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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, 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*

OMB No 1545-1150

2011

Open to Public Inspection

A For the 2011 calendar year, or tax year beginning , 2011, and ending ,

B Check if applicable
- [ ] Address change
- [ ] Name change
- [ ] Initial return
- [ ] Terminated
- [ ] Amended return
- [ ] Application pending

C
CHARLOTTE COUNTY MEDICAL SOCIETY, INC.
P.O. BOX 380817
MURDOCK, FL 33938-0817

D Employer identification number
23-7027155

E Telephone number
941-625-6229

F Group Exemption Number ►

G Accounting Method [X] Cash [ ] Accrual Other (specify) ► _____

I Website: ► N/A

J Tax-exempt status (ck only one) – [ ] 501(c)(3) [X] 501(c) (6) ◄(insert no.) [ ] 4947(a)(1) or [ ] 527

H Check ► [X] if the organization is **not** 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 or a section 527 organization **and** its gross receipts are normally **not** more than $50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions) But if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts If gross receipts are $200,000 or more, or if total assets (Part II, line 25, column (B) below) are $500,000 or more, file Form 990 instead of Form 990-EZ ► $ 119,080.

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

Check if the organization used Schedule O to respond to any question in this Part I . . [X]

REVENUE	1	Contributions, gifts, grants, and similar amounts received	1	110,691.
	2	Program service revenue including government fees and contracts	2	8,350.
	3	Membership dues and assessments	3	
	4	Investment income	4	39.
	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	Gaming and fundraising events		
	a	Gross income from gaming (attach Schedule G if greater than $15,000) 6a		
	b	Gross income from fundraising events (not including $ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds $15,000) 6b		
	c	Less direct expenses from gaming and fundraising events 6c		
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	
	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 in Schedule O)	8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ►	9	119,080.
EXPENSES	10	Grants and similar amounts paid (list in Schedule O)	10	
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	57,004.
	13	Professional fees and other payments to independent contractors	13	1,550.
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	1,507.
	16	Other expenses (describe in Schedule O) See Schedule O	16	45,099.
	17	**Total expenses.** Add lines 10 through 16 ►	17	105,160.
NET ASSETS	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	13,920.
	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	172,755.
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ►	21	186,675.

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BAA For Paperwork Reduction Act Notice, see the separate instructions. Form **990-EZ** (2011)

TEEA0803L 08/05/11

8

Part II Balance Sheets. (see the instructions for Part II.)
Check if the organization used Schedule O to respond to any question in this Part II X

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	76,728.	22	93,621.
23	Land and buildings	92,175.	23	90,105.
24	Other assets (describe in Schedule O) See Schedule O	5,526.	24	3,977.
25	**Total assets**	174,429.	25	187,703.
26	**Total liabilities** (describe in Schedule O) See Schedule O	1,674.	26	1,028.
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	172,755.	27	186,675.

Part III Statement of Program Service Accomplishments (see the instrs for Part III.)
Check if the organization used Schedule O to respond to any question in this Part III . . X

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? See Schedule O

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.

28 _____

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 28a

29 _____

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 29a

30 _____

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 30a

31 Other program services (describe in Schedule O)

(Grants $) If this amount includes foreign grants, check here ▶ ☐ 31a

32 **Total program service expenses** (add lines 28a through 31a) ▶ 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 title	(b) Average hours per week devoted to position	(c) Reportable compensation (Form W-2/1099-MISC) (If not paid, enter -0-.)	(d) Contributions to employee benefit plans and deferred compensation	(e) Estimated amount of other compensation
STEVEN D. SHELL, DO Treasurer	0	0.	0.	0.
JOHN A. MOSS, MD Past President	0	0.	0.	0.
CHRISTOPHER G. CONSTANCE, MD Secretary	0	0.	0.	0.
SAMIR S. VAKIL, DPM President	0	0.	0.	0.
THOMAS KARTIS, MD Vice President	0	0.	0.	0.

Part V Other Information (Note the Schedule A and personal benefit contract 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		X
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		X
35a	Did the organization have unrelated business gross income of $1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a		X
b	If 'Yes,' to line 35a, has the organization filed a Form 990-T for the year? If 'No,' provide an explanation in Schedule O	35b		
c	Was the organization a section 501(c)(4), 501(c)(5), **or** 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If 'Yes,' complete Schedule C, Part III	35c		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 Schedule 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 tax year 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 ► N/A, section 4912 ► N/A, section 4955 ► 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 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 ► 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		X
41	List the states with which a copy of this return is filed ► None			

42a The organization's books are in care of ► PAT GARRITON Telephone no. ► 941-625-6229

Located at ► P.O. BOX 380817 MURDOCK FL ZIP + 4 ► 33938-0817

			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)? If 'Yes,' enter the name of the foreign country. ►	42b		X
	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.? If 'Yes,' enter the name of the foreign country: ►	42c		X

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** – Check here ► ☐ N/A and enter the amount of tax-exempt interest received or accrued during the tax year ► 43 N/A

			Yes	No
44a	Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44a		X
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		X
c	Did the organization receive any payments for indoor tanning services during the year?	44c		X
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		

		Yes	No
45a Did the organization have a controlled entity of the organization within the meaning of section 512(b)(13)?	45a		X
b 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 may need to be completed instead of Form 990-EZ (see instructions)	45b		X
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.	46		X

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, and complete the tables for lines 50 and 51.

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 or have a section 501(h) election in effect during the tax year? 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.'

(a) Name and title of each employee paid more than $100,000	(b) Average hours per week devoted to position	(c) Reportable compensation from the organization (Forms W-2/1099-MISC)	(d) Estimated amount of other compensation from the organization

e 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	(d) Estimated amount of other compensation

e 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. ► ☐ Yes ☐ No

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: Pat Garriton Date: 2/9/12

Type or print name and title: PAT GARRITON, EXECUTIVE DIRECTOR

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Donald W. Ashley	Donald W. Ashley	2-8-11		P0141 4333

Firm's name ► Ashley, Brown & Company, CPA'S

Firm's address ► 366 E. Olympia Ave. Punta Gorda, FL 33950

Firm's EIN ► 65-0771429

Phone no (941) 639-6600

May the IRS discuss this return with the preparer shown above? See instructions ► ☒ Yes ☐ No

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 990-EZ or to provide any additional information.
► Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
CHARLOTTE COUNTY MEDICAL SOCIETY, INC.

Employer identification number
23-7027155

Form 990-EZ, Part III - Organization's Primary Exempt Purpose

TO PROMOTE THE SCIENCE, ART AND EDUCATION OF MEDICINE AND THE BETTERMENT OF PUBLIC HEALTH ON A CHARITABLE BASIS.

Form 990-EZ, Part I, Line 16
Other Expenses

Advertising and Promotion	$ 245.
Bank Charges	633.
Depreciation	3,619.
Dues & Subscriptions	3,341.
Equipment Rental & Maintenance	3,625.
Event Expenses	11,664.
Health Services	3,260.
Insurance	6,611.
Licenses & Taxes	664.
Office Expenses	6,688.
Utilities	4,749.
Total	$ 45,099.

Form 990-EZ, Part II, Line 24
Other Assets

	Beginning	Ending
Deposits	$ 140.	$ 140.
Furniture and Fixtures	5,386.	3,837.
Total	$ 5,526.	$ 3,977.

Form 990-EZ, Part II, Line 26
Total Liabilities

	Beginning	Ending
Accounts Payable and Accrued Expenses	$ 1,674.	$ 1,028.
Total	$ 1,674.	$ 1,028.

2011 Federal Book Depreciation Schedule

CHARLOTTE COUNTY MEDICAL SOCIETY, INC.

23-7027155

2/06/12 05:03PM

No.	Description	Date Acquired	Date Sold	Cost/ Basis	Bus. Pct.	Cur 179 Bonus	Special Depr. Allow.	Prior 179/ Bonus/ Sp. Depr.	Prior Dec. Bal. Depr.	Salvage /Basis Reductn	Depr Basis	Prior Depr.	Method	Life	Rate	Current Depr.
Form 990/990-PF																
Buildings																
2	BUILDING	10/13/08		29,599							29,599	1,676	S/L MM	39	.02564	759
	Total Buildings			29,599		0	0	0	0	0	29,599	1,676				759
Furniture and Fixtures																
1	FURNITURE	10/30/08		2,000							2,000	1,016	200DB MQ	7	.14060	281
5	APPLIANCES	5/01/09		500							500	206	200DB MQ	7	.16760	84
6	(4) CHAIRS	5/21/09		716							716	296	200DB MQ	7	.16760	120
7	NETWORK SYSTEM/HARD DRIVE	6/17/09		209							209	115	200DB MQ	5	18000	38
8	CONF. TABLE/(8) CHAIRS	11/02/09		2,446							2,446	761	200DB MQ	7	19680	481
10	(2) DESKS/(3) CABINETS	4/23/09		3,252							3,252	1,343	200DB MQ	7	16760	545
	Total Furniture and Fixtures			9,123		0	0	0	0	0	9,123	3,737				1,549
Improvements																
3	IMPROVEMENTS	11/19/08		4,224							4,224	230	S/L MM	39	02564	108
9	IMPROVEMENTS	5/19/09		46,934							46,934	1,956	S/L MM	39	.02564	1,203
	Total Improvements			51,158		0	0	0	0	0	51,158	2,186				1,311
Land																
4	LAND	10/13/08		15,280							15,280					0
	Total Land			15,280		0	0	0	0	0	15,280	0				0

No.	Description	Date Acquired	Date Sold	Cost/ Basis	Bus. Pct.	Cur 179 Bonus	Special Depr. Allow.	Prior 179/ Bonus/ Sp. Depr.	Prior Dec. Bal Depr.	Salvage /Basis Reductn	Depr. Basis	Prior Depr.	Method	Life	Rate	Current Depr.
	Total Depreciation			105,160		0	0	0	0	0	105,160	7,599				3,619
	Grand Total Depreciation			105,160		0	0	0	0	0	105,160	7,599				3,619