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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](http://www.irs.gov/form990).

OMB No 1545-1150

**2015**Open to Public  
Inspection

**A** For the 2015 calendar year, or tax year beginning 7/01, 2015, and ending 6/30, 2016

**B** Check if applicable:  
☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C** **ROTARY INTERNATIONAL-JEFFERSON CITY**  
**WEST ROTARY**  
**520 DIX ROAD**  
**JEFFERSON CITY, MO 65109**

**D** Employer identification number  
23-7356414

**E** Telephone number  
573-635-0227

**F** Group Exemption Number 0573

**G** Accounting Method: ☒ Cash ☐ Accrual Other (specify) \_\_\_\_\_

**I** Website: WWW.JEFFCITYROTARY.ORG

**J** Tax-exempt status (check only one) — ☐ 501(c)(3) ☒ 501(c) ( 4 ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

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

**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. ▶ \$ 42,442.

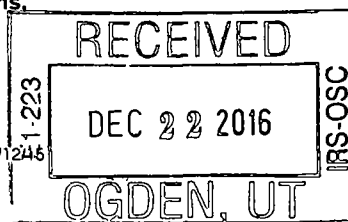
**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)Check if the organization used Schedule O to respond to any question in this Part I ☒

REVENUE	1	Contributions, gifts, grants, and similar amounts received	80.
	2	Program service revenue including government fees and contracts	1,453.
	3	Membership dues and assessments	38,382.
	4	Investment income	16.
	5a	Gross amount from sale of assets other than inventory	
	5b	Less: cost or other basis and sales expenses	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	
	6	Gaming and fundraising events	
	6a	Gross income from gaming (attach Schedule G if greater than \$15,000)	1,241.
	6b	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)	
6c	Less: direct expenses from gaming and fundraising events	1,879.	
6d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	-638.	
EXPENSES	7a	Gross sales of inventory, less returns and allowances	
	7b	Less: cost of goods sold	
	7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	
	8	Other revenue (describe in Schedule O) SEE SCHEDULE O	1,270.
	9	<b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	40,563.
	10	Grants and similar amounts paid (list in Schedule O) SEE SCHEDULE O	14,055.
	11	Benefits paid to or for members	
	12	Salaries, other compensation, and employee benefits	
	13	Professional fees and other payments to independent contractors	500.
	14	Occupancy, rent, utilities, and maintenance	
15	Printing, publications, postage, and shipping		
16	Other expenses (describe in Schedule O) SEE SCHEDULE O	35,649.	
17	<b>Total expenses.</b> Add lines 10 through 16	50,204.	
NET ASSETS	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	-9,641.
	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)	34,774.
	20	Other changes in net assets or fund balances (explain in Schedule O)	
	21	<b>Net assets or fund balances at end of year.</b> Combine lines 18 through 20	25,133.

BAA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990-EZ (2015)

TEEA0803L 10/12/15



SCANNED IN 11/11/16

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

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

(Required for section 501(c)(3) and 501(c)(4) organizations, optional for others )

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

Form 990-EZ (2015)

**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
<b>33</b> 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	<b>33</b>	X
<b>34</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)	<b>34</b>	X
<b>35 a</b> 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)?	<b>35 a</b>	X
<b>b</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	<b>35 b</b>	
<b>c</b> 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	<b>35 c</b>	X
<b>36</b> 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	<b>36</b>	X
<b>37 a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions <b>37 a</b> 0.		
<b>b</b> Did the organization file Form 1120-POL for this year?	<b>37 b</b>	X
<b>38 a</b> 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?	<b>38 a</b>	X
<b>b</b> If 'Yes,' complete Schedule L, Part II and enter the total amount involved <b>38 b</b> N/A		
<b>39</b> Section 501(c)(7) organizations. Enter:		
<b>a</b> Initiation fees and capital contributions included on line 9 <b>39 a</b> N/A		
<b>b</b> Gross receipts, included on line 9, for public use of club facilities <b>39 b</b> N/A		
<b>40 a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: N/A section 4911 <b>39 a</b> N/A; section 4912 <b>39 b</b> N/A; section 4955 <b>39 c</b> N/A		
<b>b</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 <b>40 b</b> X		
<b>c</b> 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 <b>40 c</b> 0.		
<b>d</b> Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization <b>40 d</b> 0.		
<b>e</b> 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 <b>40 e</b> X		
<b>41</b> List the states with which a copy of this return is filed <b>41</b> NONE		

	Yes	No
<b>42 a</b> The organization's books are in care of <b>EVERS AND COMPANY, CPA'S</b> Telephone no <b>573-635-0227</b> Located at <b>520 DIX ROAD JEFFERSON CITY MO</b> ZIP + 4 <b>65109</b>		
<b>b</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: <b>42 b</b> X		
See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
<b>c</b> 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: <b>42 c</b> X		

	Yes	No
<b>43</b> 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 <b>43</b> N/A		
<b>44 a</b> Did the organization maintain any donor advised funds during the year? If 'Yes,' Form 990 must be completed instead of Form 990-EZ <b>44 a</b> X		
<b>b</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 <b>44 b</b> X		
<b>c</b> Did the organization receive any payments for indoor tanning services during the year? <b>44 c</b> X		
<b>d</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 <b>44 d</b>		
<b>45 a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? <b>45 a</b> X		
<b>b</b> 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) <b>45 b</b> X		

- 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

	Yes	No
<b>46</b>		X

**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 ☐

- 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?
- b** 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'

	Yes	No
<b>47</b>		
<b>48</b>		
<b>49a</b>		
<b>49b</b>		

(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

**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'

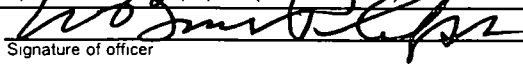
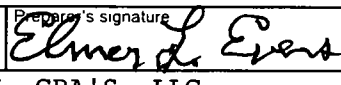
(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

**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 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.

<b>Sign Here</b>	Signature of officer 	Date <u>12/16/16</u>
	BRUCE PHELPS Type or print name and title	
TREASURER		
<b>Paid Preparer Use Only</b>	Print/Type preparer's name ELMER L. EVERS, CPA	Preparer's signature 
	Firm's name <b>▶</b> EVERS & COMPANY, CPA'S, LLC	Date <u>12-13-16</u>
	Firm's address <b>▶</b> 520 DIX ROAD JEFFERSON CITY, MO 65109	Check <input type="checkbox"/> if self-employed PTIN P00172875
	Firm's EIN <b>▶</b> 43-1121359	Phone no (573) 635-0227

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 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](http://www.irs.gov/form990).

OMB No 1545-0047

**2015**

Open to Public  
Inspection

Name of the organization **ROTARY INTERNATIONAL-JEFFERSON CITY**  
**WEST ROTARY**

Employer identification number  
**23-7356414**

**FORM 990-EZ, PART I, LINE 8**  
**OTHER REVENUE**

RESTRICTED-ROTARY FOUNDAT  
MISCELLANEOUS

\$	1,125.
	145.
<b>TOTAL</b>	<b>\$ 1,270.</b>

**FORM 990-EZ, PART I, LINE 10**  
**GRANTS AND SIMILAR AMOUNTS PAID IN EXCESS OF \$5,000**

CLASS OF ACTIVITY: SCHOLARSHIP  
DONEE'S NAME: SCHOLARSHIPS UNDER \$5000  
CASH AMOUNT GIVEN:

\$ 7,900.

**FORM 990-EZ, PART I, LINE 16**  
**OTHER EXPENSES**

CONFERENCES, CONVENTIONS, AND MEETINGS  
DISTRICT DUES  
EXCHANGE STUDENT  
INFORMATION TECHNOLOGY  
INSURANCE  
OFFICE EXPENSES  
SUPPLIES

\$	24,613.
	5,451.
	1,500.
	596.
	2,292.
	618.
	579.
<b>TOTAL</b>	<b>\$ 35,649.</b>

**FORM 990-EZ, PART III - ORGANIZATION'S PRIMARY EXEMPT PURPOSE**

PROMOTE HUMANITARIAN & ETHICAL VALUES

**FORM 990-EZ, PART IV**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

NAME AND TITLE	AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	HEALTH BENEFITS & CONTRIB- UTION TO EBP & DC	ESTIMATED AMOUNT OF OTHER COMPEN.
SHERRI WILBERS BOARD MEMBER	0.25	\$ 0.	\$ 0.	\$ 0.
KENT TRIMBLE PAST PRESIDENT	0.25	0.	0.	0.
WILLIAM BUCK PRESIDENT	5	0.	0.	0.
BRUCE PHELPS TREASURER	4	0.	0.	0.

Name of the organization **ROTARY INTERNATIONAL-JEFFERSON CITY  
WEST ROTARY**

Employer identification number  
**23-7356414**

**FORM 990-EZ, PART IV (CONTINUED)**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

NAME AND TITLE	AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	HEALTH BENEFITS & CONTRIB- UTION TO EBP & DC	ESTIMATED AMOUNT OF OTHER COMPEN.
STEVE BRENNAMAN BOARD MEMBER	0.25	\$ 0.	\$ 0.	0.
SALLY GRAHAM BOARD MEMBER	0.25	0.	0.	0.
RUSSELL ROTTMAN SECRETARY	3	0.	0.	0.
WARREN PROST BOARD MEMBER	0.25	0.	0.	0.
ALICIA EMBLY TURNER PAST PRESIDENT	0.25	0.	0.	0.
IVAN TURNER BOARD MEMBER	0.25	0.	0.	0.
JILL DOBBS PRESIDENT ELECT	3	0.	0.	0.
WALTER ROTTMAN SERGEANTAT ARMS	2	0.	0.	0.
BRIAN JOHNSON BOARD MEMBER	0.25	0.	0.	0.
RITA ESTERLY BOARD MEMBER	0.25	0.	0.	0.
CHRISTOPHER WHITE BOARD MEMBER	0.25	0.	0.	0.
<b>TOTAL</b>		<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>