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► Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions)

All other organizations with gross receipts less than \$200,000 and total assets less than \$500,000 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*

Form **990-EZ** (2010)

Part II **Balance Sheets**

Check if the organization used Schedule O to respond to any question in this Part II ☒

(See the instructions for Part II)

| | (A) Beginning of year | | (B) End of year |
|---|-----------------------|-----------|-----------------|
| 22 Cash, savings, and investments | 38,495 | 22 | 44,804 |
| 23 Land and buildings | | 23 | |
| 24 Other assets (describe in Schedule O) | 27,225 | 24 | 28,785 |
| 25 Total assets | 65,720 | 25 | 73,589 |
| 26 Total liabilities (describe in Schedule O) | | 26 | |
| 27 Net assets or fund balances (line 27 of column (B) must agree with line 21) | 65,720 | 27 | 73,589 |

Part III **Statement of Program Service Accomplishments**

Check if the organization used Schedule O to respond to any question in this 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?

Organized to Promote Education & Awareness of Oregon & Northwest Wines

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 Held an auction to raise funds for scholarships (Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/> | 28a | |
| 29 Introduced currently released vintage of Oregon and Northwest wines, tasted and reviewed previous vintages of Oregon and Northwest wines (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 (describe in Schedule O) (Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/> | 31a | |
| 32 Total program service expenses (add lines 28a through 31a) <input type="checkbox"/> | 32 | |

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

Check if the organization used Schedule O to respond to any question in this 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 |
|----------------------|--|--|---|--|
|----------------------|--|--|---|--|

Part V

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

Check if the organization used Schedule O to respond to any question in this Part V ☐

| | | | |
|-----|--|-----|----|
| | | Yes | No |
| 33 | Did the organization engage in any activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O | 33 | No |
| 34 | Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions) | 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, explain in Schedule O 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 a section 501(c)(4), 501(c)(5), or 501(c)(6) organization 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? (see instructions) | 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 | |
| b | Did the organization file Form 1120-POL for this year? | 37b | No |
| 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 tax year 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 | 0 |
| b | Gross receipts, included on line 9, for public use of club facilities | 39b | 0 |
| 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 did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I | 40b | |
| 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 ▶ _____ | | |
| 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 | 40e | No |
| 41 | List the states with which a copy of this return is filed ▶ _____ | | |
| 42a | The organization's books are in care of ▶ <u>Cindy Maulsby</u> Telephone no ▶ <u>(503) 699-9095</u> Located at ▶ <u>817 Hoodview Lane</u> <u>Lake Oswego, OR</u> ZIP + 4 ▶ <u>97034</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)? 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 . | 42b | No |
| 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 ▶ _____ | 42c | No |
| 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 ▶ <u>43</u> | | |
| 44a | Did the organization maintain any donor advised funds? If "Yes", Form 990 must be completed instead of Form 990-EZ. | 44a | No |
| b | Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ | 44b | No |
| c | Did the organization receive any payments for indoor tanning services during the year? | 44c | No |
| d | If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O | 44d | No |

| | | | |
|-----|---|-----|----|
| | | Yes | No |
| 45 | Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R must be completed instead of Form990-EZ | | No |
| 45a | Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R must be completed instead of Form990-EZ | | No |
| 46 | Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | | 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 47-49b and 52.

Check if the organization used Schedule O to respond to any question in this Part VI

| | | |
|-----|---|----|
| | Yes | No |
| 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? | |
| 49b | 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 |
|--|--|------------------|---|--|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |

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 |
|--|---------------------|------------------|
| NONE | | |
| | | |
| | | |
| | | |

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

52 Did the organization complete Schedule A? **NOTE:** All Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A

YesNo

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.

| | | | | | |
|--------------------------|---|--|------|------------------------|--|
| Sign Here | Signature of officer | | Date | | |
| | Cindy M Maulsby M Treasurer | | | | |
| Paid Preparer's Use Only | Preparer's signature | Kenneth W Ivey | Date | Check if self-employed | Preparer's taxpayer identification number (See instructions) |
| | Firm's name (or yours if self-employed), address, and ZIP + 4 | Ivey Jacobson & Company LLC 5335 SW MEADOWS RD STE 455 LAKE OSWEGO, OR 97035 | | | EIN |
| | | | | | Phone no (503) 684-4585 |

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

YesNo

SCHEDULE G
(Form 990 or 990-EZ)

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

2010

Open to Public
Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization
The Oregon Wine Brotherhood

Employer identification number
93-1249528

Part I Fundraising Activities. Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

1

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

a

☐

Mail solicitations

e

☐

Solicitation of non-government grants

b

☐

Internet and e-mail solicitations

f

☐

Solicitation of government grants

c

☐

Phone solicitations

g

☐

Special fundraising events

d

☐

In-person solicitations

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 services?

☐ 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 and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did fundraiser have custody or control of contributions? | | (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 |
|---|---------------|--|----|-----------------------------------|--|---|
| | | Yes | No | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| 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 | (b) Event #2 | (c) Other Events | (d) Total Events |
|-----------------|----|--|-----------------------------------|------------------|----------------------------------|
| | | Barrel Tasting (event type) | Annual Assemblage (event type) | (total number) | (Add col (a) through col (c)) |
| Revenue | 1 | Gross receipts | 23,446 | 23,080 | 46,526 |
| | 2 | Less Charitable contributions | | | |
| | 3 | Gross income (line 1 minus line 2) | 23,446 | 23,080 | 46,526 |
| Direct Expenses | 4 | Cash prizes | | | |
| | 5 | Non-cash prizes | | | |
| | 6 | Rent/facility costs | | | |
| | 7 | Food and beverages | | | |
| | 8 | Entertainment | | | |
| | 9 | Other direct expenses | 15,308 | 23,977 | 39,285 |
| | 10 | Direct expense summary Add lines 4 through 9 in column (d) ▶ | | | 39,285 |
| | 11 | Net income summary Combine lines 3 and 10 in column (d). ▶ | | | 7,241 |

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 | <div><div><input type="checkbox"/> Yes %</div><div><input type="checkbox"/> No</div></div> | <div><div><input type="checkbox"/> Yes %</div><div><input type="checkbox"/> No</div></div> | <div><div><input type="checkbox"/> Yes %</div><div><input type="checkbox"/> No</div></div> | |
| | 7 Direct expense summary Add lines 2 through 5 in column (d) ▶ | | | | |
| | 8 Net gaming income summary Combine lines 1 and 7 in column (d) ▶ | | | | |

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? ☐ Yes ☐ No

b If "No," Explain _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," Explain _____

11

Does the organization operate gaming activities with nonmembers?

☐ Yes

☐ No

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?

☐ Yes

☐ No

13

Indicate the percentage of gaming activity operated in

| | | |
|---|-----------------------------|-----|
| a | The organization's facility | 13a |
| b | An outside facility | 13b |

14

Provide 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?

☐ Yes

☐ No

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?

☐ Yes

☐ No

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 \$

Part IV Complete this part to provide additional information for responses to question on Schedule G (see instructions.)

| Identifier | ReturnReference | Explanation |
|------------|-----------------|-------------|
|------------|-----------------|-------------|

SCHEDULE O

(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2010

Open to Public
Inspection

| | |
|---|--|
| Name of the organization The Oregon Wine Brotherhood | Employer identification number 93-1249528 |
|---|--|

| Identifier | Return Reference | Explanation |
|------------------------------------|-------------------|--|
| Form 990-EZ, Part II, Line 24 1011 | Other Assets 1011 | Prepaid Expenses and Deferred Charges - Beginning \$5000 Prepaid Expenses and Deferred Charges - Ending \$4950 |

| Identifier | Return Reference | Explanation |
|------------------------------------|-------------------|--|
| Form 990-EZ, Part II, Line 24 1010 | Other Assets 1010 | Inventories - Beginning \$21325 Inventories - Ending \$23184 |

| Identifier | Return Reference | Explanation |
|------------------------------------|-------------------|--|
| Form 990-EZ, Part II, Line 24 1005 | Other Assets 1005 | Accounts Receivable - Beginning \$0 Accounts Receivable - Ending \$200 |

| Identifier | Return Reference | Explanation |
|------------------------------------|-------------------|--|
| Form 990-EZ, Part II, Line 24 1004 | Other Assets 1004 | Miscellaneous - Beginning \$900 Miscellaneous - Ending \$451 |

| Identifier | Return Reference | Explanation |
|---------------------------------|-------------------|---------------|
| Form 990-EZ, Part I, Line 16 11 | Other Expenses 11 | Bank Fees \$2 |

| Identifier | Return Reference | Explanation |
|---------------------------------|-------------------|---------------------------|
| Form 990-EZ, Part I, Line 16 10 | Other Expenses 10 | Medallions and robes \$32 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|---------------------|
| Form 990-EZ, Part I, Line 16 9 | Other Expenses 9 | Internet Site \$180 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|-------------|
| Form 990-EZ, Part I, Line 16 8 | Other Expenses 8 | Dues \$235 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|--------------|
| Form 990-EZ, Part I, Line 16 6 | Other Expenses 6 | Awards \$859 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|--------------------------------------|
| Form 990-EZ, Part I, Line 16 5 | Other Expenses 5 | Cellar Master tasting expense \$1953 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|-----------------------|
| Form 990-EZ, Part I, Line 16 3 | Other Expenses 3 | Storage Rental \$2089 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|------------------------|
| Form 990-EZ, Part I, Line 16 2 | Other Expenses 2 | Meeting expense \$2617 |

| Identifier | Return Reference | Explanation |
|--------------------------------|------------------|-----------------------------------|
| Form 990-EZ, Part I, Line 16 1 | Other Expenses 1 | Commander's coffee expense \$2699 |

| Identifier | Return Reference | Explanation |
|-----------------------------------|---------------------|------------------|
| Form 990-EZ, Part I, Line 16 1012 | Other Expenses 1012 | Insurance \$2294 |

| Identifier | Return Reference | Explanation |
|-----------------------------------|---------------------|--------------------|
| Form 990-EZ, Part I, Line 16 1009 | Other Expenses 1009 | Depreciation \$449 |

| Identifier | Return Reference | Explanation |
|-----------------------------------|---------------------|-----------------------|
| Form 990-EZ, Part I, Line 16 1002 | Other Expenses 1002 | Office Expenses \$958 |

| Identifier | Return Reference | Explanation |
|--------------------------------|--|---|
| Form 990-EZ, Part I, Line 10 1 | Grants and Similar Amounts Paid In Excess of \$5,000 1 | Class of Activity Charitable grant Donee's Name Oregon Community Foundation Donee's Address 1221 SW Yahmill St, Suite 100 Portland, OR 97205 Relationship of Donee Unrelated Cash Amount Given \$6125 |

Additional Data

Software ID: 10000105
Software Version: 2010v3.2
EIN: 93-1249528
Name: The Oregon Wine Brotherhood

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 |
|--|--|--|---|--|
| Cindy M Maulsby PO Box 717 Lake Oswego, OR 97034 | M Treasurer 1 00 | 0 | | |
| Mike De Bonny PO Box 717 Lake Oswego, OR 97034 | M Secretary 1 00 | 0 | | |
| Tom Hageman PO Box 717 Lake Oswego, OR 97034 | Vice Grand Comm 1 00 | 0 | | |
| Diane Diamond PO Box 717 Lake Oswego, OR 97034 | Grand Commander 2 00 | 0 | | |