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A For the 2012 calendar year, or tax year beginning 01-01-2012, and ending 12-31-2012		
B Check if applicable	C Name of organization FINANCIAL PLANNING ASSOCIATION OF CENTRAL VIRGINIA	D Employer identification number 54-1872365
☐ Address change	Number and street (or P O box, if mail is not delivered to street address) 18563 WILLOUGHBY HTS LANE	E Telephone number (804) 749-8149
☐ Name change	Room/suite	
☐ Initial return		
☐ Terminated		
☐ Amended return	City or town, state or country, and ZIP + 4 ROCKVILLE, VA 23146	F Group Exemption Number ▶
☐ Application pending		

G Accounting Method ☒ Cash ☐ Accrual Other (specify) ▶ _____ I Website: ▶ <u>N/A</u>	H Check ▶ ☒ If the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)
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. **\$ 65,251**

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	0
	2	Program service revenue including government fees and contracts	2	0
	3	Membership dues and assessments	3	19,936
	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	0
	c	Less direct expenses from gaming and fundraising events	6c	0
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d	0
	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	45,315	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ➡	9	65,251	
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	
	13	Professional fees and other payments to independent contractors	13	19,050
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	80
	16	Other expenses (describe in Schedule O)	16	40,427
	17	Total expenses. Add lines 10 through 16 ➡	17	59,557
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	5,694
	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	75,244
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ➡	21	80,938

Part II

Balance Sheets (see the instructions for Part II)

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

	(A) Beginning of year	(B) End of year	
22 Cash, savings, and investments	75,244	22	80,938
23 Land and buildings		23	
24 Other assets (describe in Schedule O)		24	
25 Total assets	75,244	25	80,938
26 Total liabilities (describe in Schedule O)		26	
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	75,244	27	80,938

Part III

Statement of Program Service Accomplishments (see the instructions for Part III)

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 (see the instructions for Part IV)

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

(a) Name and title	(b) Average hours per week devoted to position	(c)Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
WILLIAM LAGOS PRESIDENT	0 00	0		
LISA HATCHER BYLES DIRECTOR	0 00	0		
GRAY GLASS Treasurer	0 00	0		
PETER TOMASCH Director	0 00	0		

Part V

Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V

		Yes	No
33	Did the organization engage in any 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
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	No
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	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	
b	Did the organization file Form 1120-POL for this year?	37b	No
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 GRAY GLASS Telephone no (804) 539-1313 Located at 18563 WILLOUGHBY HTS LANE ROCKVILLE, VA ZIP + 4 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)? 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 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	
		Yes	No
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a	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 only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51

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

		Yes	No
47	Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II		
48	Is the organization a school as 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 title of each employee paid more than \$100,000	(b) 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

f	Total number of other employees paid over \$100,000	
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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.	
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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
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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		2013-05-03 Date				
	GRAY GLASS TREASURER Type or print name and title						
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature MEREDITH A HIERHOLZER	Date 2013-05-06	Check ☒ if self-employed	PTIN		
	Firm's name BOOKKEEPING AND ACCOUNTING SOLUTIONS LLC			Firm's EIN			
	Firm's address 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

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

2012

Open to Public Inspection

Name of the organization FINANCIAL PLANNING ASSOCIATION OF CENTRAL VIRGINIA	Employer identification number 54-1872365
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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 159 FINANCIAL FORUM 45156
Form 990EZ, Part I, Line 16		LICENSES & FEES 25 MILEAGE 355 MISCELLANOUS 369 OFFICE SUPPLIES 241 PROGRAM EXPENSES 5593 SCHOLARSHIPS 930 TAXES 42 TECHNOLOGY 2001 MEMBERSHIP MGMT 18 LEADERSHIP CONFERENCE 2204 FINANCIAL FORUM EXPENSE 28649

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