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Form **990-EZ** 

# **Short Form Return of Organization Exempt From Income Tax**

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

2013

OMB No. 1545-1150

▶ Do not enter Social Security numbers on this form as it may be made public. Department of the Treasury Internal Revenue Service

▶ Information about Form 990-EZ and its instructions is at www.irs.gov/form990.

Open to Public Inspection

A F	or the	2013 calend	ar year, or tax year beginning , 2013	, and ending	_		, 20
В	heck if ap	oplicable	C Name of organization		D Emp	loyer ide	entification number
	Address c	change	Mohawk Valley Institute for Learning in Retirement		į.	84	4-1629435
	Name cha	nge	Number and street (or P O box, if mail is not delivered to street address)	Room/suite	E Teler	phone nu	umber
7	initial retui		100 Seymour Road			31	5-792-7292
=	Terminate		City or town, state or province, country, and ZIP or foreign postal code		F Gro	up Exer	mption
=	Amended Annlicatio	return n pending	Utica, New York 135012		Nur	nber ▶	•
1		ting Method:	✓ Cash	Н	Check	<b>▶</b> □ (	f the organization is <b>not</b>
	Vebsite		sunyit.edu/mvilr				ach Schedule B
			eck only one) — ✓ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1)	or 527	(Form 9	90, 990	)-EZ, or 990-PF).
			☐ Corporation ☐ Trust ☐ Association ☐ Other	<u> </u>	····		
LA	dd line	s 5b. 6c. and	7b, to line 9 to determine gross receipts. If gross receipts are \$200,000 c	r more, or if tot	al assets	;	
(Pa	rt II. col	umn (B) belov	w) are \$500,000 or more, file Form 990 instead of Form 990-EZ.			<b>▶</b> s	
	art I		e, Expenses, and Changes in Net Assets or Fund Balan			ctions	for Part I)
	ai t i		the organization used Schedule O to respond to any question				
	1		ons, gifts, grants, and similar amounts received		<del></del>	11	30,578
	2		ervice revenue including government fees and contracts		• •	2	2,675
	3	_	ip dues and assessments		• •	3	92,744
	1		•		• •	4	4838
	4	Investment income					4030
	5a	Less: cost	<u> </u>	1			
	b	Cein er (le	5c				
	C	Gain or (lo		<del>                                     </del>			
•	6	Cross iss					
	a	\$15 000)		1 1			
Revenue		\$15,000j	ome from gaming (attach Schedule of greater than	ns			
e Ve	b	Gross inco	ime from fundraising events (not incupally us				
Œ	1	from fundi	aising events reported on line 1) (affact Schedule G if the charge gross income and contributions exceeds \$15,000)	1	4075		
æ					1275	1	
	5	Less: direc	et expenses from gaming and fundralsing events <u>60</u> e or (loss) from gaming and fundraising events (add lines 6a a		1578	1 1	
	a	line 6c)	Duaci	6d	(000)		
		•	7		• •	- Ou	(303)
	7a		s of inventory, less returns and allowances	<del></del>		1 1	
	b		or goods cold	<u> </u>		7c	
	C	•	it or (loss) from sales of inventory (Subtract line 7b from line 7a)		• •	8	
	8		nue (describe in Schedule O)			9	400 500
_	9		nue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8			10	130,532
	10		d similar amounts paid (list in Schedule O)			11	1,000
	11	•	aid to or for members			12	14,632
Ses	12		ther compensation, and employee benefits			13	7, 444
Ë	13		al fees and other payments to independent contractors			<del></del>	75,000
Expense	14	•	y, rent, utilities, and maintenance			14	
Ш	15		ublications, postage, and shipping			15	3,525
	16		enses (describe in Schedule O)			16	6,250
	17	Total expe	enses. Add lines 10 through 16	<u> </u>	. >	17	100,407
23	18		(deficit) for the year (Subtract line 17 from line 9)			18	30,125
88	19		s or fund balances at beginning of year (from line 27, column (				
Ą		-	ar figure reported on prior year's return)			19	84,764
Net Assets	20		nges in net assets or fund balances (explain in Schedule O)			20	
_	21		or fund balances at end of year. Combine lines 18 through 20		. ▶	21	114,889
For	Pener	work Beduct	tion Act Notice, see the separate instructions.	at. No 10642I			Form <b>990-EZ</b> (2013)

, ar t	instructions for Part V) Check if the organization used Schedule O to respond to any question in this			
	mediation for that ty officer in the organization ascal confedure of to respond to any question in this	rait	Yes	
	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	1.55	<b>√</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)	24		
	Did the organization have unrelated business gross income of \$1,000 or more during the year from business	34	╁	<b>✓</b>
	activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a	1	1
	If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O 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	35b		1
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	35c		1
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a	-	<del>                                     </del>	<b>V</b>
	Did the organization file Form 1120-POL for this year?	37b		1
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were			
<b>.</b>	any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a	ļ	<b>✓</b>
ь 39	If "Yes," complete Schedule L, Part II and enter the total amount involved 38b Section 501(c)(7) organizations. Enter:	-		
	Initiation fees and capital contributions included on line 9		]	
	Gross receipts, included on line 9, for public use of club facilities	1		]
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ ; section 4912 ▶ ; section 4955 ▶			
	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		1
С	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	100		
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization			
е	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		1
41	List the states with which a copy of this return is filed ▶ None			
42a		315-79		1
b	Located at ► 100 Seymour Road, Utica, NY ZIP + 4 ► At any time during the calendar year, did the organization have an interest in or a signature or other authority over	13	502	1 80-
	a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	_	No
	If "Yes," enter the name of the foreign country: ▶	TEU	<del> </del>	_
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.			
С	At any time during the calendar year, did the organization maintain an office outside the U.S.?	42c		1
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		. 1	▶ □
			Yes	No
	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a		1
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	<del> </del>	1
С	Did the organization receive any payments for indoor tanning services during the year?	440 44c	<del> </del>	<b>✓</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	44d		-
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		1
	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)			,

Form 990-	-EZ (20	13)						ı	Page 4
								Yes	No
<b>46</b> t	Did th to car	e organization engage, directly or ir ididates for public office? If "Yes," o	ndirectly, in political c complete Schedule C	ampaign activities o , Part I	n behalf o	of or in opposit	tion 46	3	1
Part V		Section 501(c)(3) organizations	only			·	·		<u>v</u>
		All section 501(c)(3) organization 50 and 51.	s must answer que	stions 47-49b and	152, and	complete th	e tables	for lin	es
	(	Check if the organization used Sci	hedule O to respond	I to any question in	this Part	<u>VI</u>			<u>. C</u>
47 1	U: 4 +L		a all data and bases					Yes	No
3	year?	If "Yes," complete Schedule C, Par	tll				. 47	,	✓
				•					<b>/</b>
									<b>↓</b> ✓
									l nd ke
	emplo	eyees) who each received more than	1 \$100,000 of comper	e O to respond to any question in this Part VI					
		Name and title of each employee		(c) Reportable compensation	(d) H contribut benefit p	ealth benefits, tions to employee lans, and deferred	(e) Estima	ited amo	ount of
None			<del></del>		1	·			
					<del> </del>			<del></del>	
								~ <del>~~</del>	
					<u> </u>				
f	Total	number of other employees paid ov	er \$100.000	. ▶					
51	Comp		's five highest comp	ensated independen	t contrac	tors who each	receive	d more	e tha
		Name and business address of each independ		T	rvice	(c)	Compens	ation	
None									
		·		1		ŀ			
<u>d</u> .	Total	number of other independent contri	actors each recoiving	Over \$100,000					
						47(a)(1)		<del></del> -	
		empt charitable trusts must attach					► 🗆 Ye	s 🗌	No
Under per true, com	nalties ect, and	of perjury, I declare that I have examined this discomplete. Declaration of preparer (other that	return, including accompar n officer) is based on all info	rying schedules and stater	nents, and t	to the best of my ki	nowledge a	nd belief	, it is
Sign		Signature of officer	Krish			Date / 26	120-	//	
Here		Type or print name and title	roupe		ions 47–49b and 52, and complete the table of any question in this Part VI	1001	7		
<u></u>		Print/Type preparer's name	Preparer's signature		Date		PIIN		
Paid Prepa	rer	) Pro Proposition of June 10					rf		
Use C		Firm's name ▶				Firm's EIN ▶			

Firm's address ▶

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

. ▶ ☐ Yes ☐ No

Phone no.

#### SCHEDULE A (Form 990 or 990-EZ)

### **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

2013

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

➤ Attach to Form 990 or Form 990-EZ.
➤ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

Name	of the organization							mployer id	entification	numb	er	
	wk Valley Institute f			-1			4-1		84-162		·	
Par			ity Status (All organ						nstructio	ns.	<del> </del>	····
The c 1 2	A church, conv	ention of church	tion because it is: (For nes, or association of 170(b)(1)(A)(ii). (Attac	churches	describe				<b>).</b>			
3			pital service organiza			ection 1	70(b)(1)(	A)(iii).				
4	A medical rese		n operated in conjunc						(b)(1)(A)(	(III). E	nter the	
5	An organization		he benefit of a collec	ge or univ	ersity ov	vned or o	perated	by a gov	vernment	al un	it descril	bed in
6 7	An organization	n that normally	nment or governmenta receives a substantia (A)(vi). (Complete Part	I part of i	scribed in its suppo	section rt from a	<b>170(b)(1</b> governm	)(A)(v). nental un	it or from	n the	general	public
8	☐ A community t	rust described in	section 170(b)(1)(A)	(vi). (Con	nplete Pa	rt II.)						
9	receipts from support from	activities related gross investme	receives: (1) more that I to its exempt functi nt income and unrel fter June 30, 1975. Se	ions—sub ated bus	oject to c siness tax	ertain ex cable inc	ceptions ome (les	, and (2) is section	no more	thar	1 <b>33</b> 1/3%	of its
10 11	An organization	n organized an ne or more pub	operated exclusively doperated exclusive licly supported organites the type of second exceptions.	ely for the	e benefit described	of, to p	erform t on 509(a	the funct 1)(1) or se	ions of, o ection 509	9(a)(2	). See se	ut the
	<u></u>											a a a
0	a  Type I  By checking the other than four or section 509	ndation manage	II c ☐ Type III that the organization rs and other than one	is not cor	ntrolled d	irectly or	indirecth	y by one	ion-funct or more d lescribed	disqu	alified pe	ersons
f		ation received a	written determination	on from t	the IRS t	hat it is	a Type	I, Type I	ll, or Typ	e ill	supporti	ing
g	•	17, 2006, has ti	he organization accer	oted any	gift or co	ontributio	n from a	ny of the				
			ndirectly controls, eithody of the supported o			her with		describe	d in (ii) ar 		Yes	No
	(ii) A family m	ember of a perso	on described in (i) abo	ve?						1	1g(ii)	
	• •	•	a person described in		above?.					1	1g(iii)	
h			on about the support									
(I)	Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	in col. (i) lis	organization sted in your document?	the organ	ou notify nization in of your port?	organiza (i) organi	Is the tion in col. ized in the S.?	(vii) A	mount of m support	
		l		Yes	No	Yes	No	Yes	No	L		
(A)												
(B)												
(C)												
(D)												
(E)	<del>,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,</del>	,										
	·		* * * * * * * * * * * * * * * * * * * *		,	,						<del></del>

Schedule	A (Form 990 or 990-EZ) 2013						Page 2
Part	Support Schedule for Organiza (Complete only if you checked the	e box on line	5, 7, or 8 of	Part I or if the	organization	n failed to qua	
	Part III. If the organization fails to	qualify unde	r the tests lis	ted below, pl	ease comple	te Part III.)	
	on A. Public Support						
Calend	dar year (or fiscal year beginning in) ▶	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	89705	95411	117307	107959	123322	533704
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3	The value of services or facilities furnished by a governmental unit to the organization without charge						
4	Total. Add lines 1 through 3	89705	95411	117307	107959	123322	533704
5	The portion of total contributions by each person (other than a governmental unit or publicly		, , , , , , , , , , , , , , , , , , , ,				
	supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
	Public support. Subtract line 5 from line 4.	1 - 4 2 2	<del>}                                    </del>				533704
6 Section	on B. Total Support	<u>`</u>	7	l			333704
	dar year (or fiscal year beginning in)	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	(e) 2013	(f) Total
7	Amounts from line 4	89705	95411	<del></del>	107959	123322	533704
8	Gross income from interest, dividends,	00700			10,000		
J	payments received on securities loans, rents, royalties and income from similar sources				2504	4020	7242
9	Net income from unrelated business activities, whether or not the business is regularly carried on				2504	4838	7342
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11	Total support. Add lines 7 through 10	` , , , , ,					541046
12	Gross receipts from related activities, etc	. (see instruction	ons)			12	
13	First five years. If the Form 990 is for the	ne organizatior	n's first, secon	d, third, fourth	, or fifth tax ye	ear as a sectio	n 501(c)(3)
	organization, check this box and stop he			· · · · ·			· · <b>&gt;</b> 🗆
Secti	on C. Computation of Public Support					<del>, ,</del>	
14	Public support percentage for 2013 (line					14	98 %
15	Public support percentage from 2012 Sci	hedule A, Part	II, line 14 .			15	96 %
16a	331/3% support test—2013. If the organibox and stop here. The organization qua	lifies as a publ	icly supported	l organization			. 🕨 🗹
Þ	331/s% support test—2012. If the organ	ization qualifie	s as a publicly	supported org	janization .		. ▶ ☑
17a	10%-facts-and-circumstances test—2 10% or more, and if the organization me Part IV how the organization meets the "lorganization	ets the "facts- facts-and-circu	and-circumsta	ances" test, che st. The organiza	eck this box ar	nd stop here. E	xplain in
b	10%-facts-and-circumstances test—2 15 is 10% or more, and if the organiza Explain in Part IV how the organization in	tion meets the	facts-and-c	ircumstances"	test, check th	nis box and <b>st</b> o	op here.

Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see

, Schedul	e A (Form 990 or 990-EZ) 2013						Page 3
Part	Support Schedule for Organiza				<del>'</del>		
	(Complete only if you checked the lf the organization fails to qualify						ier Part II.
	on A. Public Support			<del> </del>			
Calen	dar year (or fiscal year beginning in) 🕨	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	<b>(e)</b> 2013	(f) Total
1	Gifts, grants, contributions, and membership fees						
_	received. (Do not include any "unusual grants.")	·····				<del> </del>	
2	Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3	Gross receipts from activities that are not an unrelated trade or business under section 513						
4	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5	The value of services or facilities furnished by a governmental unit to the organization without charge						
6	Total. Add lines 1 through 5						
7a	Amounts included on lines 1, 2, and 3 received from disqualified persons .						
b	Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
C	Add lines 7a and 7b			7- 11 710 1			
8	Public support (Subtract line 7c from line 6.)						
	on B. Total Support						
Calen	dar year (or fiscal year beginning in) 🕨	(a) 2009	<b>(b)</b> 2010	(c) 2011	(d) 2012	<b>(e)</b> 2013	(f) Total
9	Amounts from line 6					<u></u>	
10a	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources.						
b	Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
C	Add lines 10a and 10b						
11	Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)				``		
13	<b>Total support.</b> (Add lines 9, 10c, 11, and 12.)						
14	First five years. If the Form 990 is for the organization, check this box and stop here	-			n, or fifth tax y		
Sect	on C. Computation of Public Suppor			<del> </del>	•		
15	Public support percentage for 2013 (line 8			13, column (fl)		15	%
16	Public support percentage from 2012 Sch		•			16	91
	ion D. Computation of Investment In						
17	Investment income percentage for 2013 (			ov line 13. colu	mn (f)	17	9/

Investment income percentage from 2012 Schedule A, Part III, line 17 . . . . . . . . . . . . . . . .

19a 33¹/3% support tests—2013. If the organization did not check the box on line 14, and line 15 is more than 33¹/3%, and line 17 is not more than 33¹/3%, check this box and stop here. The organization qualifies as a publicly supported organization . ▶

33¹⅓% support tests—2012. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33¹⅓%, and line 18 is not more than 33¹⅓%, check this box and stop here. The organization qualifies as a publicly supported organization ▶ Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶

18

18

%

Schedule A (F	-om 990 or 990-E <i>2</i> ) 2013	Page 4
Part IV	Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; a Part III, line 12. Also complete this part for any additional information. (See instructions).	and
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••••••••		

#### **SCHEDULE O** (Form 990 or 990-EZ)

### 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.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

► Attach to Form 990 or 990-EZ. ▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open to Public Inspection Employer Identification number

Mohawk Valley Institute for Learning in Retirement	84-1629435
Line 16 Other Expenses	
Supplies 1857	
Telephone 1208	
Travel 715	••••••
Office 1553	
Conference 40	
Honorarium 500	
Misc 100	
***************************************	
	·
•	
	·····

Last Name	First Name			Hours per week	0	Health Benefits	Est. Other Compensation
Mason	Marsha	Board Pres	Exec. Board (P)	5	0	0	0
Capozzella	Fred	Board 1st VP	Exec. Board (1st VP)	3	0	0	0
Fuchs	Carol	Board Sec	Exec. Board (S)	2	0	0	0
Capozzella	Kathleen	Board Asst Sec	Exec. Board (AS)	1	0	0	0
Lloyd	Kathleen	Board Treasurer	Exec. Board (T)	1	0	0	0
Montague	Carolyn	Board Asst Treas	Exec. Board (AT)	1	0	0	0
Bamberger	Henry	Board 2nd VP	Exec. Board (2nd VP)	1	0	0	0
Kwasniewski	Joan	Board 2015	Exec. Board ( C)	1	0	0	0
Blatt	Sidney	Board 2016		1	0	0	0
Donachie	Cynthia	Board 2015		1	0	0	0
Endy	Theodore ·	Board 2016		1	0	0	0
Friedman	Elliott	Board 2015		1	0	0	0
Kelly	Ann (Nancy)	Board 2016		1	0	0	0
Sanderson	Bonnie	Board 2015		2	0	0	0
Schrader	Lee	Board 2014		1	0	0	0
Stone	Ann	Board 2015		2	0	0	0
Wilson	Marian Giunta	Board 2015		1	0	0	0
Stookey	Beth			2	0	_0	0
Winberg	Harry	Board 2016		3	0	0	0
Zogby	Mary Ann	Board 2015		2	0	0	0
Henry	Lynn	Board 2016		3	0	0	0
Dubner	Nancy	Board Emeritus		0	0	0	0
Max	Theodore	Board Emeritus		0	0	0	0