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## Short Form

## Return of Organization Exempt From Income Tax

OMB No 1545-1150

2011

Open to Public Inspection

Form 990-EZ

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. 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 JUL 1, 2011 and ending JUN 30, 2012

B Check if applicable

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

C Name of organization

ROTARY INTERNATIONAL - BLUEFIELD  
ROTARY CLUB

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

P.O. BOX 121

Room/suite

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

BLUEFIELD, WV 24701

D Employer identification number

55-0268356

E Telephone number

304-325-8157

F Group Exemption

Number 0573

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

I Website: N/A

H Check ☒ If the organization is not required to attach Schedule BJ Tax-exempt status (check only one) — ☐ 501(c)(3) ☒ 501(c)(4) (insert no. ☐ 4947(a)(1) or ☐ 527)

(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.

\$ 56,119.

## 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	
	3	Membership dues and assessments	3	50,011.
	4	Investment income	4	13.
	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	6	
	6a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	6b	Gross income from fundraising events (not including \$ from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	6,095.
6c	Less: direct expenses from gaming and fundraising events	6c	837.	
6d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	5,258.	
7a	Gross sales of inventory, less returns and allowances	7a		
7b	Less: cost of goods sold	7b		
7c	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	55,282.	
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	22,023.
	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	
	16	Other expenses (describe in Schedule O)	16	26,883.
	17	Total expenses. Add lines 10 through 16	17	48,906.
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	6,376.
	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	12,407.
	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	18,783.

LHA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990-EZ (2011)



**ROTARY INTERNATIONAL - BLUEFIELD**

Form 990-EZ (2011)

**ROTARY CLUB**

**55-0268356**

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**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 Sch. O to respond to any question in this Part V ☒ **X**

	Yes	No
<b>33</b> 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		<b>X</b>
<b>34</b> 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)		<b>X</b>
<b>35a</b> 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)?		<b>X</b>
<b>b</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	<b>N/A</b>	
<b>c</b> 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		<b>X</b>
<b>36</b> 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		<b>X</b>
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions. <span style="float:right">▶ <b>37a</b> 0.</span>		
<b>b</b> Did the organization file Form 1120-POL for this year?		<b>X</b>
<b>38a</b> 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? . . .		<b>X</b>
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved	<b>38b</b> N/A	
<b>39</b> Section 501(c)(7) organizations. Enter:		
<b>a</b> Initiation fees and capital contributions included on line 9	<b>39a</b> N/A	
<b>b</b> Gross receipts, included on line 9, for public use of club facilities	<b>39b</b> N/A	
<b>40a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under section 4911 ▶ <b>N/A</b> , section 4912 ▶ <b>N/A</b> ; section 4955 ▶ <b>N/A</b>		
<b>b</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		<b>X</b>
<b>c</b> 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 <span style="float:right">▶ 0.</span>		
<b>d</b> Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization <span style="float:right">▶ 0.</span>		
<b>e</b> 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		<b>X</b>
<b>41</b> List the states with which a copy of this return is filed. ▶ <b>WV</b>		
<b>42a</b> The organization's books are in care of ▶ <b>BRAD FERGUSON</b> Telephone no. ▶ <b>304-431-2252</b> Located at ▶ <b>ONE STAFFORD COMMONS, PRINCETON, WV</b> ZIP + 4 ▶ <b>24740</b>		
<b>b</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 ▶	<b>42b</b>	<b>X</b>
See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>c</b> 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 ▶	<b>42c</b>	<b>X</b>
<b>43</b> 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 <span style="float:right">▶ <b>43</b> N/A</span>		
<b>44a</b> Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	<b>44a</b>	<b>X</b>
<b>b</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	<b>44b</b>	<b>X</b>
<b>c</b> Did the organization receive any payments for indoor tanning services during the year?	<b>44c</b>	<b>X</b>
<b>d</b> If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	<b>44d</b>	
<b>45a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?	<b>45a</b>	<b>X</b>
<b>45b</b> Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)	<b>45b</b>	

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? ☐ Yes ☒ No  
If "Yes," complete Schedule C, Part I 46 ☐ Yes ☒ 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, 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 Sch. C, Part II ☐ Yes ☐ No  
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E ☐ Yes ☐ No  
49a Did the organization make any transfers to an exempt non-charitable related organization? ☐ Yes ☐ No  
b If "Yes," was the related organization a section 527 organization? ☐ Yes ☐ No  
49b

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and 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
N/A				

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." N/A

(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** 11-14-2012  
Signature of officer *R. Brad Ferguson*  
Type or print name and title *R. Brad Ferguson Treasurer*

**Paid Preparer Use Only**  
Print/Type preparer's name \_\_\_\_\_ Preparer's signature \_\_\_\_\_ Date \_\_\_\_\_  
Check ☐ 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	ROTARY INTERNATIONAL - BLUEFIELD ROTARY CLUB	Employer identification number	55-0268356
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FORM 990-EZ, PART I, LINE 4, OTHER INVESTMENT INCOME:

DESCRIPTION OF PROPERTY:	AMOUNT:
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INTEREST INCOME FROM BANK ACCOUNT	13.
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FORM 990-EZ, PART I, LINE 10, GRANTS AND ALLOCATIONS:

ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: ROTARY FOUNDATION

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN:	11,052.
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ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: TOYS FOR TOTS

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN:	115.
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ACTIVITY CLASSIFICATION: EDUCATIONAL

GRANTEE NAME: MERCER COUNTY SCHOOLS - DICTIONARY PROJECT

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN:	360.
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ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: ROTARY PARK

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN:	832.
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ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: COMMUNITY CHRISTMAS TREE

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 134.

ACTIVITY CLASSIFICATION: SCHOLARSHIPS

GRANTEE NAME: BLUEFIELD STATE FOUNDATION

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 2,000.

ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: SALVATION ARMY

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 2,156.

ACTIVITY CLASSIFICATION: SCHOLARSHIPS

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 500.

ACTIVITY CLASSIFICATION: SCHOLARSHIPS

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 500.

ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: PACE LEARNING CENTER

GRANTEE RELATIONSHIP: NONE

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OMB No 1545-0047

**2011**

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Name of the organization

ROTARY INTERNATIONAL - BLUEFIELD  
ROTARY CLUB

Employer identification number  
55-0268356

AMOUNT GIVEN: 350.

ACTIVITY CLASSIFICATION: SCHOLARSHIPS

GRANTEE NAME: BLUEFIELD COLLEGE

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 2,000.

ACTIVITY CLASSIFICATION: SCHOLARSHIPS

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 500.

ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: COMMUNITY FOUNDATION OF THE VIRGINIAS

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 1,100.

ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: BLUEFIELD UNION MISSION

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 126.

ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: AMERICAN RED CROSS

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 158.



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OMB No 1545-0047

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Name of the organization	ROTARY INTERNATIONAL - BLUEFIELD ROTARY CLUB	Employer identification number	55-0268356
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ACTIVITY CLASSIFICATION: CHARITABLE

GRANTEE NAME: CHILD PROTECT

GRANTEE RELATIONSHIP: NONE

AMOUNT GIVEN: 140.

TOTAL INCLUDED ON FORM 990-EZ, LINE 10 22,023.

FORM 990-EZ, PART I, LINE 16, OTHER EXPENSES:

DESCRIPTION OF OTHER EXPENSES:	AMOUNT:
DUES	5,821.
MEETING EXPENSES	19,556.
MISCELLANEOUS	1,506.
TOTAL TO FORM 990-EZ, LINE 16	26,883.

FORM 990-EZ, 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.