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# Short Form Return of Organization Exempt From Income Tax

## 2016

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).

Department of the Treasury  
Internal Revenue Service

Open to Public  
Inspection

**A** For the 2016 calendar year, or tax year beginning JUL 1, 2016 and ending JUN 30, 2017

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

**C** Name of organization  
**ROTARY INTERNATIONAL MANCHESTER ESSEX ROTARY CLUB**

**D** Employer identification number  
**80-0026823**

Number and street (or P.O. box, if mail is not delivered to street address) Room/suite  
**P.O. BOX 403**

**E** Telephone number  
**978-468-7338**

City or town, state or province, country, and ZIP or foreign postal code  
**MANCHESTER, MA 01944**

**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.MANCHESTERESSEXROTARY.ORG**

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

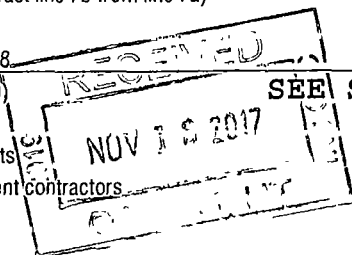
**K** Form of organization:  Corporation  Trust  Association  Other **DISREGARDED ENTITY**

**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. ▶ \$ **60,472.**

**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

	Description		Amount
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, and similar amounts received	<b>1</b>	2,661.
	<b>2</b> Program service revenue including government fees and contracts	<b>2</b>	
	<b>3</b> Membership dues and assessments	<b>3</b>	17,406.
	<b>4</b> Investment income	<b>4</b>	97.
	<b>5a</b> Gross amount from sale of assets other than inventory	<b>5a</b>	
	<b>b</b> Less: cost or other basis and sales expenses	<b>5b</b>	
	<b>c</b> Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	<b>5c</b>	
	<b>6</b> Gaming and fundraising events		
	<b>a</b> Gross income from gaming (attach Schedule G if greater than \$15,000)	<b>6a</b>	
	<b>b</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)	<b>6b</b>	40,308.
<b>c</b> Less: direct expenses from gaming and fundraising events	<b>6c</b>	12,787.	
<b>d</b> Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	<b>6d</b>	27,521.	
<b>Expenses</b>	<b>7a</b> Gross sales of inventory, less returns and allowances	<b>7a</b>	
	<b>b</b> Less: cost of goods sold	<b>7b</b>	
	<b>c</b> Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	<b>7c</b>	
	<b>8</b> Other revenue (describe in Schedule O)	<b>8</b>	
	<b>9 Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8. ▶	<b>9</b>	47,685.
	<b>10</b> Grants and similar amounts paid (list in Schedule O)	<b>10</b>	20,432.
	<b>11</b> Benefits paid to or for members	<b>11</b>	
	<b>12</b> Salaries, other compensation, and employee benefits	<b>12</b>	
<b>Net Assets</b>	<b>13</b> Professional fees and other payments to independent contractors	<b>13</b>	625.
	<b>14</b> Occupancy, rent, utilities, and maintenance	<b>14</b>	2,628.
	<b>15</b> Printing, publications, postage, and shipping	<b>15</b>	207.
	<b>16</b> Other expenses (describe in Schedule O)	<b>16</b>	22,175.
	<b>17 Total expenses.</b> Add lines 10 through 16. ▶	<b>17</b>	46,067.
	<b>18</b> Excess or (deficit) for the year (Subtract line 17 from line 9)	<b>18</b>	1,618.
	<b>19</b> 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)	<b>19</b>	67,855.
<b>20</b> Other changes in net assets or fund balances (explain in Schedule O)	<b>20</b>	0.	
<b>21</b> Net assets or fund balances at end of year. Combine lines 18 through 20. ▶	<b>21</b>	69,473.	



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**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  **X**

	(A) Beginning of year		(B) End of year
22 Cash, savings, and investments	68,530.	22	69,473.
23 Land and buildings		23	
24 Other assets (describe in Schedule O)		24	
25 Total assets	68,530.	25	69,473.
26 Total liabilities (describe in Schedule O) <b>SEE SCHEDULE O</b>	675.	26	0.
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	67,855.	27	69,473.

**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  **X**

Expenses  
 (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)

What is the organization's primary exempt purpose? **COMMUNITY PHILANTHROPIC ACTIVITIES**

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

<b>28 PROVIDE SCHOLARSHIPS TO HIGH SCHOOL SENIORS ATTENDING COLLEGE.</b>		
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>28a</b>	10,000.
<b>29 COMMUNITY PROJECT SUPPORT</b>		
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>29a</b>	8,716.
<b>30 REGIONAL SCHOOL SUPPORT</b>		
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>30a</b>	1,716.
<b>31 Other program services (describe in Schedule O) SEE SCHEDULE O</b>		
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>31a</b>	
<b>32 Total program service expenses (add lines 28a through 31a)</b>	<b>32</b>	<b>20,432.</b>

**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
CHRISTOPHER SHEA PRESIDENT	10.00	0.	0.	0.
DEBORAH MARCUS FOUNDATION CHAIR	5.00	0.	0.	0.
DOROTHY SIERADZKI SECRETARY	10.00	0.	0.	0.
SARAH WILLWERTH-DYER TREASURER	5.00	0.	0.	0.
MICHAEL STORELLA FIRST VICE PRESIDENT	5.00	0.	0.	0.
ROBERT LIPKOWITZ SECOND VICE PRESIDENT	5.00	0.	0.	0.

**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 Sch. 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		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)		X
<b>35a</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)?		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	N/A	
<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		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		X
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions	37a	0.
<b>b</b> Did the organization file Form 1120-POL for this year?		X
<b>38a</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?		X
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	N/A
<b>39</b> Section 501(c)(7) organizations. Enter:		
<b>a</b> Initiation fees and capital contributions included on line 9	39a	N/A
<b>b</b> Gross receipts, included on line 9, for public use of club facilities	39b	N/A
<b>40a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 <input type="checkbox"/> N/A; section 4912 <input type="checkbox"/> N/A; section 4955 <input type="checkbox"/> 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	40b	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		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		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	40e	X
<b>41</b> List the states with which a copy of this return is filed <input type="checkbox"/> NONE		
<b>42a</b> The organization's books are in care of <input type="checkbox"/> SARAH WILLWERTH-DYER Telephone no. <input type="checkbox"/> 978-468-7338 Located at <input type="checkbox"/> 227 WILLOW STREET, S. HAMILTON, MA ZIP + 4 <input type="checkbox"/> 01982		
<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: <input type="checkbox"/>	42b	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 United States? If "Yes," enter the name of the foreign country: <input type="checkbox"/>	42c	X
<b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year	43	N/A
<b>44a</b> Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a	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	44b	X
<b>c</b> Did the organization receive any payments for indoor tanning services during the year?	44c	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	44d	
<b>45a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a	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)	45b	

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
46		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

	Yes	No
47		
48		
49a		
49b		

47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Sch. 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."

(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
N/A				

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." **N/A**

(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: *Sarah Willwerth-Dyer* Date: 11/9/17  
**SARAH WILLWERTH-DYER, TREASURER**  
 Type or print name and title

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input checked="" type="checkbox"/> if self-employed	PTIN
	<b>FREDRIC C. LABEL</b>	<i>[Signature]</i>	11/03/17		P00672039
	Firm's name ▶ <b>LEBEL &amp; ASSOCIATES, P.C.</b>	Firm's EIN ▶ <b>04-3227388</b>		Phone no. <b>978-774-8290</b>	
	Firm's address ▶ <b>74 ELM STREET DANVERS, MA 01923</b>				

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

SCHEDULE O  
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No 1545-0047

2016

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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).

Name of the organization

ROTARY INTERNATIONAL MANCHESTER ESSEX  
ROTARY CLUB

Employer identification number

80-0026823

FORM 990-EZ, PART I, LINE 4, OTHER INVESTMENT INCOME:

DESCRIPTION OF PROPERTY:

AMOUNT:

INTEREST

97.

FORM 990-EZ, PART I, LINE 10, GRANTS AND ALLOCATIONS:

ACTIVITY CLASSIFICATION: CONTRIBUTION

GRANTEE NAME: VARIOUS CHARITIES

GRANTEE ADDRESS: MANCHESTER, MA 01944

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: VARIOUS

AMOUNT GIVEN:

5,235.

ACTIVITY CLASSIFICATION: CONTRIBUTION

GRANTEE NAME: VARIOUS CIVIC PROJECTS

GRANTEE ADDRESS: ESSEX, MA 01929

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: VARIOUS

AMOUNT GIVEN:

3,481.

ACTIVITY CLASSIFICATION: CONTRIBUTION

GRANTEE NAME: MANCHESTER-ESSEX SCHOOL DISTRICT

GRANTEE ADDRESS: MANCHESTER, MA 01944

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: VARIOUS

AMOUNT GIVEN:

1,716.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2016)

832211 08-25-16

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

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

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OMB No. 1545-0047

**2016**

Open to Public  
Inspection

Name of the organization

ROTARY INTERNATIONAL MANCHESTER ESSEX  
ROTARY CLUB

Employer identification number

80-0026823

ACTIVITY CLASSIFICATION: SCHOLARSHIP

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: 12/21/16

AMOUNT GIVEN:

2,000.

ACTIVITY CLASSIFICATION: SCHOLARSHIP

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: 01/03/17

AMOUNT GIVEN:

2,000.

ACTIVITY CLASSIFICATION: SCHOLARSHIP

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: 01/03/17

AMOUNT GIVEN:

2,000.

ACTIVITY CLASSIFICATION: SCHOLARSHIP

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: 01/03/17

AMOUNT GIVEN:

2,000.

ACTIVITY CLASSIFICATION: SCHOLARSHIP

PROPERTY DESCRIPTION: CASH

DATE OF GIFT: 01/10/17

AMOUNT GIVEN:

2,000.

TOTAL INCLUDED ON FORM 990-EZ, LINE 10

20,432.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2016)

832211 08-25-16

SCHEDULE O  
(Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

OMB No 1545-0047

2016

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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).

Name of the organization

ROTARY INTERNATIONAL MANCHESTER ESSEX  
ROTARY CLUB

Employer identification number

80-0026823

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

DESCRIPTION OF OTHER EXPENSES:	AMOUNT:
DUES & MEMBERSHIPS	4,149.
SEMINARS & MEETINGS	16,260.
BANK CHARGES & CREDIT CARD FEES	109.
SUPPLIES	1,657.
TOTAL TO FORM 990-EZ, LINE 16	22,175.

FORM 990-EZ, PART II, LINE 26, OTHER LIABILITIES:

DESCRIPTION	BEG. OF YEAR	END OF YEAR
DUE TO ROTARY INTERNATIONAL	675.	0.

FORM 990-EZ, PART III LINE 31, OTHER PROGRAM SERVICE ACCOMPLISHMENTS:

MAINTAIN AFFILIATION WITH NATIONAL ORGANIZATION

FORM 990-EZ, PART V, INFORMATION REGARDING PERSONAL BENEFIT CONTRACTS:

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.