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## Short Form

## Return of Organization Exempt From Income Tax

OMB No 1545-1150

2013

Department of the Treasury  
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

► Do not enter Social Security numbers on this form as it may be made public.

► Information about Form 990-EZ and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).Open to Public  
Inspection

A For the 2013 calendar year, or tax year beginning June 1 , 2013, and ending December 31 , 20 13

B Check if applicable	C Name of organization <b>Central Indiana Chapter of the Society of CPCU, Inc.</b>		D Employer identification number <b>31-0908122</b>
<input type="checkbox"/> Address change	Number and street (or P O box, if mail is not delivered to street address)	Room/suite	E Telephone number <b>317-428-0286</b>
<input type="checkbox"/> Name change			
<input type="checkbox"/> Initial return			
<input type="checkbox"/> Terminated			
<input type="checkbox"/> Amended return			
<input type="checkbox"/> Application pending			
G Accounting Method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) ►			
I Website: ► <a href="http://www.centralindiana.cpcusociety.org">www.centralindiana.cpcusociety.org</a>	H Check ► <input checked="" type="checkbox"/> if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).		
J Tax-exempt status (check only one) — <input type="checkbox"/> 501(c)(3) <input checked="" type="checkbox"/> 501(c) ( 6 ) ◀ (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527			
K Form of organization: <input type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other			
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, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ ► \$			

## 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	<b>24,960.00</b>
	3 Membership dues and assessments . . . . .	3	<b>10,890.00</b>
	4 Investment income . . . . .	4	<b>1.98</b>
	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		
	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	
	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	<b>25.00</b>
	9 Total revenue. Add lines 1, 2, 3, 4, 5c (b), 7c, and 8 ►	9	<b>35,876.98</b>
Expenses	10 Grants and similar amounts paid (list in Schedule O) . . . . .	10	<b>1,500.00</b>
	11 Benefits paid to or for members . . . . .	11	
	12 Salaries, other compensation and employee benefits . . . . .	12	<b>15,400.00</b>
	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	<b>21,664.64</b>
17 Total expenses. Add lines 10 through 16 ►	17	<b>38,564.64</b>	
Net Assets	18 Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .	18	<b>-2,687.66</b>
	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	<b>77,290.54</b>
	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	<b>74,602.88</b>

**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	77,290.54	22 74,602.88
23 Land and buildings		23
24 Other assets (describe in Schedule O)		24
25 Total assets	77,290.54	25 74,602.88
26 Total liabilities (describe in Schedule O)		26
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	77,290.54	27 74,602.88

**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? Conducting education seminars, classes and events

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.

**Expenses**

(Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others.)

28 Conducted continuing education courses and classes for those in the field of insurance			
(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	28a	3,446.18	
29 Made scholarship awards to university level students as they pursue their CPCU course completion (Gamma Iota Sigma) and sponsored CPCU Society's National Loman Education Foundation			
(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	29a	1,500.00	
30 Conducted monthly and annual meetings and seminars, including featured speakers with relevant insurance related topics for members and other insurance professionals			
(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	30a	18,218.46	
31 Other program services (describe in Schedule O)			
(Grants \$ ) If this amount includes foreign grants, check here ► <input type="checkbox"/>	31a		
32 Total program service expenses (add lines 28a through 31a)	► <input type="checkbox"/>	32	23,164.64

**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 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
Tammy Walker	Executive Director (25)	15,400.00	0.00	0.00
Betsy Binkholder	President			
Ruth Kelly	President-Elect			
Debra Adam	Vice President			
Jon Lough	Secretary			
Jeffery Passage	Treasurer			
Steve Stromquist	Immediate Past President			
Bill Beyers	Director			
Scott Hartman	Director			
Lynetta Leier	Director			
Nancy Natale	Director			

**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 

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 . . . . . Yes  No   
**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) . . . . . Yes  No   
**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)? . . . . . Yes  No   
**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 . . . . . Yes  No   
**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 . . . . . Yes  No   
**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 . . . . . Yes  No   
**36** ✓

37a Enter amount of political expenditures, direct or indirect, as described in the instructions ► **37a** Yes  No   
**b** Did the organization file Form 1120-POL for this year? . . . . . Yes  No   
**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? . . . . . Yes  No   
**b** If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . . Yes  No   
**38b** ✓

39 Section 501(c)(7) organizations. Enter: Yes  No   
**a** Initiation fees and capital contributions included on line 9 . . . . . Yes  No   
**39a** ✓

**b** Gross receipts, included on line 9, for public use of club facilities . . . . . Yes  No   
**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 ► \_\_\_\_\_ Yes  No   
**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 . . . . . Yes  No   
**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 . . . . . Yes  No   
**40c** ✓

**d** Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization . . . . . Yes  No   
**40d** ✓

**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 . . . . . Yes  No   
**40e** ✓

41 List the states with which a copy of this return is filed ► **Indiana** Yes  No

42a The organization's books are in care of ► **Jeffery Passage** Telephone no. ► **317-441-5989** Yes  No   
 Located at ► **18971 Fairfield Boulevard, Noblesville, IN** ZIP + 4 ► **46060-1553** Yes  No   
**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: ► Yes  No   
 See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts**. Yes  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: ► Yes  No   
**42b** ✓

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 . . . . . Yes  No   
**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 . . . . . Yes  No   
**44b** ✓

**c** Did the organization receive any payments for indoor tanning services during the year? . . . . . Yes  No   
**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 . . . . . Yes  No   
**44d** ✓

45a Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . . Yes  No   
**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) . . . . . Yes  No   
**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

**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**

		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	47	
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a	
b	If "Yes," was the related organization a section 527 organization?	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."		

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 business address of each independent contractor	(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.

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.

<b>Sign Here</b>	 Signature of officer <b>Jeffery Passage, Treasurer</b> <small>Type or print name and title</small>	 Date
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<b>Paid Preparer Use Only</b>	Print/Type or print name and title			
	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed
	Firm's name ►	Firm's EIN ►		
Firm's address ►	Phone no.			

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

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Form 990-EZ (2013)