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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)

OMB No 1545-1150 **2014** 

Open to Public Inspection

Department of the Treasury Internal Revenue Service 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.

	For the	e 2014 calendar year, or tax year beginning 07/01/14, and ending 06/30/15			
В		applicable C Name of organization	D Emple	oyer identification number	
	Address	I			
	Name ch	ROTARY CLUB OF WALLINGFORD	06-6068955		
П	Initial retu	1		none number	
П	Final retu	urn/terminated P O BOX 213		3-265-0488	
	Amended	d return City or town, state or province, country, and ZIP or foreign postal code		o Exemption	
	Application	on pending WALLINGFORD CT 06492	Numl	per 🕨	
G	Accour	nting Method X Cash Accrual Other (specify) ▶ H Check	< <b>▶</b> X	if the organization is not	
ı	Websi	a= /=		ich Schedule B	
J	Tax-exe	empt status (check only one) — 501(c)(3) X 501(c) ( 4 ) 4 (insert no ) 4947(a)(1) or 527 (Form	990, 990	)-EZ, or 990-PF)	
K	Form o	of organization: X Corporation Trust Association Other			
L	Add line	es 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets			
(Pa	rt II, colu	mn (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ	▶ \$	50,959	
F	art I	Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instruction	ons for F		
		Check if the organization used Schedule O to respond to any question in this Part I		X	
	1	Contributions, gifts, grants, and similar amounts received	1	6,898	
	2	Program service revenue including government fees and contracts	2		
	3	Membership dues and assessments SEE STATEMENT	3	10,903	
	4	Investment income	4	1	
	5a	Gross amount from sale of assets other than inventory 5a	-		
	Ь	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			
n de		\$15,000)	$\dashv$ $\mid$		
Revenue	b	Gross income from fundraising events (not including \$ of contributions			
œ		from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)  [6b]  33,15	7		
		sum of such gross income and contributions exceeds \$15,000)  Less direct expenses from gaming and fundraising events  6c 24,13			
	d d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract	~		
	"	line 6c)	6d	9,025	
	7a	Gross sales of inventory, less returns and allowances 7a	- Ou	3,023	
	b	Less cost of goods sold 7b	7		
	C	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		
	8	Other revenue (describe in Schedule O)	8	· · · · · · · · · · · · · · · · · · ·	
2	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	26,827	
	10	Grants and similar amounts paid (list in Schedule O)	10	28,070	
5	11	Benefits paid to or for members	11		
s	12	Salaries, other compensation, and employee benefits    Compensation   Compensatio	12		
Expenses	13	Professional fees and other payments to independent contractors	13		
בַּ בֿ	14		14		
jω	15	Printing, publications, postage, and shipping	_15		
3	16	Other expenses (describe in Schedule O)	16	7,908	
<del>-</del>	17	Total expenses. Add lines 10 through 16	17	35,978	
) <sub>10</sub>	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18		
Assets	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with	1	<u> </u>	
As		end-of-year figure reported on prior year's return)	19	14,744	
Net	20	Other changes in net assets or fund balances (explain in Schedule O)	20		
	21 Paper	Net assets or fund balances at end of year. Combine lines 18 through 20	21	5,593	

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990-EZ** (201





Part II	Balance Sheets (see the instructions for F	·				
	Check if the organization used Schedule O to	o respond to any			т —	(5) 5
			(A) Be	ginning of year	<del> </del>	(B) End of year
	avings, and investments			14,744	<del> </del>	5,593
23 Land ar	_			0	<del> </del> -	
	ssets (describe in Schedule O)			0		F 500
25 Total a				14,744	1	5,593
	abilities (describe in Schedule O)			14 744		
<del></del>	sets or fund balances (line 27 of column (B) must agre			14,744	27	5,593
Part III	Statement of Program Service Accom	•		´ (T)		_
	Check if the organization used Schedule O to	o respond to any	question in this Part III	<u> </u>	<b>∤</b>	Expenses
	organization's primary exempt purpose?				l '	quired for section
	EDULE O				I	(c)(3) and 501(c)(4)
	e organization's program service accomplishments for e				1	anizations, optional for
	d by expenses. In a clear and concise manner, describe	•	ea, the number of		othe	ers)
	nefited, and other relevant information for each program			<del></del>	<del>                                     </del>	· · · · · · · · · · · · · · · · · · ·
	PROVIDE THE MEMBERSHIP THE ABILITY TO SUPP					
LOCA	L, NATIONAL AND INTERNATIONAL COMMUNITIES	3.				
	21 201			<u> </u>		00 043
(Grants	\$ 21,801) If this amount includes	foreign grants, chec	k here	<b>•</b>	28a	29,043
29					1 1	
					1 1	
(Grants	\$ ) If this amount includes	foreign grants, chec	k here	<b>&gt;</b>	29a	<del> </del>
30						
				ہمم		
(Grants		foreign grants, chec	k here	<u> </u>	30a	
31 Other p	rogram services (describe in Schedule O)				1 1	
(Grants			k here	<b>&gt;</b>	31a	
	rogram service expenses (add lines 28a through 31a)			<u> </u>	32	29,043
Part IV	List of Officers, Directors, Trustees, and Key E Check if the organization used Schedule O to response	<b>mployees</b> (list each and to any question	one even if not compens in this Part IV	sated — see the ii	nstructio	ons for Part IV)
	Check if the organization adda deriodate of to respec	(b) Average	(c) Reportable	(d) Heath ben	efits,	1
	(a) Name and title	hours per week	compensation (Forms W-2/1099-MISC)	contributions to e benefit plans,	mployee	(e) Estimated amount of other compensation
		devoted to position	(if not paid, enter -0-)	deferred compe		other compensation
MICHEI	LE MCHUGH					
PAST I	PRESIDENT	2.00	0		0	0
JOHN N	MATTINGLY					
SECRET	TARY	4.00	0		0	0
JOHN N	MEZZANOTTE					
PRESI	DENT	4.00	0		0	0
JOHN N	ACGUIRE					
VICE F	PRESIDENT	2.00	o		0	0
MARK I	DAVIS					
PAST I	PRESIDENT	2.00	0		0	l 0
LORI	COOKE-MARRA					
TREASU	JRER	2.00	0	]	0	l
						<del>-</del>
				į		
		1				
		†				
		<del></del>				<del>                                     </del>
		<u> </u>	L	<u> </u>		- 000 F7

Form 990-EZ (2014)

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ra	a	e	

P	Part Y Other Information (Note the Schedule A and personal benefit contract statement requirements in instructions for Part V) Check if the organization used Schedule O to respond to any question in this			
	" The residence of the residence of the respond to any question in this		Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a			l
	detailed description of each activity in Schedule O	33	<u>↓</u>	X
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	1	ĺ	
05-	change on Schedule O (see instructions)	34	<del> </del>	X
35a	Did the organization have unrelated business gross income of \$1,000 or more during the year from business	105-		x
ь	activities (such as those reported on lines 2, 6a, and 7a, among others)?  If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O	35a 35b	┢	<del>  ^</del>
C		330	$\vdash$	<del>                                     </del>
·	reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III	35c	i	x
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets	330		<del> </del>
-	during the year? If "Yes," complete applicable parts of Schedule N	36		x
37a				
b		37b		x
38a				
	any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved [38b]			
39	Section 501(c)(7) organizations. Enter.	:		1
а	Initiation fees and capital contributions included on line 9			
b	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	•		1
	section 4911 ▶, section 4912 ▶, section 4955 ▶			
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) 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		X
С	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax imposed			
	on organization managers or disqualified persons during the year under sections 4912,			1
	4955, and 4958			
d				1
	40c reimbursed by the organization	<del></del> [		İ
е			1	
	transaction? If "Yes," complete Form 8886-T  List the states with which a copy of this return is filed   NONE	_40e_	نـــــا	X
41		<b>▶</b> 203-26	5-0	100
42a	The organization's books are in care of ► LORI COOKE - MARRA  P.O. BOX 213  Telephone no.	203-20	5-0	400
	Located at WallingFord CT ZIP + 4 D	06492		
b		00152	Yes	No
-	a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	163	X
	If "Yes," enter the name of the foreign country	425		
	See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and			Í
	Financial Accounts (FBAR)			
С	At any time during the calendar year, did the organization maintain an office outside the U.S?	42c		X
	If "Yes," enter the name of the foreign country ▶			
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			ļ
	completed instead of Form 990-EZ	44a	igsqcup	X
ь	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be			ļ
	completed instead of Form 990-EZ	44b		X
C	Did the organization receive any payments for indoor tanning services during the year?	44c	<b>  </b>	X
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		İ
4.5			$\vdash\vdash\vdash$	37
45%		45a	$\vdash$	X
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the			ĺ
	meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of	[		v
	Form 990-EZ (see instructions)	45b		<u> </u>

	390-EZ (2014) ROTARY CLUB OF WALLII	NGFORD		06-60	68955				Р	age 4
40	<b>5</b>						Г		Yes	No
46	Did the organization engage, directly or indirectly, in political c to candidates for public office? If "Yes," complete Schedule C,	. •	n behalf of o	or in oppositio	n			46	1	X
Pa	rt VI Section 501(c)(3) organizations only All section 501(c)(3) organizations must answ		-49b and 5	2, and comp	olete the ta	bles for line	es			
	50 and 51 Check if the organization used Schedule O to	respond to any	question in	this Part VI						
<del></del>	Did the organization engage in lobbying activities or have a se	ection 501(h) electio	n in effect di	uring the tax					Yes	No
••	year? If "Yes," complete Schedule C, Part II	, , , , , , , , , , , , , , , , , , , ,	ir iir chicot di	aring the tax				47		
48	Is the organization a school as described in section 170(b)(1)(	. , ,	•	lule E				48		
49a	Did the organization make any transfers to an exempt non-cha	-	nization?				}-	49a		
b 50	If "Yes," was the related organization a section 527 organization. Complete this table for the organization's five highest compen		ther than off	ficers director	s trustees :	and kev	Ľ	49b	1	
	employees) who each received more than \$100,000 of compe					•				
	(a) Name and title of each employee	(b) Average hours per week devoted to position	comp	portable ensation 2/1099-MISC)	contributions benefit p	n benefits, to employee lans, and empensation	(e) Est		d amou pensati	
			<u> </u>	···-						
									_	
							<del> </del>		_	
					-					
	<del></del>		<u> </u>				L			
f 51	Total number of other employees paid over \$100,000 Complete this table for the organization's five highest compen-	cated independent	contractors v	who each roce	wood more t	han				
	\$100,000 of compensation from the organization. If there is no			wild each rece		iaii				
	(a) Name and business address of each independent cont	ractor		(b) Type	e of service		(c) Co	mpen	sation	
	<del>-</del>									
	<del>-</del>									
			]			1				
		****			···-					
d 52	Total number of other independent contractors each receiving Did the organization complete Schedule A? Note. All section 5	•	ne must att	ach a					_	
	completed Schedule A	oo i(c)(o) organizatio		acria		•	.	Yes	□ ;	٧o
	r penalties of perjury, I declare that I have examined this return, including					y knowledge a	and belief	i, it is		
true, c	correct, and complete Declaration of preparer (other than officer) is bas	sed on all information of	of which prepa	arer has any kno	owledge	1.				
Sign	Signature of officer			Dai	1 2 1 4 te	112	<del></del>			
Here			TI	REASURE	R					
	Type or pnnt name and title  Pnnt/Type preparer's name  Pre	eparers of gradure	$\overline{Y}$		Date		$\overline{\Box}$	PTIN		
Paid		1. Kinh	/ <del>/</del>	- CPA	'	Check	f		<b></b>	
	ELIER B. DAVIS	PHILLIPS,	LLC		11/2	3/15   <sup>seii-eii</sup> Firm's EIN ▶			01047 <b>724</b> :	
_	Only Firm's address 1062 BARNES RD.,	STE 203				. =		<u>- •</u>		
		06492-257	6			Phone no 2	03-2			_
May	the IRS discuss this return with the preparer shown above? Se	e instructions					<u> </u>			No
							Form	ソコラ	)-EZ	2014)

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

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

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Department of the Treasury
Internal Revenue Service

▶ Information about Schedule G (Form 990 or 990-EZ) and its instructions is at www irs gov/form990

ROTARY CLUB OF WA	ALL TROPOD			D6-6068	
Fundraising Activities Complete		n answere	ed "Yes" to Form 9		
Part I Form 990-EZ filers are not require				50, 1 art 10, mic	
1 Indicate whether the organization raised funds through	n any of the following a	ctivities Che	eck all that apply		
a Mail solicitations	e Solicitation	of non-gove	rnment grants		
<b>b</b> Internet and email solicitations	f Solicitation	of governme	ent grants		
c Phone solicitations	g Special fun	draising eve	nts		
d In-person solicitations					
<ul> <li>Did the organization have a written or oral agreement or key employees listed in Form 990, Part VII) or entity</li> <li>If "Yes," list the ten highest paid individuals or entities compensated at least \$5,000 by the organization</li> </ul>	y in connection with pro	ofessional fu to agreemei	ndraising services?	draiser is to be	Yes No
(1) Name and address of advantual		(III) Did fund- raiser have	(tra) Construction	(v) Amount paid to	(vi) Amount paid to
(i) Name and address of individual or entity (fundraiser)	(ii) Activity	custody or control of	(Iv) Gross receipts from activity	(or retained by) fundraiser listed in	(or retained by) organization
		contributions?		col (i)	
		Yes No			
1					
2					
3					
4					
5					
6					
7					
.8					
9					
10					
Total	1	<b></b>			
3 List all states in which the organization is registered or	licensed to solicit con	tributions or	has been notified it is e	xempt from	

registration or licensing

Schedule G (Form 990 or 990-EZ) 2014 ROTARY CLUB OF WALLINGFORD 06-6068955 Page 2 Fundraising Events. Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000. (a) Event #1 (b) Event #2 (c) Other events (d) Total events VARIOUS FUNDRAI NONE (add col (a) through col (c)) (event type) (event type) (total number) 33,157 33,157 1 Gross receipts 2 Less. Contributions 3 Gross income (line 1 minus 33,157 33,157 line 2) 4 Cash prizes 5 Noncash prizes 6 Rent/facility costs **Direct Expenses** 7 Food and beverages 8 Entertainment 24,132 24,132 9 Other direct expenses 24,132 10 Direct expense summary Add lines 4 through 9 in column (d) 11 Net income summary Subtract line 10 from line 3, column (d) Gaming. Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more Part III than \$15,000 on Form 990-EZ, line 6a. (b) Pull tabs/instant (d) Total gaming (add (a) Bingo (c) Other gaming bingo/progressive bingo col (a) through col (c)) 1 Gross revenue 2 Cash prizes Direct Expenses 3 Noncash prizes 4 Rent/facility costs 5 Other direct expenses Yes % Yes % Yes % 6 Volunteer labor No 7 Direct expense summary Add lines 2 through 5 in column (d) 8 Net gaming income summary Subtract line 7 from line 1, column (d) Enter the state(s) in which the organization conducts gaming activities Yes No Is the organization licensed to conduct gaming activities in each of these states? If "No," explain Yes No 10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? b If "Yes," explain.

		• • •		
Sche	dule G (Form 990 or 990-EZ) 2014 ROTARY CLUB OF WALLINGFORD	06-606895	5	Page 3
11	Does the organization conduct gaming activities with nonmembers?		Ye	
12	Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity			٠
	formed to administer charitable gaming?		Ye	s No
13	Indicate the percentage of gaming activity conducted in:			<u> </u>
a	The organization's facility	13a	1	%
b	An outside facility	13b		<del></del>
14	Enter the name and address of the person who prepares the organization's gaming/special events books and			
•	records:			
	Name ►			
	Address ▶			
15a	Does the organization have a contract with a third party from whom the organization receives gaming			
	revenue?		Ye	s 💹 No
þ	If "Yes," enter the amount of gaming revenue received by the organization > \$	and the		
	amount of gaming revenue retained by the third party ▶ \$			
С	If "Yes," enter name and address of the third party			
	Name ▶			
	Address ▶			
16	Gaming manager information			
	Name ►			
	Gaming manager compensation ▶ \$			
	Description of services provided ▶			
	Director/officer Employee Independent contractor			
17	Mandatory distributions			
а	Is the organization required under state law to make charitable distributions from the gaming proceeds to			
	retain the state gaming license?		Ye	s 🗌 No
ь	Enter the amount of distributions required under state law to be distributed to other exempt organizations or			
	spent in the organization's own exempt activities during the tax year ▶ \$			
Par				-
	instructions).		,000	
		· · · · · · · · · · · · · · · · · · ·		

**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

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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.

Name of the organization

Employer identification number

ROTARY CLUB OF WALLINGFO	06-6068955							
FORM 990-EZ, PART I, LINE 10 - PAYMENTS TO AFFILIATES								
NAME AND ADDRESS	PURPOSE	AMOUNT						
DISTRICT ROTARY	DUES	\$ 2,135						
INTERNATIONAL ROTARY	DUES	\$ 4,134						
FORM 990-EZ, PART I, LINE 10 - GRAN	TS/SIMILAR AMTS PAID T	O ORGANIZATIONS						
NAME AND ADDRESS	CLASS OF ACTIVITY	DATE OF GIFT						
	DESC. OF PROPERTY							
	CASH CONTRIB. NONCASH	CONTRIB.						
	BOOK VALUE BV EXPL	. FMV EXPL.						
VARIOUS								
VARIOUS								
VARIOUS, CT 06492	\$ 21,801 \$	0						
	\$ 0							
FORM 990-EZ, PART I, LINE 16 - OTHE	R EXPENSES							
DESCRIPTION AMOUNT								
EXPENSES								

ζ]	PENSES			
	AWARDS		\$ 973	
	MEETINGS		\$ 4,336	
	WEBSITE		\$ 604	
	SUPPLIES		\$ 1,561	
	DUES		\$ 434	
		TOTAL	\$ 7,908	

Page 2

Name of the organization

ROTARY CLUB OF WALLINGFORD

Employer identification number

06-6068955

FORM 990-EZ, PART III - PRIMARY EXEMPT PURPOSE

THE ORGANIZATION'S PURPOSE IS PROVIDE MEMBERS WITH AN

OPPORTUNITY TO PARTICIPATE IN CIVIC AND CHARITABLE WORKS

FOR THE BENEFIT OF THE WALLINGFORD COMMUNITY.