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Short Form Return of Organization Exempt From Income Tax

Department of the Treasury
Internal Revenue ServiceUnder 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 July 1 , 2009, and ending June 30 , 2010 | B Check if applicable <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 | C Name of organization Financial Executives International Arizona Chapter <small>Please use IRS label or print or type See Specific Instructions</small> | D Employer identification number 86-6056242 |
| | | Number and street (or P O box, if mail is not delivered to street address) P.O. Box 16788 | Room/suite 602-327-6768 |
| | | City or town, state or country, and ZIP + 4 Phoenix, AZ 85011-6788 | F Group Exemption Number ► N/A |

• 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) ►

H Check ► if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: ► www.FEIAZ.org

J Tax-exempt status (check only one) — 501(c) (6) (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 ► **\$**

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

| | |
|--|--|
| Revenue 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 \$ 100 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) 9 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ► 194.102 | 1 2 93,958 3 99,675 4 469 5a 5b 5c 6a 6b 6c 7a 7b 7c 8 9 194.102 10 11 12 13 31,930 14 15 2,354 16 146,176 17 Total expenses. Add lines 10 through 16 ► 194,460 18 19 98,234 20 21 Net assets or fund balances at end of year. Combine lines 18 through 20 ► 97,876 |
| Expenses 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 1 17 Total expenses. Add lines 10 through 16 ► 194,460 | 10 14,000 11 12 13 14 15 2,354 16 146,176 17 194,460 18 19 98,234 20 21 97,876 |
| Net Assets 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 ► 97,876 | 18 (358) 19 98,234 20 21 97,876 |

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.) 22 Cash, savings, and investments 23 Land and buildings 24 Other assets (describe) 25 Total assets 26 Total liabilities (describe) 27 Net assets or fund balances (line 27 of column (B) must agree with line 21) | (A) Beginning of year 98,234 22 97,876 23 24 98,234 25 97,876 26 98,234 27 97,876 |
|---|---|

18

| Part III Statement of Program Service Accomplishments (See the instructions for Part III.) | | | | Expenses (Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others) |
|---|--|---|---|---|
| What is the organization's primary exempt purpose? <u>See Statement 2</u> | | | | |
| Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title. | | | | |
| 28 <u>See Statement 3</u> | | | | |
| (Grants \$) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | | | 28a |
| 29 | | | | |
| (Grants \$) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | | | 29a |
| 30 | | | | |
| (Grants \$) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | | | 30a |
| 31 Other program services (attach schedule) (Grants \$) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/> | | | | 31a |
| 32 Total program service expenses (add lines 28a through 31a) | | | | 32 14,000 |
| Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See the instructions for Part IV.) | | | | |
| (a) Name and address | (b) Title and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
| Gayle Pincus 11643 E. Appaloosa Place, Scottsdale, AZ 85259 | President, 6 | 0 | 0 | 0 |
| Michelle Hoffman 15757 N. 90th Place, Scottsdale, AZ 85260 | First Vice President, 10 | 0 | 0 | 0 |
| Dan Regan 5023 E Michelle Drive, Scottsdale, AZ 85254 | Second Vice President, 2 | 0 | 0 | 0 |
| Claire Janssen 20 E Orangewood Avenue, Phoenix, AZ 85020 | Secretary-Treasurer, 4 | 0 | 0 | 0 |
| Marcus Feder 400 N. Fifth Street, MS8587, Phoenix, AZ 85004 | Past President, 6 | 0 | 0 | 0 |
| Joan Brubacher 7030 E Fifth Avenue, Scottsdale, AZ 85251 | Director, 2 | 0 | 0 | 0 |
| Gil Christopher 6510 East Gelding Drive, Scottsdale, AZ 85254 | Director, 2 | 0 | 0 | 0 |
| Brad Denton 11811 N. Tatum Blvd. #2400, Phoenix, AZ 85028 | Director, 2 | 0 | 0 | 0 |
| Larry Eisel 4600 W Camelback Road, Glendale, AZ 85301 | Director, 2 | 0 | 0 | 0 |
| Bret Lawson 4424 North 24th Way, Phoenix, AZ 85016 | Director, 2 | 0 | 0 | 0 |
| Chris Niezgodzki 3300 W Camelback Road, Phoenix, AZ 85027 | Director, 2 | 0 | 0 | 0 |
| Jon Steging 1416 W San Pedro #101, Gilbert, AZ 85233 | Director, 2 | 0 | 0 | 0 |
| Bob Vreeland 4815 E Clelo Grande Avenue, Phoenix, AZ 85054 | Director, 2 | 0 | 0 | 0 |
| Karen Whitney 4025 S. Riverpoint, MS CF-KX04, Phoenix, AZ 85040 | Director, 2 | 0 | 0 | 0 |
| | | | | |
| | | | | |
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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 | 33 | ✓ |
| 34 Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes | 34 | ✓ |
| 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 | ✓ |
| 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 | |
| 36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N | 36 | |
| 37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ► [37a] 0 | 37b | ✓ |
| b Did the organization file Form 1120-POL for this year? | 38a | ✓ |
| 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 | |
| b If "Yes," complete Schedule L, Part II and enter the total amount involved | 39a | |
| 39 Section 501(c)(7) organizations. Enter: | 39b | |
| a Initiation fees and capital contributions included on line 9 | 40a | |
| b Gross receipts, included on line 9, for public use of club facilities | 40b | |
| 40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ► _____ ; section 4912 ► _____ ; section 4955 ► _____ | 40c | |
| 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 | |
| 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 | ✓ |
| d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization | | |
| e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T. | | |
| 41 List the states with which a copy of this return is filed. ► <u>Arizona</u> | | |
| 42a The organization's books are in care of ► <u>Claire Janssen</u> Telephone no. ► <u>602-327-6768</u> Located at ► <u>20 E Orangewood Avenue, Phoenix, AZ</u> ZIP + 4 ► <u>85020</u> | | |
| 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 | ✓ |
| 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 . | 42c | ✓ |
| c At any time during the calendar year, did the organization maintain an office outside of the U.S.? If "Yes," enter the name of the foreign country: ► _____ | | |
| 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] _____ | | |
| 44 Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ | 44 | ✓ |
| 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 | ✓ |

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.

- | | 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 | Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II | 46 | ✓ |
| 47 | Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 47 | ✓ |
| 48 | Did the organization make any transfers to an exempt non-charitable related organization? | 48 | ✓ |
| 49a | b If "Yes," was the related organization a section 527 organization? | 49a | ✓ |
| 49b | | 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." | | |

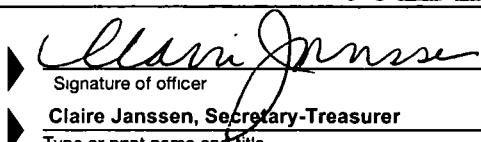
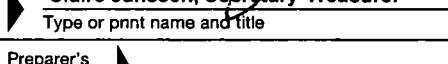
| (a) Name and address of each employee paid more than \$100,000 | (b) Title and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
|--|--|------------------|---|--|
| None | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

f Total number of other employees paid over \$100,000 ► 0

- 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 |
|--|---------------------|------------------|
| None | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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

| | |
|---|---|
| <p>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</p> | |
| Sign Here |  Signature of officer  Claire Janssen, Secretary-Treasurer Type or print name and title |
| | 10/27/10 Date |
| Paid Preparer's Use Only | Preparer's signature  Firm's name (or yours if self-employed), address, and ZIP + 4 |
| | Date Check if self-employed ► <input type="checkbox"/> Preparer's identifying number (See instructions) EIN ► Phone no ► |
| May the IRS discuss this return with the preparer shown above? See instructions ► <input type="checkbox"/> Yes <input type="checkbox"/> No | |

Financial Executives International-Arizona Chapter 86-6056242

Form 990-EZ - Other Expenses - Line 10 - Grants and similar amounts paid

| | | |
|--|---------------|--------------------------|
| 1. Arizona Cardinals Charities | \$ | 250 |
| 2. Goodwill of Central AZ | | 250 |
| 3. T.W. Lewis Foundation | | 250 |
| 4. Open Arms Home For Children | | 250 |
| 5. The Arthritis Foundation of Southern California | | 250 |
| 6. ASU Foundation | | 250 |
| 7. Susan Eckman - College Scholarship | | 2,000 |
| 8. Mark Hardy - College Scholarship | | 2,000 |
| 9. Chris Moriarty - College Scholarship | | 2,000 |
| 10. Greg Lewis - College Scholarship | | 2,000 |
| 11. Tanya Hamilton - College Scholarship | | 2,000 |
| 12. Financial Executives Research Foundation | | <u>2,500</u> |
| Total | \$ | <u>14,000</u> |

Financial Executives International Arizona Chapter 86-6056242

Form 990-EZ - Other Expenses - Line 16 - STATEMENT 1

| | |
|---|--------------------------|
| CFO of the Year Selection & Celebration | \$ 75,213 |
| Conferences, conventions, meetings | 61,363 |
| Travel | 5,851 |
| Cost of Board & Committee Meetings | 2,494 |
| Web Page Maintenance | 1,255 |
| Other | |
| TOTAL | <u>\$ 146,176</u> |

Financial Executives International Arizona Chapter 86-6056242

Form 990-EZ - Part III - STATEMENT 2

The Arizona Chapter of Financial Executive's International's (FEIAZ) primary purpose is to promote ethical conduct in the practice of financial management. FEIAZ is an unincorporated association of Financial Executive International (FEI), a not-for-profit corporation. As a member-driven chapter of FEI, FEIAZ provides peer networking opportunities, emerging issues alerts, personal and professional development, and advocacy services to CFOs, VPs of Finance, Controllers, Treasurers, and Tax Executives. Currently, the chapter supports approximately 100 members and represents top financial executives of most of the prominent companies in Arizona. FEIAZ's vision is to continue to be the association for the corporate finance profession. The organization strives to be the most contemporary, dynamic, and proactive organization of its kind. FEIAZ is and will continue to be a powerful network centered on a strong internet community and local meetings. Furthermore, FEIAZ strives to be the eyes and ears of the average finance officer facing the day-to-day challenge of enhancing their shareholders' investment. The chapter helps members anticipate and react to change, acquire new resources to enhance shareholder value, and build the personal skills to further their careers. This is accomplished by providing information through wide-ranging forms of communication, knowledge of evolving trends and issues, and high quality programs.

Financial Executives International Arizona Chapter 86-6056242

Form 990-EZ - Part III - STATEMENT 3

The Arizona Chapter of Financial Executives International (FEIAZ) sponsors and attends forums throughout the year with speakers and events, such as monthly dinner meetings, monthly continuing professional education, CFO of the Year awards, Financial Executive International (FEI) Summit, and Current Financial Reporting Issues Conference. Peer networking is a prime benefit of FEI membership, which provides numerous opportunities to gain access to the top corporate finance executives at both the local and national levels. Emerging issues updates sent online via FEI express, private net, and careertrax provide relevant information on the world of corporate finance and emerging trends and more. FEIAZ also offers advocacy services to CFOs, VPs of Finance, Controllers, Treasurers, and Tax Executives.