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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 07-01-2015, and ending 06-30-2016

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

**C** Name of organization  
ROTARY INTERNATIONAL DISTRICT 5650 INC

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

6515 SALTGRASS ROAD

City or town, state or province, country, and ZIP or foreign postal code  
LINCOLN, NE 68521

**D** Employer identification number  
47-0658808

**E**Telephone number  
(402) 477-6574

**F**Group Exemption Number ▶ 0573

**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: ▶WWW.ROTARYDISTRICT5650.ORG

**J** Tax-exempt status (check only one) - ☐ 501(c)(3) ☒ 501(c)( 4) ◀(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. ▶ \$ 197,797

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	49,077
	2	Program service revenue including government fees and contracts . . . . .	2	54,667
	3	Membership dues and assessments . . . . .	3	82,070
	4	Investment income . . . . .	4	435
	5a	Gross amount from sale of assets other than inventory . . . . .	5c	
	b	Less cost or other basis and sales expenses . . . . .		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) . . . . .		
	6	Gaming and fundraising events	6d	
	a	Gross income from gaming (attach Schedule G if greater than \$15,000) . . . . .		
	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) . . . . .		
Expenses	7a	Gross sales of inventory, less returns and allowances . . . . .	7c	
	b	Less cost of goods sold . . . . .		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) . . . . .		
	8	Other revenue (describe in Schedule O) . . . . .	8	11,548
	9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 . . . . . ▶	9	197,797
	10	Grants and similar amounts paid (list in Schedule O) . . . . .	10	38,045
	11	Benefits paid to or for members . . . . .	11	
	12	Salaries, other compensation, and employee benefits . . . . .	12	
	13	Professional fees and other payments to independent contractors . . . . .	13	
	14	Occupancy, rent, utilities, and maintenance . . . . .	14	
Net Assets	15	Printing, publications, postage, and shipping . . . . .	15	
	16	Other expenses (describe in Schedule O) . . . . .	16	121,994
	17	Total expenses. Add lines 10 through 16 . . . . . ▶	17	160,039
	18	Excess or (deficit) for the year (Subtract line 17 from line 9) . . . . .	18	37,758
	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	108,298
	20	Other changes in net assets or fund balances (explain in Schedule O) . . . . .	20	0
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 . . . . . ▶	21	146,056

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	105,603	22	143,358
23 Land and buildings		23	
24 Other assets (describe in Schedule O)	2,695	24	2,698
25 Total assets	108,298	25	146,056
26 Total liabilities (describe in Schedule O)	0	26	0
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	108,298	27	146,056

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?  
THE OBJECTIVE OF ROTARY IS TO ENCOURAGE AND FOSTER THE IDEAL OF SERVICE AS A BASIS OF WORTHY ENTERPRISE AND, IN PARTICULAR, TO ENCOURAGE AND FOSTER FIRST - THE DEVELOPMENT OF ACQUAINTANCE AS AN OPPORTUNITY FOR SERVICE, SECOND - HIGH ETHICAL STANDARDS IN BUSINESS AND PROFESSIONS, THE RECOGNITION OF THE WORTHINESS OF ALL USEFUL OCCUPATIONS, AND THE DIGNIFYING OF EACH ROTARIAN'S OCCUPATION AS AN OPPORTUNITY TO SERVE SOCIETY, THIRD - THE APPLICATION OF THE IDEAL OF SERVICE IN EACH ROTARIAN'S PERSONAL, BUSINESS, AND COMMUNITY LIFE, FOURTH - THE ADVANCEMENT OF INTERNATIONAL UNDERSTANDING, GOODWILL, AND PEACE THROUGH A WORLD FELLOWSHIP OF BUSINESS AND PROFESSIONAL PERSONS UNITED IN THE IDEAL OF SERVICE

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

28

See Additional Data Table

(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

151,937

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
ROD BATES DISTRICT GOVERNOR	30 00	0	0	0
GARY BREN DISTRICT GOVERNOR-ELECT	5 00	0	0	0
TOM CARDWELL DISTRICT GOVERNOR-NOMINEE	1 00	0	0	0
ROBERT PERRIN DISTRICT SECRETARY	1 00	0	0	0
JAMES A MASTERA DISTRICT TREASURER	8 00	0	0	0
BRIAN MOON PAST DISTRICT GOVERNOR	1 00	0	0	0
JOSEPH ROBERTS DISTRICT FOUNDATION CHAIR	1 00	0	0	0

Part VOther 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) . . . . .	Yes	
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 <b>Form 990-T</b> 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 ▶ <div>37a</div> 0		
b	Did the organization file <b>Form 1120-POL</b> 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 . <div>38b</div>		
39	Section 501(c)(7) organizations Enter . <div>39a</div>		
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 . . . . .		No
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 ▶ 0		
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax on line 40c reimbursed by the organization . . . . . ▶ 0		
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 ▶		
42a	The organization's books are in care of ▶ JAMES A MASTERA Telephone no ▶ (402) 477-6574 Located at ▶ 6515 SALTGRASS ROAD LINCOLN, NE ZIP + 4 ▶ 68521		
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 <b>FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)</b>		
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 <b>Form 1041</b> - Check here . . . . . ▶ <div>43</div> and enter the amount of tax-exempt interest received or accrued during the tax year . . . . .		
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) . . . . .		

		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 . . . . .		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 . . . . .		
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? . . . . .		
49b	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 "

(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.

Sign Here	***** Signature of officer		2016-10-10 Date				
	GARY BREN GOVERNOR, ROTARY DISTRICT 5650 Type or print name and title						
Paid Preparer Use Only	Print/Type preparer's name JERRY M O'DOHERTY		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN P00400861
	Firm's name ▶ SEIM JOHNSON LLP					Firm's EIN ▶ 47-6097913	
	Firm's address ▶ 18081 BURT STREET SUITE 200 OMAHA, NE 680224722					Phone no (402) 330-2660	

May the IRS discuss this return with the preparer shown above? See instructions . . . . . ▶ ☒ Yes ☐ No

Additional Data

Software ID:  
Software Version:  
EIN: 47-0658808  
Name: ROTARY INTERNATIONAL DISTRICT 5650 INC

Form 990EZ, Part III - Statement of Program Service Accomplishments

Describe what was achieved in carrying out the organization's exempt purposes. 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 501(c)(3) and 501(c)(4) organizations and 4947(a)(1) trusts; optional for others.)	
<p>THE ACTIVITIES AND ORGANIZATION OF A ROTARY DISTRICT EXIST SOLELY TO HELP THE INDIVIDUAL ROTARY CLUB ADVANCE THE OBJECT OF ROTARY AND SHOULD NOT DIMINISH</p> <p><b>28</b> SERVICES PROVIDED BY ROTARY CLUBS AND INDIVIDUAL ROTARIANS</p> <p>(Grants \$ 38,045)</p> <p>If this amount includes foreign grants, check here . . . <input type="checkbox"/></p>	<b>28a</b>	151,937

## TY 2015 Transfers Personal Benefits Contracts Declaration

**Name:** ROTARY INTERNATIONAL DISTRICT 5650 INC

**EIN:** 47-0658808

**Declaration:** THE ORGANIZATION DID NOT, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY,OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT.THE ORGANIZATION, DID NOT, DURING THE YEAR, PAY ANY PREMIUMS, DIRECTLY,OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT.

**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).**2015****Open to Public  
Inspection**Name of the organization  
ROTARY INTERNATIONAL DISTRICT 5650 INC**Employer identification number**

47-0658808

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
FORM 990-EZ, PART I, LINE 4 - OTHER INVESTMENT INCOME	DESCRIPTION CERTIFICATES OF DEPOSIT AMOUNT 435
FORM 990-EZ, PART I, LINE 8 - OTHER REVENUE	DESCRIPTION ROTARY INTERNATIONAL ALLOCATIONS AMOUNT 11,243 DESCRIPTION MISCELLANEOUS INCOME AMOUNT 305 TOTAL TO FORM 990-EZ, LINE 8 11,548

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
FORM 990-EZ, PART I, LINE 16 - OTHER EXPENSES	DESCRIPTION DISTRICT GOVERNOR SUPPORT AMOUNT 17,723 DESCRIPTION DISTRICT GOVERNOR ELECT SUPPORT AMOUNT 14,222 DESCRIPTION OTHER DISTRICT OFFICERS AMOUNT 5,016 DESCRIPTION DISTRICT COMMITTEES/PROGRAMS AMOUNT 17,830 DESCRIPTION DISTRICT MEETING SUPPORT AMOUNT 6,479 DESCRIPTION MISCELLANEOUS AMOUNT 8,102 DESCRIPTION DISTRICT CONFERENCES AMOUNT 25,981 DESCRIPTION YOUTH EXCHANGE EXPENSES AMOUNT 15,546 DESCRIPTION ASSEMBLY EXPENSES AMOUNT 2,008 DESCRIPTION FOUNDATION OTHER EXPENSES AMOUNT 3,205 DESCRIPTION TRAVEL REIMBURSEMENTS AMOUNT 5,882 TOTAL TO FORM 990-EZ, LINE 16 121,994
FORM 990-EZ, PART II, LINE 24 - OTHER ASSETS	DESCRIPTION ACCOUNTS RECEIVABLE BEG OF YEAR AMOUNT 2,695 END OF YEAR AMOUNT 2,698

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART V, LINE 34	<p>THE CHANGES TO THE BYLAWS DURING THE FISCAL YEAR ENDING JUNE 30, 2016 ARE SUMMARIZED AS FOLLOWS ARTICLE 2 MEMBERS, DUES, AND ANNUAL MEETING OF THE MEMBERSHIP THE CHANGES ADD A DEFINITION OF WHAT A MEMBER IS AND A DEFINITION OF THE DISTRICT LEVY IN ADDITION TO PROVIDING THE BASIS NUMBER AND DATE FOR THE LEVY, IT ALSO DEFINES WHEN THE LEVY IS DUE TO THE DISTRICT AS A SPECIFIC DATE THE CHANGES DEFINE A VOTING MEMBER AS AN ELECTOR AND DEFINES THAT ALL ELECTORS HOLD ONE VOTE ON ALL BUSINESS ITEMS UNLESS DESIGNATED AS A PROXY ARTICLE 4 BOARD OF DIRECTORS THE NEW BYLAWS CHANGE THE COMPOSITION OF THE BOARD, INCLUDING ADDING AT LARGE MEMBERS FROM THE DISTRICT MEMBERSHIP AND PROVIDING A MECHANISM FOR APPOINTMENT OF SUCCESSOR DIRECTORS THE BOARD SIZE IS INCREASED FROM 11 TO 13 MEMBERS THE CHANGES ALSO DEFINE HOW A BOARD MEMBER MAY BE REMOVED FROM THE BOARD THE NEW BYLAWS ADD THE MAKEUP AND COMPOSITION OF A DISTRICT EXECUTIVE COMMITTEE WHICH "MAY EXERCISE ALL POWERS OF THE BOARD WHEN THE BOARD IS NOT IN SESSION IT WILL MAKE DECISIONS BETWEEN MEETINGS OF THE CLUBS AND BETWEEN MEETINGS OF THE BOARD ON BEHALF OF THE DISTRICT ON MATTERS REQUIRING IMMEDIATE ATTENTION" ARTICLE 5 OFFICERS LANGUAGE WAS ADDED THAT SPECIFIES THAT THE SELECTION OF THESE OFFICERS SHALL BE "GOVERNED BY THE RULES IN THE ROTARY INTERNATIONAL MANUAL OF PROCEDURES " THE CHANGES DEFINE HOW A PERSON IN A LEADERSHIP ROLE CAN BE REMOVED FROM OFFICE ARTICLE 9 DISTRICT COMMITTEES THE NEW BYLAWS DEFINE THE BASIC RULES GOVERNING ALL COMMITTEES AND IN ITS OPENING CLAUSE DECLARES "THE BOARD MAY CREATE COMMITTEES TO CONDUCT SPECIFIC TASKS REQUIRED TO MEET THE MISSION OF THE DISTRICT AND RI AND TO COMPLY WITH POLICIES OF RI ANY STANDING OR AD HOC COMMITTEE OF THE DISTRICT MUST BE DEFINED IN THE DISTRICT LEADERSHIP PLAN, WHICH IS CONTAINED IN THE DISTRICT MANUAL OF POLICIES AND PROCEDURES PROPER DEFINITION OF A COMMITTEE INCLUDES COMMITTEE PURPOSE, TENURE (STANDING OR AD HOC), LEADERSHIP STRUCTURE, RESPONSIBILITIES, AND COMMITTEE MEMBER JOB DESCRIPTIONS " ARTICLE 10 INDEMNIFICATION THIS SECTION IN THE NEW BYLAWS PROVIDES - CONFLICT OF INTEREST TERMS THAT ARE NOT PRESENT IN THE ORIGINAL BYLAWS - INDEMNIFICATION LANGUAGE THAT SATISFIES CURRENT LEGAL REQUIREMENTS - A PROVISION FOR DISTRICT INSURANCE</p>