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Form **990-EZ**

Department of the Treasury
Internal Revenue Service

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)

▶ 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 07-01-2009 , and ending 06-30-2010

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
ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

Number and street (or P O box, if mail is not delivered to street address) | Room/suite
PO BOX 21165

City or town, state or country, and ZIP + 4
JUNEAU, AK 998021165

D Employer identification number
92-6002654

E Telephone number
(907) 790-3311

F Group Exemption Number ▶ 0573

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)

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

I Website: ▶ http //www juneaurotary org

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 ▶ $ 154,152

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		1	
	2	Program service revenue including government fees and contracts		2	
	3	Membership dues and assessments		3	60,931
	4	Investment income		4	16
	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 ▶ ☐			
	a	Gross revenue (not including $ _of contributions reported on line 1)	6a	93,205	
	b	Less direct expenses other than fundraising expenses	6b	32,709	
	c	Net income or (loss) from special events and activities (Subtract line 6b from line 6a)		6c	60,496
	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 ▶)		8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 ▶		9	121,443
Expenses	10	Grants and similar amounts paid (attach schedule)		10	43,347
	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 ▶)		16	69,945
	17	**Total expenses.** Add lines 10 through 16 ▶		17	113,292
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	8,151
	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	70,879
	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	79,030

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	82,944	22	79,252
23	Land and buildings		23	
24	Other assets (describe ▶)	305	24	0
25	**Total assets**	83,249	25	79,252
26	**Total liabilities** (describe ▶)	12,370	26	222
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	70,879	27	79,030

Part III Statement of Program Service Accomplishments (See the instructions for Part III)

What is the organization's primary exempt purpose?
TO ENCOURAGE AND FOSTER THE IDEAL OF SERVICE AS A BASIS OF WORTHY ENTERPRISE

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

Expenses (Required for section 501 (c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others)

28 VOCATIONAL SERVICE- SCHOLARSHIPS MADE TO THE LOCAL UNIVERSITY AND ROTARY YOUTH LEADERSHIP (Grants $ 0) If this amount includes foreign grants, check here . . . ▶ ☐	**28a**	12,960
29 COMMUNITY SERVICE, PROJECTS TO IMPROVE COMMUNITY SUCH AS THE AUKE BAY OVERLOOK, ADOPT A FAMILY, THE GLORY HOLE AND OTHER GRANTS TO LOCAL NONPROFIT ORGANIZATIONS (Grants $ 0) If this amount includes foreign grants, check here . . . ▶ ☐	**29a**	5,129
30 INTERNATIONAL SERVICE, YOUTH EXCHANGE PROGRAMS, WORLD COMMUNITY SERVICE PROJECTS, AND GROUP EXCHANGE PROGRAM (Grants $ 0) If this amount includes foreign grants, check here . . . ▶ ☐	**30a**	35,452
31 Other program services (attach schedule) . . . . . . (Grants $) If this amount includes foreign grants, check here . . . ▶ ☐	**31a**	
32 Total program service expenses (add lines 28a through 31a) . . . . . ▶	**32**	53,541

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated (See the instructions for Part IV)

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		No
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	34		No
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		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	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		No
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		
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		No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b			
39	*Section 501(c)(7) organizations.* Enter			
a	Initiation fees and capital contributions included on line 9 39a			
b	Gross receipts, included on line 9, for public use of club facilities 39b			
40a	*Section 501(c)(3) organizations.* Enter amount of tax imposed on the organization during the year under section 4911 ▶ _____, section 4912 ▶ _____, section 4955 ▶ _____			
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	40b		No
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 ▶ 0			
d	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization ▶ 0			
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		No

41 List the states with which a copy of this return is filed ▶ AK

42a The organization's books are in care of ▶ BRIDGET LUJAN Telephone no ▶ (907) 790-3311

Located at ▶ PO BOX 21165 JUNEAU, AK ZIP + 4 ▶ 99801

			Yes	No
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		No
	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		No
	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

			Yes	No
44	Did the organization maintain any donor advised funds? *If "Yes", Form 990 must be completed instead of Form 990-EZ.*	44		No
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		No

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.

		Yes	No
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 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 "

(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

50(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

51(d) Total number of other independent contractors each receiving over $100,000 . . . . . ▶

Please 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 — 2011-05-16 — Date

BRIDGET LUJAN TREASURER
Type or print name and title

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-empolyed	Preparer's identifying number (See instructions)
Robert L Rehfeld	2011-05-16	☐	

Firm's name (or yours if self-employed), address, and ZIP + 4: ELGEE REHFELD MERTZ LLC, 9309 GLACIER HWY STE B-200, JUNEAU, AK 99801

EIN ▶

Phone no ▶ (907) 789-3178

May the IRS discuss this return with the preparer shown above? See instructions . . . . . ▶ ☑ Yes ☐ No

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SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

2009

Open to Public Inspection

Name of the organization
ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

Employer identification number
92-6002654

Part I **Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities Check all that apply

- **a** ☐ Mail solicitations
- **b** ☐ Internet and e-mail solicitations
- **c** ☐ Phone solicitations
- **d** ☐ In-person solicitations
- **e** ☐ Solicitation of non-government grants
- **f** ☐ Solicitation of government grants
- **g** ☐ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising activities? ☐ **Yes** ☐ **No**

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization Form 990-EZ filers are not required to complete this table

(i) Name of individual or entity (fundraiser)	**(ii)** Activity	**(iii)** Did fundraiser have custody or control of contributions? Yes	(iii) No	**(iv)** Gross receipts from activity	**(v)** Amount paid to (or retained by) fundraiser listed in col **(i)**	**(vi)** Amount paid to (or retained by) organization
Total . . . . . ▶						

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing

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.

		(a) Event #1 ROSE SALES (event type)	(b) Event #2 WINE AUCTION (event type)	(c) Other Events 3 (total number)	(d) Total Events (Add col (a) through col (c))
Revenue	1 Gross receipts	41,950	23,890	1,968	67,808
	2 Less Charitable contributions				
	3 Gross income (line 1 minus line 2)	41,950	23,890	1,968	67,808
Direct Expenses	4 Cash prizes				
	5 Non-cash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	25,653	7,066		32,719
	10 Direct expense summary Add lines 4 through 9 in column (d) ▶				32,719
	11 Net income summary Combine lines 3, column d, and line 10 ▶				35,089

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.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col (a) through col (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ 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 ▶				

			Yes	No
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?	9a		
b	If "No," Explain			
10a	Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?	10a		
b	If "Yes," Explain			
11	Does the organization operate gaming activities with nonmembers?	11		
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		

			Yes	No
13	Indicate the percentage of gaming activity operated in			
a	The organization's facility	**13a**		
b	An outside facility	**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 contract with a third party from whom the organization receives gaming revenue?	**15a**		
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			
	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?	**17a**		
b	Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $			

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TY 2009 Grants and Similar Amounts Paid Schedule

Name: ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

EIN: 92-6002654

Item No.	1
Class of Activity	SCHOLARSHIP
Donee's Name	UNIVERSITY OF ALASKA SE
Donee's Address	11120 GLACIER HWY JUNEAU, AK 99801
Amount (FMV)	10,077
Purpose of Payment to Affiliate	
Relationship	UNRELATED
Description	CASH
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

Item No.	2
Class of Activity	SCHOLARSHIP
Donee's Name	UNIVERSITY OF COLORADO AT COLORADO SPRINGS
Donee's Address	1420 AUSTIN BLUFFS PARKWAY COLORADO SPRINGS, CO 80918
Amount (FMV)	2,000
Purpose of Payment to Affiliate	
Relationship	UNRELATED
Description	CASH
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

Item No.	3
Class of Activity	
Donee's Name	ROTARY INTERNATIONAL
Donee's Address	1560 SHERMAN AVENUE EVANSTON, IL 60201
Amount (FMV)	5,911
Purpose of Payment to Affiliate	ANNUAL DUES
Relationship	
Description	
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

Item No.	4
Class of Activity	
Donee's Name	ROTARY DISTRICT 5010
Donee's Address	3350 COMMERCIAL DRIVE SUITE 100 ANCHORAGE, AK 99501
Amount (FMV)	5,525
Purpose of Payment to Affiliate	DISTRICT ANNUAL DUES
Relationship	
Description	
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

Item No.	5
Class of Activity	
Donee's Name	ROTARY FOUNDATION
Donee's Address	
Amount (FMV)	19,834
Purpose of Payment to Affiliate	FOUNDATION CONTRIBUTION
Relationship	
Description	
Book Value	
How BV Determined	
How FMV Determined	
Date of Gift	

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TY 2009 Other Assets Schedule

Name: ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

EIN: 92-6002654

Description	Beginning of Year Amount	End of Year Amount
ACCOUNTS RECEIVABLE	305	0

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TY 2009 Other Expenses Schedule

Name: ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

EIN: 92-6002654

Description	Amount
LUNCH EXPENSE	28,354
CLUB SERVICE EXPENDITURES	5,129
INTERNATIONAL SERVICE EXPENDITURES	8,908
VOCATIONAL SERVICE EXPENDITURES	1,583
CREDIT CARD EXPENSE	4,071
ROTARY YOUTH EXCHANGE	6,710
CONFERENCES, CONVENTIONS & MEETINGS	12,281
SUPPLIES	132
ADMINISTRATION	2,777

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TY 2009 Other Liabilities Schedule

Name: ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

EIN: 92-6002654

Description	Beginning of Year Amount	End of Year Amount
ACCOUNTS PAYABLE	10,187	0
OTHER CURRENT LIABILITIES	2,183	222

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TY 2009 Transfers Personal Benefits Contracts Declaration

Name: ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

EIN: 92-6002654

Declaration: The organization did not, during the year, receive any funds, directly,or indirectly, to pay premiums on a personal benefit contract.The organization, did not, during the year, pay any premiums, directly,or indirectly, on a personal benefit contract.

Additional Data

Software ID:
Software Version:
EIN: 92-6002654
Name: ROTARY INTERNATIONAL JUNEAU ALASKA ROTARY CLUB

Form 990EZ, Part IV - List of Officers, Directors, Trustees, and Key Employees

(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
WARREN RUSSELL PO BOX 21165 JUNEAU,AK 99801	PRESIDENT 2 00	0	0	0
CLARK GRUENING PO BOX 21165 JUNEAU,AK 99801	VICE PRESIDENT 2 00	0	0	0
SALLY SADDLER PO BOX 21165 JUNEAU,AK 99801	PRESIDENT-ELECT 2 00	0	0	0
SHARON GAIPTMAN PO BOX 21165 JUNEAU,AK 99801	IMMEDIATE PAST PRESIDENT 2 00	0	0	0
ANN METCALFE PO BOX 21165 JUNEAU,AK 99801	SECRETARY 2 00	0	0	0
BRIDGET LUJAN PO BOX 21165 JUNEAU,AK 99801	TREASURER 2 00	0	0	0
PAM JOHNSON PO BOX 21165 JUNEAU,AK 99801	ADMINISTRATION 2 00	0	0	0
JOHN BLASCO PO BOX 21165 JUNEAU,AK 99801	CLUB SERVICE 2 00	0	0	0
VIRGINIA STONKUS PO BOX 21165 JUNEAU,AK 99801	YOUTH EXCHANGE OFFICER 2 00	0	0	0
HEATHER MITCHELL PO BOX 21165 JUNEAU,AK 99801	MEMBERSHIP 2 00	0	0	0
KAREN MORGAN PO BOX 21165 JUNEAU,AK 99801	FOUNDATION 2 00	0	0	0
MARIE NELSON-TOLAND PO BOX 21165 JUNEAU,AK 99801	PUBLIC RELATIONS 2 00	0	0	0