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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 06-01-2011 , and ending 05-31-2012

☐ Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Terminated

☐ Amended return

☐ Application pending

C Name of organization
Independent Insurance Agents of Tuscaloosa Inc

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

PO Box 2309

City or town, state or country, and ZIP + 4
Tuscaloosa, AL 35403

D Employer identification number
63-0732859

E Telephone number
(205) 345-8717

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 ► \$ 18,457

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 ☒

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	
	2	Program service revenue including government fees and contracts	2	17,906
	3	Membership dues and assessments	3	
	4	Investment income	4	551
	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	6d	
	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	
Expenses	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	18,457
	10	Grants and similar amounts paid (list in Schedule O)	10	12,194
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	
Net Assets	13	Professional fees and other payments to independent contractors	13	1,920
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	
	16	Other expenses (describe in Schedule O)	16	10,975
	17	Total expenses. Add lines 10 through 16	17	25,089
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-6,632
	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	86,420
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	0
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ►	21	79,788

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	86,420	22	79,788
23	Land and buildings		23	
24	Other assets (describe in Schedule O)		24	
25	Total assets	86,420	25	79,788
26	Total liabilities (describe in Schedule O)	0	26	0
27	Net assets or fund balances (line 27 of column (B) must agree with line 21) .	86,420	27	79,788

Part III Statement of Program Service Accomplishments		Expenses	
Check if the organization used Schedule O to respond to any question in this Part III		☒	
What is the organization's primary exempt purpose? To improve conditions in the insurance industry, to foster sound and ethical practices in insurance writing, to promote the continued education of its members, and to secure and maintain good relations between the insurance industry and the insuring public		(Required for section 501 (c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others)	
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	As part of its community outreach, the association provided coats and shoes for economically disadvantaged children in the Tuscaloosa area (Grants \$ 0) If this amount includes foreign grants, check here	28a	6,744
29	As part of its community outreach, the association supported the YMCA's Strong Kids Campaign and provided other community assistance (Grants \$ 0) If this amount includes foreign grants, check here	29a	4,950
30	As part of its community outreach, the association supported the Excalibur Education Foundation, and as part of its effort to improve the insurance industry (Grants \$ 0) If this amount includes foreign grants, check here	30a	500
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	12,194

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
Kevin Myrick 2105 Jack Warner Parkway Tuscaloosa, AL 35404	President 1 00	0	0	0
Andrew Hudson 1120 Queen City Avenue Tuscaloosa, AL 35401	Vice-President 1 00	0	0	0
Tom Bonhaus 1120 Queen City Avenue Tuscaloosa, AL 35401	Secretary/Treasurer 1 00	0	0	0

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 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 during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a	Yes
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	Yes
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 ☐ 37a 0		
b	Did the organization file Form 1120-POL for this year?	37b	
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the 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 ☐ , 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 ☐ Yeager and Christian PC Telephone no ☐ (205) 345-8717 1418 22nd Avenue Located at ☐ Tuscaloosa, AL ZIP + 4 ☐ 35401		
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 ☐ and enter the amount of tax-exempt interest received or accrued during the tax year	43	
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	

		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		
46			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 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	***** Signature of officer	2012-08-14 Date		
	Tom Bonhaus Secretary/Treasurer Type or print name and title			
Paid Preparer's Use Only	Preparer's signature John F Yeager Jr	Date 2012-08-14	Check if self-employed	Preparer's taxpayer identification number (See instructions) P01312294
	Firm's name (or yours if self-employed), address, and ZIP + 4	Yeager & Christian PC 1418 - 22nd Avenue Tuscaloosa, AL 35401		EIN 63-0800236
				Phone no (205) 345-8717

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

Yes No

Additional Data

Software ID:
Software Version:
EIN: 63-0732859
Name: Independent Insurance Agents of Tuscaloosa Inc

Form 990-EZ, Special Condition Description:

Special Condition Description

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 Independent Insurance Agents of Tuscaloosa Inc	Employer identification number 63-0732859
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Identifier	Return Reference	Explanation
Other Investment Income	Form 990-EZ, Part I, Line 4	Interest Income 551
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Specific Assistance to Individuals Grantee Name Coats/shoes for local disadvantaged children Grantee Address PO Box 2309 Tuscaloosa, AL 35403 Grantee Relationship None Date of Gift 12/07/11 Amount Given 6,744
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Boy Scouts of America Grantee Address 2700 River Road N E Tuscaloosa, AL 35401 Grantee Relationship None Date of Gift 03/12/12 Amount Given 250
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name YMCA Grantee Address 2939 18th Street Tuscaloosa, AL 35401 Grantee Relationship None Date of Gift 06/16/11 Amount Given 1,500
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Excalibur Education Foundation Grantee Address 141 London Parkway Birmingham, AL 35211 Grantee Relationship None Date of Gift 12/07/11 Amount Given 500
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Focus on Senior Citizens Grantee Address 1920 6th Street Tuscaloosa, AL 35401 Grantee Relationship None Date of Gift 09/12/11 Amount Given 200
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Eagles' Wings, Inc Grantee Address 2205 9th Avenue Northport, AL 35476 Grantee Relationship None Date of Gift 10/03/11 Amount Given 500
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Tuscaloosa Police Athletic League Grantee Address 3801 Mill Creek Avenue Tuscaloosa, AL 35401 Grantee Relationship None Date of Gift 12/14/11 Amount Given 500
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name YMCA Grantee Address 2939 18th Street Tuscaloosa, AL 35401 Grantee Relationship None Date of Gift 04/03/12 Amount Given 1,500
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Community Foundation of West Alabama Grantee Address 700 Energy Center Blvd Northport, AL 35473 Date of Gift 04/23/12 Amount Given 250
Grants and Similar Amounts Paid	Form 990-EZ, Part I, Line 10	Activity Classification Charitable Grantee Name Tuscaloosa Quarterback Club Grantee Address 13763 Brandon James Avenue Northport, AL 35475 Date of Gift 04/30/12 Amount Given 250 Total included on Form 990-EZ, line 10 12,194
Other Expenses	Form 990-EZ, Part I, Line 16	Description Bank Charges Amount 2 Description Insurance Amount 1,493 Description Meetings and Christmas party Amount 2,949 Description Taxes Amount 3,314 Description Advertising Amount 2,617 Description Miscellaneous Amount 600 Total to Form 990-EZ, line 16 10,975

**TY 2011 Transfers Personal Benefits
Contracts Declaration**

Name: Independent Insurance Agents of Tuscaloosa Inc

EIN: 63-0732859

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