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Form

990-EZ

Department of the Treasury

Internal Revenue Service

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)

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.

OMB No 1545-1150

2015

Open to Public Inspection

A For the 2015 calendar year, or tax year beginning 04-01-2015, and ending 03-31-2016

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C Name of organization

BENEVOLENT & PROTECTIVE ORDER OF ELKS #1060 BARTLESVILLE

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

Room/suite

1060 SWAN DRIVE

City or town, state or province, country, and ZIP or foreign postal code

BARTLESVILLE, OK 740065032

D Employer identification number

73-0386473

E Telephone number

(918) 333-0445

F Group Exemption Number

1156

G Accounting Method ☒ Cash ☐ Accrual Other (specify) _____

H Check ☒ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: ☒ N/A

J Tax-exempt status (check only one) ☐ 501(c)(3) ☒ 501(c)(8) (insert no) ☐ 4947(a)(1) or ☐ 527

K Form of organization ☐ Corporation ☐ Trust ☒ Association ☐ 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.

\$ 146,621

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	876					
	2	Program service revenue including government fees and contracts	2	47,073					
	3	Membership dues and assessments	3	14,574					
	4	Investment income	4	9,685					
	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						
Expenses	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	74,413					
	b	Less cost of goods sold	7b	57,165					
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	17,248					
	8	Other revenue (describe in Schedule O)	8						
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	89,456					
	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	15,026					
Net Assets	13	Professional fees and other payments to independent contractors	13	1,558					
	14	Occupancy, rent, utilities, and maintenance	14	42,463					
	15	Printing, publications, postage, and shipping	15	590					
	16	Other expenses (describe in Schedule O)	16	39,736					
	17	Total expenses. Add lines 10 through 16	17	99,373					
	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-9,917					
	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	261,562					
	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	251,645					

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 10642I

Form990-EZ(2015)

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	12,843	22	14,281
23 Land and buildings	200,947	23	200,947
24 Other assets (describe in Schedule O)	49,507	24	39,005
25 Total assets	263,297	25	254,233
26 Total liabilities (describe in Schedule O)	1,735	26	2,588
27 Net assets or fund balances (line 27 of column (B) must agree with line 21) . . .	261,562	27	251,645

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

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, optional for others)

28 Providing youth scholarships, assisting Veterans Groups as well as national and state Elks Foundations (Grants \$) If this amount includes foreign grants, check here . . . ☐	28a	
29		
(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	

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

[illegible]

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		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)		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)?		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		
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		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		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?		
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?		No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved ☐ 38b		
39	Section 501(c)(7) organizations Enter ☐ 39a		
a	Initiation fees and capital contributions included on line 9		
b	Gross receipts, included on line 9, for public use of club facilities		
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), 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		
c	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, 4955, and 4958 ☐ _____		
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) 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		No
41	List the states with which a copy of this return is filed ☐ OK		
42a	The organization's books are in care of ☐ Bartlesville Elks Lodge Telephone no ☐ (918) 333-0445 Located at ☐ 1060 Swan Drive Bartlesville, OK ZIP + 4 ☐ 740065032		
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 FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)	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 ☐ _____		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		
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		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		No
c	Did the organization receive any payments for indoor tanning services during the year?		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		
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		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)		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		
		46	No

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	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	No
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 "

(a) Name and title of each employee	(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
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
NONE		

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 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	***** Signature of officer			2016-06-23 Date	
	STEVE WALKER EXALTED RULER Type or print name and title				
Paid Preparer Use Only	Print/Type preparer's name MICHAEL A STEVENSON CPA CFP		Preparer's signature		Date 2016-06-16
	Firm's name			Check ☒ if self-employed	
	Firm's address			PTIN	
Firm's EIN					
Phone no (405) 359-1991					
May the IRS discuss this return with the preparer shown above? See instructions ☐ Yes ☒ No					

Additional Data

Software ID: 15000290

Software Version: 15.3.0.0

EIN: 73-0386473

Name: BENEVOLENT & PROTECTIVE ORDER OF ELKS #1060
BARTLESVILLE

Form 990EZ, Part IV - List of Officers, Directors, Trustees, and Key Employees

(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
Steve Walker Exalted Ruler	004 00	0		
Andrew Oleson Leading Knight	002 00	0		
Max Bailey Loyal Knight	002 00	0		
Karen Lynch Lecturing Knight	002 00	0		
Grover Shelts Esquire	002 00	0		
Ginger Davis Chaplain	002 00	0		
Larry Davis Treasurer	002 00	0		
Tonya Koster Secretary	002 00	1,500		
Barry Marshall Inner Guard	002 00	0		
Mike Robinson Trustee	002 00	0		
Patrick Brendle Trustee	002 00	0		
John Koster Trustee	002 00	0		
Wayne CLark Trustee	002 00	0		
Mike McAnaw Trustee	002 00	0		

TY 2015 Compensation Explanation

Name: BENEVOLENT & PROTECTIVE ORDER OF ELKS #1060
BARTLESVILLE

EIN: 73-0386473

Software ID: 15000290

Software Version: 15.3.0.0

Person Name	Explanation
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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.**

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

OMB No 1545-0047

2015

Open to Public Inspection

Name of the organization BENEVOLENT & PROTECTIVE ORDER OF ELKS #1060 BARTLESVILLE	Employer identification number 73-0386473
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990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990-EZ, Part I, Line 16, Other Expenses	Conferences, conventions, and meetings 2,600
Form 990-EZ, Part I, Line 16, Other Expenses	Equipment rental and maintenance 1,618
Form 990-EZ, Part I, Line 16, Other Expenses	Interest 55
Form 990-EZ, Part I, Line 16, Other Expenses	Supplies 12,942
Form 990-EZ, Part I, Line 16, Other Expenses	Telephone 1,588
Form 990-EZ, Part I, Line 16, Other Expenses	Depreciation 2,571
Form 990-EZ, Part I, Line 16, Other Expenses	Per Capita - Grand lodge 1,721
Form 990-EZ, Part I, Line 16, Other Expenses	Per Capita - State 800
Form 990-EZ, Part I, Line 16, Other Expenses	Payroll Taxes 916
Form 990-EZ, Part I, Line 16, Other Expenses	Advertising 248
Form 990-EZ, Part I, Line 16, Other Expenses	Other Pool Expenses 1,477
Form 990-EZ, Part I, Line 16, Other Expenses	Contributions 2,444
Form 990-EZ, Part I, Line 16, Other Expenses	Bank Credit Card Fees 3,271
Form 990-EZ, Part I, Line 16, Other Expenses	License Permits 2,067
Form 990-EZ, Part I, Line 16, Other Expenses	Miscellaneous Expense 1,280
Form 990-EZ, Part I, Line 16, Other Expenses	Bad debt 1,340
Form 990-EZ, Part I, Line 16, Other Expenses	Lodge activitise, Ritual and Special Events 2,798
Form 990-EZ, Part II, Line 24, Other Assets	Receivables Beginning of year 9,735, End of year 7,325
Form 990-EZ, Part II, Line 24, Other Assets	Inventory Beginning of year 7,150, End of year 7,023
Form 990-EZ, Part II, Line 24, Other Assets	Investments Beginning of year 32,622, End of year 24,657

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990-EZ, Part II, Line 26, Liabilities	Accounts Payable Beginning of year 1,735, End of year 2,588