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Form 990-EZ

Department of the Treasury
Internal Revenue ServiceShort Form
Return of Organization Exempt From Income Tax

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

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

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

OMB No 1545-1150

2009

Open to Public Inspection

A For the 2009 calendar year, or tax year beginning JUL 1, 2009 and ending JUN 30, 2010

B Check if applicable

- ☐ Address change
☐ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

Please use IRS label or print or type See Specific Instructions

C Name of organization

OKLAHOMA FUNERAL DIRECTORS
ASSOCIATION, INC.

Number and street (or P O box, if mail is not delivered to street address)

6801 N. BROADWAY, SUITE 106

City or town, state or country, and ZIP + 4

OKLAHOMA CITY, OK 73116

D Employer identification number

73-1059316

E Telephone number

(405) 843-0730

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 required to attach Schedule B (Form 990, 990-EZ, or 990-PF)J Tax-exempt status (check only one) — ☒ 501(c) (6) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527K 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	93,973.
3	Membership dues and assessments	3	72,725.
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 \$ _____ 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	40,759.
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	207,457.
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	64,650.
13	Professional fees and other payments to independent contractors	13	5,004.
14	Occupancy, rent, utilities, and maintenance	14	10,585.
15	Printing, publications, postage, and shipping	15	13,340.
16	Other expenses (describe ▶ SEE STATEMENT 1)	16	95,436.
17	Total expenses. Add lines 10 through 16	17	189,015.
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	18,442.
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	298,190.
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	316,632.

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

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**OKLAHOMA FUNERAL DIRECTORS
ASSOCIATION, INC.**

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

		Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		X
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes		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	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?	X	
35b	If "Yes," has it filed a tax return on Form 990-T for this year?	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		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a 0.		
37b	Did the organization file Form 1120-POL for this year?		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?		X
38b	If "Yes," complete Schedule L, Part II and enter the total amount involved ▶ N/A		
39a	Section 501(c)(7) organizations Enter initiation fees and capital contributions included on line 9 ▶ N/A		
39b	Gross receipts, included on line 9, for public use of club facilities ▶ N/A		
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ N/A , section 4912 ▶ N/A , section 4955 ▶ N/A		
40b	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 ▶ N/A	N/A	
40c	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 ▶ N/A		
40d	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization ▶ N/A		
40e	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 ▶ OK		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		
42b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country ▶ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.	Yes	No
42c	At any time during the calendar year, did the organization maintain an office outside of the U S ? If "Yes," enter the name of the foreign country ▶		X
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 N/A		
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ		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		X

Form 990-EZ (2009)

OKLAHOMA FUNERAL DIRECTORS

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ASSOCIATION, INC.

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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
- 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?
- 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"

	Yes	No
46		
47		
48		
49a		
49b		

(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

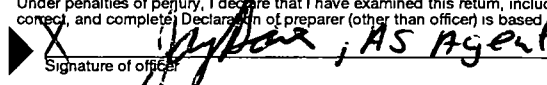
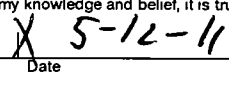

f Total number of other employees paid over \$100,000

- 51 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"

N/A

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

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		95,436.	

FORM 990-EZ	OTHER ASSETS	STATEMENT	2
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
PREPAID EXPENSES AND DEFERRED CHARGES	655.	655.	
OTHER DEPRECIABLE ASSETS	924.	762.	
TOTAL TO FORM 990-EZ, LINE 24	1,579.	1,417.	

FORM 990-EZ	OTHER LIABILITIES	STATEMENT	3
DESCRIPTION	BEG. OF YEAR	END OF YEAR	
CUSTODIAN FUNDS	716.	44,096.	
MUSIC LICENSE PAYABLE	3,347.	0.	
ACCOUNTS PAYABLE AND ACCRUED EXPENSES	2,034.	1,336.	
DEFERRED REVENUE	2,163.	18.	
OKLA FNL DIR SVCS PAYABLE	0.	39.	
TOTAL TO FORM 990-EZ, LINE 26	8,260.	45,489.	

FORM 990-EZ	OTHER REVENUE	STATEMENT	4
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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

990-EZ PG 2

STATEMENT 6

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.

990-EZ PG 2

STATEMENT 7

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
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DESCRIPTIONGRANTSEXPENSES

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

President

David Murch
Callaway-Smith-Cobb F.H.
415 W Main
Marlow, OK 73055
PH 580-658-5455
FX 580-658-2048

President-Elect

Richard Dugger
Brown-Dugger Funeral Hm
1010 7th St
Perry, OK 73077
PH 580-336-4444
FX 580-336-5710

Vice-President

Bill Marshall
Marshall Funeral Home
230 Flynn
Alva, OK 73717
PH 580-327-2311
FX 580-327-4346

Sect/Treasurer

Thomas Burkhardt
Talihina Funeral Home
204 2nd St
Talihina, OK 74571
PH 918-567-4114
FX 918-567-3371

Immediate Past-President

Jay Hunn
Hunn, Black & Merritt FH
401 N Main St
Eufaula, OK 74432
PH 918-689-2553
FX 918-689-5027

Policy Board Member

Brent Shain
Mt Olive Funeral Home
Box 40
Hugo, OK 74743
PH 580-326-9627
FX 580-326-9629

Executive Director

Jay Baines
Oklahoma Funeral Directors Assn
6801 N. Broadway, Suite 106
Oklahoma City, OK 73116

Board of Governors

District I

Jeremy Sparks
6001 N Grand Blvd.
Oklahoma City, OK 73118
PH. 405-672-5885
FX: 405-672-1417

District II

Jim Dolton
Collinsville Funeral Home
1302 W Main St
Collinsville, OK 74021
PH 918-371-2516
FX 918-371-2517

District III

Chanin Hoehn
Fairview Funeral Home
221 N. Main St
Fairview, OK 73737
PH 580-227-4722
FX 580-227-4727

District IV

Mark Johnson
Smith Funeral Chapel
301 W Oklahoma
Anadarko, OK 73005
PH 405-247-3701
FX. 405-247-5598

District V

Roger Clark
Clark Funeral Service
305 E. Main St
Tishomingo, OK 73460
PH. 580-371-2338
FX. 580-371-2330

District VI

Ryan Braswell
Brumley-Mills Funeral Home
PO Box 489
McAlester, OK 74502
PH. 918-426-0404
FX 918-426-0474

District Chairmen

District I

Vincent Friederich
Barnes & Friederich Funeral Home
1820 S. Douglas Blvd
Midwest City, OK 73130
PH 405-733-2991
FX. 405-733-5162

District II

Jeff Stumpf
Butler-Stumpff Funeral Hm
14206 N. Cincinnati Ave
Skiatook, OK 74070
PH 918-396-1111
FX 918-396-1177

District III

Kenny Tigner
Ladusau-Evans FH
2800 N Van Buren
Enid, OK 73703
PH. 580-233-1400
FX 580-233-1408

District IV

Richard Varner
Musick Varner Funeral Home
107 N. Crider Rd
Cordell, OK 73632
PH: 580-832-5351
FX. 580-832-3369

District V

Brian Douglas
Harvey-Douglas F.H.
PO Box 1551
Ardmore, Ok 73402
580-223-2323
580-226-7005
hdouglasfuneralhome.com

District VI

Ruth Harkins
Chaney-Harkins F H
528 S 3rd
McAlester, OK 74501
PH 918-423-5353
FX 918-423-5450

PH. 405-843-0730
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email ofda@wavelinx.net