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Form

990-EZ

Short Form Return of Organization Exempt From Income Tax

OMB No 1545-1150

2011**Open to Public
Inspection**Department of the Treasury
Internal Revenue Service

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.

A For the 2011 calendar year, or tax year beginning 1 June, 2011, and ending 31 May, 2012

B Check if applicable:
☐ Address change
☒ Name change
☐ Initial return
☐ Terminated
☐ Amended return
☐ Application pending

C Name of organization
Pearl Harbor Submarine Officers Spouses Association
 Number and street (or P.O. box, if mail is not delivered to street address) Room/suite
4725 Bougainville Dr, PMB 396
 City or town, state or country, and ZIP + 4
Honolulu, HI 96818

D Employer identification number
99-6009149

E Telephone number
407-415-8629

F Group Exemption Number ►

G Accounting Method: ☒ Cash ☐ Accrual Other (specify) ►

I Website: ► **www.pearlharborsosa.org**

J Tax-exempt status (check only one) — ☐ 501(c)(3) ☒ 501(c) (7) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

H Check ☒ 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. **\$ 51979**

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	813
	2	Program service revenue including government fees and contracts	2	
	3	Membership dues and assessments	3	1800
	4	Investment income	4	8
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less: cost or other basis and sales expenses	5b	
	5c	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	
Expenses	b	Gross income from fundraising events (not including \$ 813 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	1397
	c	Less: direct expenses from gaming and fundraising events	6c	202
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	1195
	7a	Gross sales of inventory, less returns and allowances	7a	41222
	b	Less: cost of goods sold	7b	26595
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	14627
	8	Other revenue (describe in Schedule O)	8	6739
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	25182
	10	Grants and similar amounts paid (list in Schedule O)	10	10300
	Net Assets	11	Benefits paid to or for members	11
12		Salaries, other compensation, and employee benefits	12	
13		Professional fees and other payments to independent contractors	13	
14		Occupancy, rent, utilities, and maintenance	14	
15		Printing, publications, postage, and shipping	15	462
16		Other expenses (describe in Schedule O)	16	14623
17		Total expenses. Add lines 10 through 16	17	25385
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-203	
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	17797	
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	17594	

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No 106421

Form 990-EZ (2011)

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4

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 significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O	33	✓
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	✓
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	✓
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	✓
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	✓
37a Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a n/a		
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	✓
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	✓
41 List the states with which a copy of this return is filed. ▶		
42a The organization's books are in care of ▶ Rebecca Cunningham & MarryAnne Pitts Telephone no. ▶ 407-415-8629 Located at ▶ 4725 Bougainville Dr, PMB 396, Honolulu, HI ZIP + 4 ▶ 96818		
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	✓
c At any time during the calendar year, did the organization maintain an office outside the U.S.? If "Yes," enter the name of the foreign country: ▶	42c	✓
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43		
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	✓
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	✓
c Did the organization receive any payments for indoor tanning services during the year?	44c	✓
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	✓
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	✓

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

	Yes	No
46		<input checked="" type="checkbox"/>

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 ☐

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

	Yes	No
47		<input checked="" type="checkbox"/>

48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

48		<input checked="" type="checkbox"/>
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49a Did the organization make any transfers to an exempt non-charitable related organization?

49a		<input checked="" type="checkbox"/>
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b If "Yes," was the related organization a section 527 organization?

49b		<input checked="" type="checkbox"/>
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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) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
None				

f Total number of other employees paid over \$100,000

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."


(a) Name and address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
None		

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		12 June 2012
	Rebecca L. Cunningham, Treasurer	Date
	Type or print name and title	

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name	Firm's EIN			
	Firm's address	Phone no.			

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

Pearl Harbor Submarine Officers' Spouses' Association

Employer identification number

99-6009149

990EZ Part I Line 10 and Part II Line 28 "Grants and similar amounts paid" breakdown of \$10,300: \$10,000 paid to Dolphin Scholarship
Foundation, \$100 paid to Fisher House at Tripler AMC, \$200 paid to Pearl Harbor Submarine Spouses Charitable Association

990EZ Part I Line 16 "Other Expenses" breakdown of \$14,623:

\$18 bank fees

\$827 Office and Store supplies (envelopes, binders, name tags, etc)

\$1,844 Hawaii State General Excise Tax for fiscal year

\$8,254 Refreshments and Decorations

\$173 Mailbox rental

\$600 Gifts and Door Prizes

\$1,886 Credit card fees

\$423 Internet fees

\$198 Computer supplies

\$400 donations for several submarine Family Support Groups, Club events, Military Spouses Workshops, etc

990EZ Part I Line "Other Revenue" breakdown of \$6739

\$469 Money collected for group bill at Installation Tea Breakfast on May 17, 2012

\$5710 Ticket sales for social event held on October 22, 2011. Not a fund-raising event.

\$560 Ticket sales for social event held on February 25, 2012. Not a fund-raising event.

990 EZ Part II Line 24- inventory (submarine and Navy related merchandise)

PEARL HARBOR SUBMARINE OFFICERS SPOUSES ASSOCIATION ARTICLES

ARTICLE I – NAME

The organization formerly called Pearl Harbor Submarine Officers Wives Club shall be called the "Pearl Harbor Submarine Officers Spouses Association", hereinafter referred to as "PHSOSA".

ARTICLE II – PURPOSE

The purpose of the PHSOSA is to operate as a 501(c) (7), non-profit, tax exempt social club. PHSOSA is organized for the pleasure and recreation of its members. PHSOSA shall foster friendships and provide mutual support for its members, thus benefiting the families of submarine officers and the submarine community in the Pearl Harbor area.

No part of the activities of the PHSOSA shall be the carrying on of propaganda, or otherwise attempting to influence legislation. The PHSOSA shall not participate or intervene in any political campaign, on behalf of or in opposition of any political candidate.

The PHSOSA shall not carry on any other activities that are not permitted to be carried on (a) by an association exempt from Federal Income Tax under Section 501 (c) (7) of the Internal Revenue Code.

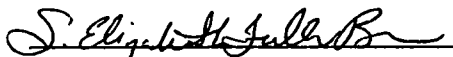
No part of any PHSOSA funds shall be distributed for the benefit of its members, officers, advisors, or other private persons. The PHSOSA shall be authorized and empowered to pay reasonable compensation for services rendered.

ARTICLE III – MEMBERSHIP

The following shall be eligible for PHSOSA membership: Spouses of all active, retired or deceased submarine officers; spouses of officers who are now or have been in the past associated with the submarine force; spouses of Government Service Employees (GS-7 and above) who are associated with the submarine force; or others showing special interest in this club, as recognized by the Executive Board and with approval of the General Membership.

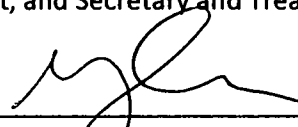
ARTICLE IV – OFFICERS

The PHSOSA officers shall be the President, Vice President, and Secretary and Treasurer.



Sharon Elizabeth Fuller Boone
PHSOSA President
4725 Bougainville Drive
PMB 396
Honolulu, HI 96818

June 1, 2011
date



Rebecca Cunningham
PHSOSA Treasurer
4725 Bougainville Drive
PMB 396
Honolulu, HI 96818

June 1, 2011
date

DECLARATION

We declare that the amended Bylaws of Pearl Harbor Submarine Officers Spouses Association (PHSOSA) changing the organization's name from Pearl Harbor Submarine Officers' Wives' Club (PHSOWC) were adopted on April 21, 2011.

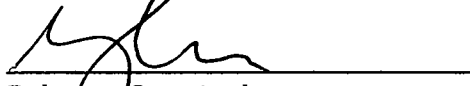
All members in attendance at our February 17, 2011 meeting voted to change the organization's name as of June 1, 2011. A committee of three members volunteered to review and amend the Bylaws of PHSOWC to reflect this change. All members in attendance at our April 21, 2011 meeting voted to adopt the amended Bylaws of PHSOSA.

The copy submitted with our request for recognition is a complete and accurate copy of our original document.



Sharon Elizabeth Fuller Boone
President, PHSOSA

June 1, 2012
date



Rebecca Cunningham
Treasurer, PHSOSA

June 1, 2012
date