,417.</u>
FORM 990-EZ			STATEMENT
OTHER LIABILITIES			3
DESCRIPTION			BEG. OF YEAR
CUSTODIAN FUNDS			716.
MUSIC LICENSE PAYABLE			3,347.
ACCOUNTS PAYABLE AND ACCRUED EXPENSES			2,034.
DEFERRED REVENUE			2,163.
OKLA FNL DIR SVCS PAYABLE			0.
TOTAL TO FORM 990-EZ, LINE 26			<u>8,260.</u>
			END OF YEAR
			44,096.
			0.
			1,336.
			18.
			39.
			<u>45,489.</u>

FORM 990-EZ	OTHER REVENUE	STATEMENT 4
DESCRIPTION		AMOUNT
INTEREST INCOME		3,073.
ROYALTIES		37,686.
TOTAL TO FORM 990-EZ, LINE 8		40,759.

FORM 990-EZ

INFORMATION REGARDING TRANSFERS
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 5

A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS,
DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL
BENEFIT CONTRACT? [] YES [X] NO

B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS,
DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . [] YES [X] NO

TO ASSIST IN THE CONDUCTING OF DISTRICT MEETINGS IN THE SIX DISTRICTS IN THE STATE FOR THE PURPOSE OF MAINTAINING MORE DIRECT COMMUNICATION AMONG THE MEMBERS. THESE MEETINGS ARE HELD AT LEAST FOUR TIMES A YEAR.

TO ESTABLISH, DEVELOP AND MAINTAIN THE HIGHEST POSSIBLE STANDARD FOR ETHICAL CONDUCT AND PROFICIENCY FOR THOSE ENGAGED IN THE PROFESSION OF FUNERAL SERVICE. TO ENCOURAGE THE HIGHEST EDUCATIONAL LEVEL POSSIBLE OF ITS MEMBERS AND TO CONVEY TO CONSUMERS INFORMATION AS TO FUNERAL SERVICE, FUNERAL MERCHANDISE AND TO PROTECT THE CONSUMERS' INTEREST IN REGARD THERETO

FORM 990-EZ

OTHER PROGRAM SERVICES

STATEMENT 8

DESCRIPTION

GRANTS EXPENSES

SCHOLARSHIPS ARE PROVIDED TO QUALIFIED STUDENTS WHO
ENTER THE FIELD OF FUNERAL SERVICE

TOTAL TO FORM 990-EZ, LINE 31

2010-2011 OFDA OFFICERS, DISTRICT GOVERNORS AND DISTRICT CHAIRMEN

Executive Board	Board of Governors	District Chairmen
<u>President</u> David Murch Callaway-Smith-Cobb F.H. 415 W Main Marlow, OK 73055 PH 580-658-5455 FX 580-658-2048	<u>District I</u> Jeremy Sparks 6001 N Grand Blvd. Oklahoma City, OK 73118 PH. 405-672-5885 FX: 405-672-1417	<u>District I</u> Vincent Friederich Barnes & Friederich Funeral Home 1820 S. Douglas Blvd Midwest City, OK 73130 PH 405-733-2991 FX. 405-733-5162
<u>President-Elect</u> Richard Dugger Brown-Dugger Funeral Hm 1010 7th St Perry, OK 73077 PH 580-336-4444 FX 580-336-5710	<u>District II</u> Jim Dolton Collinsville Funeral Home 1302 W Main St Collinsville, OK 74021 PH 918-371-2516 FX 918-371-2517	<u>District II</u> Jeff Stumpff Butler-Stumpff Funeral Hm 14206 N. Cincinnati Ave Skiatook, OK 74070 PH 918-396-1111 FX 918-396-1177
<u>Vice-President</u> Bill Marshall Marshall Funeral Home 230 Flynn Alva, OK 73717 PH 580-327-2311 FX 580-327-4346	<u>District III</u> Channin Hoehn Fairview Funeral Home 221 N. Main St Fairview, OK 73737 PH 580-227-4722 FX 580-227-4727	<u>District III</u> Kenny Tigner Ladusau-Evans FH 2800 N Van Buren Enid, OK 73703 PH. 580-233-1400 FX 580-233-1408
<u>Secr/Treasurer</u> Thomas Burkhart Talihina Funeral Home 204 2nd St Talihina, OK 74571 PH 918-567-4114 FX 918-567-3371	<u>District IV</u> Mark Johnson Smith Funeral Chapel 301 W Oklahoma Anadarko, OK 73005 PH 405-247-3701 FX. 405-247-5598	<u>District IV</u> Richard Varner Musick Varner Funeral Home 107 N. Crider Rd Cordell, OK 73632 PH: 580-832-5351 FX. 580-832-3369
<u>Immediate Past-President</u> Jay Hunn Hunn, Black & Merritt FH 401 N Main St Eufaula, OK 74432 PH 918-689-2553 FX 918-689-5027	<u>District V</u> Roger Clark Clark Funeral Service 305 E. Main St Tishomingo, OK 73460 PH. 580-371-2338 FX. 580-371-2330	<u>District V</u> Brian Douglas Harvey-Douglas F.H. PO Box 1551 Ardmore, Ok 73402 580-223-2323 580-226-7005 hdouglasfuneralhome.com
<u>Policy Board Member</u> Brent Shain Mt. Olive Funeral Home Box 40 Hugo, OK 74743 PH 580-326-9627 FX 580-326-9629	<u>District VI</u> Ryan Braswell Brumley-Mills Funeral Home PO Box 489 McAlester, OK 74502 PH. 918-426-0404 FX 918-426-0474	<u>District VI</u> Ruth Harkins Chaney-Harkins F H 528 S. 3rd McAlester, OK 74501 PH 918-423-5353 FX 918-423-5450
<u>Executive Director</u> Jay Barnes Oklahoma Funeral Directors Assn 6801 N. Broadway, Suite 106 Oklahoma City, OK 73116	PH. 405-843-0730 FX. 405-843-5404 email ofda@wavelinx.net	