

Form **990-EZ** (2017)

**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 |
|---------------------------------------------------------------------------------------|-----------------------|-----------|-----------------|
| <b>22</b> Cash, savings, and investments . . . . .                                    | 46,348                | <b>22</b> | 61,664          |
| <b>23</b> Land and buildings . . . . .                                                |                       | <b>23</b> |                 |
| <b>24</b> Other assets (describe in Schedule O) . . . . .                             |                       | <b>24</b> |                 |
| <b>25</b> Total assets . . . . .                                                      | 46,348                | <b>25</b> | 61,664          |
| <b>26</b> Total liabilities (describe in Schedule O). . . . .                         | 0                     | <b>26</b> | 0               |
| <b>27</b> Net assets or fund balances (line 27 of column (B) must agree with line 21) | 46,348                | <b>27</b> | 61,664          |

**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 ORGANIZATION IS A LOCAL CHAPTER OF NATIONAL COLLEGIATE SOCIAL FRATERNITY WHOSE PURPOSE IS TO PROVIDE MEALS, HOUSING AND SOCIAL PROGRAMS FOR THE LOCAL SOCIAL FRATERNITY MEMBERS  
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 ☐  
**29**  
(Grants \$ ) If this amount includes foreign grants, check here ☐  
**30**  
(Grants \$ ) If this amount includes foreign grants, check here ☐  
**31** Other program services (describe in Schedule O) . . . . .  
(Grants \$ ) If this amount includes foreign grants, check here ☐  
**32** Total program service expenses (add lines 28a through 31a) **32**

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

**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 |
|-----------------------------------|------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------------------|
| BAILEE BURGESS                    | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| ASSISTANT DIRECTOR OF RECRUITMENT |                                                |                                                                            |                                                                                         |                                            |
| KARLEE MCCARROLL                  | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| CHAPTER PRESIDENT                 |                                                |                                                                            |                                                                                         |                                            |
| MARGARET HOFMANN                  | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF ACADEMIC ENRIC        |                                                |                                                                            |                                                                                         |                                            |
| BROOKE BALLENGER                  | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF ACTIVITIES            |                                                |                                                                            |                                                                                         |                                            |
| MEGAN WALKER                      | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF COMMUNICATION         |                                                |                                                                            |                                                                                         |                                            |
| SIERRA GARRETT                    | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF LEADERSHIP            |                                                |                                                                            |                                                                                         |                                            |
| VICTORIA DAVIDSON                 | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF MEMBERSHIP            |                                                |                                                                            |                                                                                         |                                            |
| QUINLAN KOYL                      | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF MERCHANDISING         |                                                |                                                                            |                                                                                         |                                            |
| SAMANTHA RUTH                     | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF NEW MEMBER ENG        |                                                |                                                                            |                                                                                         |                                            |
| SAMANTHA SOLIZ                    | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF NEW MEMBER PRO        |                                                |                                                                            |                                                                                         |                                            |
| MEAGAN PATTERSON                  | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF PROPERTY              |                                                |                                                                            |                                                                                         |                                            |
| SOPHIA UGARKOVICH                 | 1 00                                           | 0                                                                          | 0                                                                                       | 0                                          |
| DIRECTOR OF RITUAL                |                                                |                                                                            |                                                                                         |                                            |

**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>         | No |
| <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>         | No |
| <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)? . . . . .                                                                                                                                             | <b>35a</b>        | No |
| <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>35b</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>35c</b>        | No |
| <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>         | No |
| <b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ <b>37a</b> 0                                                                                                                                                                                                                                | <b>37a</b>        |    |
| <b>b</b> Did the organization file <b>Form 1120-POL</b> for this year? . . . . .                                                                                                                                                                                                                                                                      | <b>37b</b>        |    |
| <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? . . . . .                                                                                                     | <b>38a</b>        | No |
| <b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved . . . . .                                                                                                                                                                                                                                                         | <b>38b</b>        |    |
| <b>39</b> Section 501(c)(7) organizations Enter . . . . .                                                                                                                                                                                                                                                                                             |                   |    |
| <b>a</b> Initiation fees and capital contributions included on line 9 . . . . .                                                                                                                                                                                                                                                                       | <b>39a</b> 12,170 |    |
| <b>b</b> Gross receipts, included on line 9, for public use of club facilities . . . . .                                                                                                                                                                                                                                                              | <b>39b</b> 0      |    |
| <b>40a</b> Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ , section 4912 ▶ , section 4955 ▶ . . . . .                                                                                                                                                                           |                   |    |
| <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>40b</b>        |    |
| <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>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>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>40e</b>        | No |
| <b>41</b> List the states with which a copy of this return is filed ▶ . . . . .                                                                                                                                                                                                                                                                       |                   |    |
| <b>42a</b> The organization's books are in care of ▶ ANNA BEIL Telephone no ▶ (503) 860-2666<br>Located at ▶ 1260 W HALE ST BOISE, ID ZIP + 4 ▶ 83706                                                                                                                                                                                                 |                   |    |
| <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)? . . . . .                                                                                           | <b>42b</b>        | No |
| If "Yes," enter the name of the foreign country ▶ . . . . .                                                                                                                                                                                                                                                                                           |                   |    |
| See the instructions for exceptions and filing requirements for <b>FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)</b> . . . . .                                                                                                                                                                                                |                   |    |
| <b>c</b> At any time during the calendar year, did the organization maintain an office outside the U S ? . . . . .                                                                                                                                                                                                                                    | <b>42c</b>        | No |
| If "Yes," enter the name of the foreign country ▶ . . . . .                                                                                                                                                                                                                                                                                           |                   |    |
| <b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> - Check here . . . . . ▶ <input type="checkbox"/><br>and enter the amount of tax-exempt interest received or accrued during the tax year . . . . . ▶ <b>43</b>                                                                                |                   |    |
| <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 . . . . .                                                                                                                                                                                               | <b>44a</b>        | No |
| <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>44b</b>        | No |
| <b>c</b> Did the organization receive any payments for indoor tanning services during the year? . . . . .                                                                                                                                                                                                                                             | <b>44c</b>        | No |
| <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>44d</b>        |    |
| <b>45a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .                                                                                                                                                                                                                                          | <b>45a</b>        | No |
| <b>45b</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>45b</b>        |    |

|    |                                                                                                                                                                                                      |     |    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
|    |                                                                                                                                                                                                      | 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? <b>NOTE.</b> All Section 501(c)(3) organizations must attach a completed Schedule A . . . . . | <input type="checkbox"/> Yes <input type="checkbox"/> 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              | *****<br>Signature of officer                          |                      | 2018-10-25<br>Date |                                                                   |
|                        | ANNA BEIL VP FINANCE<br>Type or print name and title   |                      |                    |                                                                   |
| Paid Preparer Use Only | Print/Type preparer's name<br>MELANIE POWELL CPA       | Preparer's signature | Date               | Check <input type="checkbox"/> if self-employed<br>PTIN P01253029 |
|                        | Firm's name ▶ OMEGA FINANCIAL INC                      |                      |                    | Firm's EIN ▶ 58-2096979                                           |
|                        | Firm's address ▶ 1242 6TH AVENUE<br>COLUMBUS, GA 31901 |                      |                    | Phone no (706) 571-0083                                           |

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

Additional Data

Software ID:  
Software Version:  
EIN: 27-3522228  
Name: ALPHA GAMMA DELTA-DELTA UPSILON  
CHAPTER

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

| 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<br>(Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.) |   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------------------------------------------------------------------|---|
| <b>28</b><br>PROVIDED MEALS, HOUSING AND SOCIAL PROGRAMS TO THE LOCAL SOCIAL FRATERNITY MEMBERS - A TOTAL OF 144 MEMBERS FOR THE YEAR<br><br>(Grants \$ 0) If this amount includes foreign grants, check here . . . <input type="checkbox"/>                                                |  | <b>28a</b>                                                                                     | 0 |

## **TY 2017 Transfers Personal Benefits Contracts Declaration**

**Name:** ALPHA GAMMA DELTA-DELTA UPSILON  
CHAPTER

**EIN:** 27-3522228

**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.

|                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                    |
|-------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| <b>SCHEDULE O</b><br>(Form 990 or 990-EZ)<br><br><small>Department of the Treasury<br/>Internal Revenue Service</small> | <b>Supplemental Information to Form 990 or 990-EZ</b><br>Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.<br>▶ Attach to Form 990 or 990-EZ.<br>▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at <a href="http://www.irs.gov/form990">www.irs.gov/form990</a> . | <small>OMB No 1545-0047</small><br><b>2017</b><br><b>Open to Public Inspection</b> |
|-------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|

|                                                                     |                                              |
|---------------------------------------------------------------------|----------------------------------------------|
| Name of the organization<br>ALPHA GAMMA DELTA-DELTA UPSILON CHAPTER | Employer identification number<br>27-3522228 |
|---------------------------------------------------------------------|----------------------------------------------|

**990 Schedule O, Supplemental Information**

| Return Reference                            | Explanation                                                                                                                                         |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| FORM 990-EZ, PART I, LINE 8 - OTHER REVENUE | DESCRIPTION INTEREST AMOUNT 227 DESCRIPTION PURCHASE/MERCHANDISE AMOUNT 3,796 DESCRIPTION OCCUPANCY AMOUNT 3,286 TOTAL TO FORM 990-EZ, LINE 8 7,309 |

**990 Schedule O, Supplemental Information**

| Return<br>Reference                           | Explanation                                                                                                                                                                                                                                             |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FORM 990-EZ, PART I, LINE 16 - OTHER EXPENSES | DESCRIPTION BANK CHARGES AMOUNT 3,709 DESCRIPTION CONFERENCES/CONVENTIONS AMOUNT 9,406 DESCRIPTION PURCHASE/MERCHANDISE AMOUNT 3,798 DESCRIPTION SUPPLIES AMOUNT 30,827 DESCRIPTION MEMBERSHIP DUES AMOUNT 71,284 TOTAL TO FORM 990-EZ, LINE 16 119,024 |