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Form 990-EZ

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

Department of the Treasury  
Internal Revenue Service

A For the 2011 calendar year, or tax year beginning 01-01-2011, and ending 12-31-2011

B

Check if applicable

Address change

Name change

Initial return

Terminated

Amended return

Application pending

C Name of organization

FINANCIAL PLANNING ASSOCIATION OF CENTRAL VIRGINIA

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

Room/suite

18563 WILLOUGHBY HTS LANE

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

ROCKVILLE, VA 23146

D Employer identification number

54-1872365

E Telephone number

(804) 749-8149

F Group Exemption Number

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:

N/A

J Tax-Exempt status (check only one)

☐ 501(c)(3)

☒ 501(c)( 6)

☐ (insert no )

☐ 4947(a)(1) or

☐ 527

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

\$

60,950

| 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 . . . . . <input checked="" type="checkbox"/> |    |                                                                                                                                                                                                                                                                                                 |    |        |  |  |  |  |  |
| Revenue                                                                                                                           | 1  | Contributions, gifts, grants, and similar amounts received . . . . .                                                                                                                                                                                                                            | 1  | 0      |  |  |  |  |  |
|                                                                                                                                   | 2  | Program service revenue including government fees and contracts . . . . .                                                                                                                                                                                                                       | 2  | 19,781 |  |  |  |  |  |
|                                                                                                                                   | 3  | Membership dues and assessments . . . . .                                                                                                                                                                                                                                                       | 3  | 0      |  |  |  |  |  |
|                                                                                                                                   | 4  | Investment income . . . . .                                                                                                                                                                                                                                                                     | 4  | 0      |  |  |  |  |  |
|                                                                                                                                   | 5a | Gross amount from sale of assets other than inventory . . . . .                                                                                                                                                                                                                                 | 5a |        |  |  |  |  |  |
|                                                                                                                                   | b  | Less cost or other basis and sales expenses . . . . .                                                                                                                                                                                                                                           | 5b | 0      |  |  |  |  |  |
|                                                                                                                                   | c  | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .                                                                                                                                                                                               | 5c | 0      |  |  |  |  |  |
|                                                                                                                                   | 6  | Gaming and fundraising events                                                                                                                                                                                                                                                                   |    |        |  |  |  |  |  |
|                                                                                                                                   | a  | Gross income from gaming (attach Schedule G if greater than \$15,000)                                                                                                                                                                                                                           | 6a | 0      |  |  |  |  |  |
|                                                                                                                                   | 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 | 40,535 |  |  |  |  |  |
|                                                                                                                                   | c  | Less direct expenses from gaming and fundraising events . . . . .                                                                                                                                                                                                                               | 6c | 26,586 |  |  |  |  |  |
|                                                                                                                                   | d  | Net income or (loss) from gaming and fundraising events (Add lines 6a and 6b and subtract line 6c)                                                                                                                                                                                              | 6d | 13,949 |  |  |  |  |  |
|                                                                                                                                   | 7a | Gross sales of inventory, less returns and allowances . . . . .                                                                                                                                                                                                                                 | 7a |        |  |  |  |  |  |
|                                                                                                                                   | b  | Less cost of goods sold . . . . .                                                                                                                                                                                                                                                               | 7b | 0      |  |  |  |  |  |
|                                                                                                                                   | c  | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) . . . . .                                                                                                                                                                                                        | 7c | 0      |  |  |  |  |  |
|                                                                                                                                   | 8  | Other revenue (describe in Schedule O) . . . . .                                                                                                                                                                                                                                                | 8  | 634    |  |  |  |  |  |
|                                                                                                                                   | 9  | Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 . . . . .                                                                                                                                                                                                                                | 9  | 34,364 |  |  |  |  |  |
| 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 | 16,528 |  |  |  |  |  |
|                                                                                                                                   | 13 | Professional fees and other payments to independent contractors . . . . .                                                                                                                                                                                                                       | 13 |        |  |  |  |  |  |
|                                                                                                                                   | 14 | Occupancy, rent, utilities, and maintenance . . . . .                                                                                                                                                                                                                                           | 14 |        |  |  |  |  |  |
|                                                                                                                                   | 15 | Printing, publications, postage, and shipping . . . . .                                                                                                                                                                                                                                         | 15 | 62     |  |  |  |  |  |
|                                                                                                                                   | 16 | Other expenses (describe in Schedule O) . . . . .                                                                                                                                                                                                                                               | 16 | 11,893 |  |  |  |  |  |
|                                                                                                                                   | 17 | Total expenses. Add lines 10 through 16 . . . . .                                                                                                                                                                                                                                               | 17 | 28,483 |  |  |  |  |  |
| Net Assets                                                                                                                        | 18 | Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .                                                                                                                                                                                                                       | 18 | 5,881  |  |  |  |  |  |
|                                                                                                                                   | 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 | 67,213 |  |  |  |  |  |
|                                                                                                                                   | 20 | Other changes in net assets or fund balances (explain in Schedule O) . . . . .                                                                                                                                                                                                                  | 20 | 2,150  |  |  |  |  |  |
|                                                                                                                                   | 21 | Net assets or fund balances at end of year Combine lines 18 through 20 . . . . .                                                                                                                           | 21 | 75,244 |  |  |  |  |  |

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat No 10642I

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 . . . . .                                      | 66,990                | 22              | 75,244 |
| 23                                  | Land and buildings . . . . .                                                  |                       | 23              |        |
| 24                                  | Other assets (describe in Schedule O) . . . . .                               | 223                   | 24              |        |
| 25                                  | Total assets . . . . .                                                        | 67,213                | 25              | 75,244 |
| 26                                  | Total liabilities (describe in Schedule O) . . . . .                          |                       | 26              |        |
| 27                                  | Net assets or fund balances (line 27 of column (B) must agree with line 21) . | 67,213                | 27              | 75,244 |

Part III

Statement of Program Service Accomplishments

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

☒

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

SEE SCHEDULE O

(Grants \$ )

If this amount includes foreign grants, check here

☐

28a

29

ALSO CONDUCTS COMMUNITY OUTREACH PROGRAMS TO EDUCATE THE PUBLIC ABOUT THE VALUE OF FINANCIAL PLANNING

(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 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 |
|---------------------------|----------------------------------------------------------|--------------------------------------------|---------------------------------------------------------------------|------------------------------------------|
| See Additional Data Table |                                                          |                                            |                                                                     |                                          |
|                           |                                                          |                                            |                                                                     |                                          |
|                           |                                                          |                                            |                                                                     |                                          |
|                           |                                                          |                                            |                                                                     |                                          |

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 significant 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 <b>not</b> 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 during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?                                                                                                                                                                                                                                                                                    | 35a | No |
| b   | If "Yes" to line 35a, has the organization filed a <b>Form 990-T</b> 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 | No |
| 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 <input type="checkbox"/> <b>37a</b> <input type="text"/>                                                                                                                                                                                                                                                                                                                   |     |    |
| b   | Did the organization file <b>Form 1120-POL</b> for this year? . . . . .                                                                                                                                                                                                                                                                                                                                                                                                 | 37b | No |
| 38a | Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee <b>or</b> 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 |    |
| 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 <input type="checkbox"/> _____, section 4912 <input type="checkbox"/> _____, section 4955 <input type="checkbox"/> _____                                                                                                                                                                                                                            |     |    |
| 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 . . . <input type="checkbox"/> _____                                                                                                                                                                                                                                                    |     |    |
| d   | Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization . . . . . <input type="checkbox"/> _____                                                                                                                                                                                                                                                                                                                  |     |    |
| 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 <input type="checkbox"/> _____                                                                                                                                                                                                                                                                                                                                                                                |     |    |
| 42a | The organization's books are in care of <input type="checkbox"/> GRAY GLASS _____ Telephone no <input type="checkbox"/> (804) 539-1313<br>18563 WILLOUGHBY HTS LANE<br>Located at <input type="checkbox"/> ROCKVILLE, VA _____ ZIP + 4 <input type="checkbox"/> 23146                                                                                                                                                                                                   |     |    |
| 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)?<br>If "Yes," enter the name of the foreign country <input type="checkbox"/> _____<br>See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts</b> . | 42b | No |
| c   | At any time during the calendar year, did the organization maintain an office outside of the U S ?<br>If "Yes," enter the name of the foreign country <input type="checkbox"/> _____                                                                                                                                                                                                                                                                                    | 42c | No |
| 43  | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> —Check here <input type="checkbox"/> <input type="checkbox"/><br>and enter the amount of tax-exempt interest received or accrued during the tax year . . . . . <input type="checkbox"/> <b>43</b> <input type="text"/>                                                                                                                                                    |     |    |
| 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 |    |
| 45a | Did the organization have a controlled entity within the meaning of section 512(b)(13)?                                                                                                                                                                                                                                                                                                                                                                                 | 45a | No |
| 45b | 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 | No |

|    |                                                                                                                                                                                            |     |    |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
|    |                                                                                                                                                                                            | Yes | 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 |     |    |

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

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 |
|------------------------------------------------------------------------------|---------------------|------------------|
|                                                                              |                     |                  |
|                                                                              |                     |                  |
|                                                                              |                     |                  |
|                                                                              |                     |                  |
|                                                                              |                     |                  |

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

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                                                                       | *****                                                         |                                    | 2012-09-11                                                   |                                                            |
|                                                                                 | Signature of officer                                          |                                    | Date                                                         |                                                            |
| Paid Preparer's Use Only                                                        | GRAY GLASS TREASURER                                          |                                    |                                                              |                                                            |
|                                                                                 | Type or print name and title                                  |                                    |                                                              |                                                            |
|                                                                                 | Preparer's signature                                          | MEREDITH A HIERHOLZER              | Date<br>2012-09-11                                           | Check if self-employed <input checked="" type="checkbox"/> |
|                                                                                 | Firm's name (or yours if self-employed), address, and ZIP + 4 |                                    | Preparer's taxpayer identification number (See instructions) |                                                            |
|                                                                                 |                                                               | BOOKKEEPING & ACCOUNTING SOLUTIONS |                                                              | EIN                                                        |
|                                                                                 |                                                               | 8503 GLENDEVON CIR                 |                                                              |                                                            |
|                                                                                 |                                                               | CHESTERFIELD, VA 23838             |                                                              | Phone no (804) 318-3990                                    |
| May the IRS discuss this return with the preparer shown above? See instructions |                                                               |                                    |                                                              |                                                            |
| Yes No                                                                          |                                                               |                                    |                                                              |                                                            |

Additional Data

Software ID:  
Software Version:  
EIN: 54-1872365  
Name: FINANCIAL PLANNING ASSOCIATION OF CENTRAL VIRGINIA

Form 990-EZ, Special Condition Description:

|                               |
|-------------------------------|
| Special Condition Description |
|-------------------------------|

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 |
|-------------------------------------------------------------------------------|----------------------------------------------------------|--------------------------------------------|---------------------------------------------------------------------|------------------------------------------|
| PATRICK M MCALEER<br>4801 COX RD SUITE 112<br>GLEN ALLEN,VA 23060             | PRESIDENT 0 00                                           | 0                                          |                                                                     |                                          |
| LISA HATCHER BYLES<br>2801 MCRAE RD SUITE 2A<br>RICHMOND,VA 23235             | DIRECTOR 0 00                                            | 0                                          |                                                                     |                                          |
| GRAY GLASS<br>4405 COX ROAD SUITE 250<br>GLEN ALLEN,VA 23060                  | Treasurer 0 00                                           | 0                                          |                                                                     |                                          |
| ROBERT L THALHIMER<br>7501 BOULDERS VIEW DRIVE SUITE 110<br>RICHMOND,VA 23225 | Director 0 00                                            | 0                                          |                                                                     |                                          |
| PETER TOMASCH<br>7100 FOREST AVENUE 301<br>RICHMOND,VA 23226                  | Director 0 00                                            | 0                                          |                                                                     |                                          |

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

2011

Open to Public  
Inspection

Name of the organization  
FINANCIAL PLANNING ASSOCIATION OF CENTRAL VIRGINIA

Employer identification number  
54-1872365

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

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 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.

| Revenue         |  | (a) Event #1                                                            | (b) Event #2 | (c) Other Events | (d) Total Events              |
|-----------------|--|-------------------------------------------------------------------------|--------------|------------------|-------------------------------|
|                 |  | FINANCIAL FORUM                                                         |              |                  | (Add col (a) through col (c)) |
|                 |  | (event type)                                                            | (event type) | (total number)   |                               |
|                 |  | 1 Gross receipts . . . .                                                | 40,535       |                  | 40,535                        |
|                 |  | 2 Less Charitable contributions . . . .                                 |              |                  |                               |
| Direct Expenses |  | 3 Gross income (line 1 minus line 2) . . . .                            | 40,535       |                  | 40,535                        |
|                 |  | 4 Cash prizes . . . .                                                   |              |                  |                               |
|                 |  | 5 Non-cash prizes . . . .                                               |              |                  |                               |
|                 |  | 6 Rent/facility costs . . . .                                           |              |                  |                               |
|                 |  | 7 Food and beverages . . . .                                            |              |                  |                               |
|                 |  | 8 Entertainment . . . .                                                 |              |                  |                               |
|                 |  | 9 Other direct expenses . . . .                                         | 26,586       |                  | 26,586                        |
|                 |  | 10 Direct expense summary Add lines 4 through 9 in column (d) . . . . . |              |                  | ( 26,586 )                    |
|                 |  | 11 Net income summary Combine lines 3 and 10 in column (d) . . . . .    |              |                  | 13,949                        |

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)) |
| Direct Expenses |  | 1 Gross revenue . . . . .                                                 |                                                          |                                                          |                               |
|                 |  | 2 Cash prizes . . . . .                                                   |                                                          |                                                          |                               |
|                 |  | 3 Non-cash prizes . . . . .                                               |                                                          |                                                          |                               |
|                 |  | 4 Rent/facility costs . . . . .                                           |                                                          |                                                          |                               |
|                 |  | 5 Other direct expenses . . . . .                                         |                                                          |                                                          |                               |
|                 |  | 6 Volunteer labor . . . . .                                               | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |                               |
|                 |  | 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?

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

2011

Open to Public Inspection

Name of the organization  
FINANCIAL PLANNING ASSOCIATION OF CENTRAL VIRGINIA

Employer identification number  
54-1872365

| Identifier                  | Return Reference | Explanation                                                                                                                                               |
|-----------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| PART III                    |                  | PRIMARY EXEMPT PURPOSE- THE PRIMARY AIM OF THE FINANCIAL                                                                                                  |
|                             |                  | PLANNING ASSOCIATION IS TO BE THE COMMUNITY THAT FOSTERS THE                                                                                              |
|                             |                  | VALUE OF FINANCIAL PLANNING AND ADVANCES THE FINANCIAL                                                                                                    |
|                             |                  | PLANNING PROFESSION FPA'S STRATEGY TO ACCOMPLISH ITS                                                                                                      |
|                             |                  | OBJECTIVES INVOLVES WELCOMING ALL THOSE WHO ADVANCE THE                                                                                                   |
|                             |                  | FINANCIAL PLANNING PROCESS AND PROMOTING THE CFP MARK                                                                                                     |
|                             |                  | AS THE CORNERSTONE OF THE FINANCIAL PLANNING PROFESSION                                                                                                   |
| PART III LINE 28            |                  | PROGRAM SERVICE ACCOMPLISHMENTS, MONTHLY CONTINUING                                                                                                       |
|                             |                  | EDUCATION MEETINGS FOR MEMBERS AND GUESTS FOSTERS GROWTH                                                                                                  |
|                             |                  | OF PROFESSIONALS, NETWORKING OPPORTNITIES AND AN                                                                                                          |
|                             |                  | ENVIRONMENT TO MEET THE CONTINUING EDUCATION REQUIREMENT                                                                                                  |
|                             |                  | OF THE CFP BOARD                                                                                                                                          |
| PART V                      |                  | INFORMATION REGARDING PERSONAL BENEFIT CONTRACTS 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                                                                                                                                 |
| Form 990EZ, Part I, Line 8  |                  | INTEREST 274 GUEST PAYMENTS 360                                                                                                                           |
| Form 990EZ, Part I, Line 16 |                  | LICENSES & FEES 25 MILEAGE 20 MISCELLANEOUS 421 OFFICE SUPPLIES 362 PROGRAM EXPENSES 3614 SCHOLARSHIPS 1000 TAXES 74 TECHNOLOGY 2889 MEMBERSHIP MGMT 3488 |

| Identifier                   | Return Reference | Explanation             |
|------------------------------|------------------|-------------------------|
| Form 990EZ, Part II, Line 24 |                  | FEDERAL TX WITHHELD 223 |