

Form **990EZ**
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.

▶ Go to www.irs.gov/Form990EZ for the latest information.

OMB No 1545-1150
2018
Open to Public Inspection

A For the 2018 calendar year, or tax year beginning 01-01-2018, and ending 12-31-2018

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

C Name of organization
SHRM SWFL INC

Number and street (or P O box, if mail is not delivered to street address) Room/suite
2671 BELLINGHAM COURT

City or town, state or province, country, and ZIP or foreign postal code
CAPE CORAL, FL 33991

D Employer identification number
59-1620330

E Telephone number
(239) 938-5922

F Group Exemption Number

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.SHRMSWFL.ORG
J Tax-exempt status (check only one) - 501(c)(3) 501(c)(6) ◀ (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. ▶ \$ 76,508

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	
	2	Program service revenue including government fees and contracts	2	65,349
	3	Membership dues and assessments	3	10,775
	4	Investment income	4	384
	5a	Gross amount from sale of assets other than inventory	5a	
	5b	Less cost or other basis and sales expenses	5b	
	5c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c	
	6	Gaming and fundraising events		
	6a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	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)	6b	
6c	Less direct expenses from gaming and fundraising events	6c		
6d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d		
7a	Gross sales of inventory, less returns and allowances	7a		
7b	Less cost of goods sold	7b		
7c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		
8	Other revenue (describe in Schedule O)	8		
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	76,508	
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	8,075
	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	500
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	
	16	Other expenses (describe in Schedule O)	16	68,827
	17	Total expenses. Add lines 10 through 16	17	77,402
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	-894
	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	45,596
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20	21	44,702

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	45,596	22	44,702
23 Land and buildings		23	
24 Other assets (describe in Schedule O)		24	
25 Total assets	45,596	25	44,702
26 Total liabilities (describe in Schedule O).		26	
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	45,596	27	44,702

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?
 SHRM SWFL IS A LOCAL CHAPTER OF THE NATIONAL SOCIETY FOR HUMAN RESOURCE MANAGEMENT (SHRM) SHRM SWFL IS A GROUP OF HUMAN RESOURCE PROFESSIONALS WHO COME TOGETHER TO DISCUSS ISSUES RELATED TO HUMAN RESOURCE MANAGEMENT AND TO FIND WAYS TO BETTER SERVE THEIR EMPLOYERS AND EMPLOYEES OUR PURPOSE IS TO PROMOTE AND ADVANCE THE UNDERSTANDING AND APPLICATION OF EVERY PHASE OF HUMAN RESOURCE MANAGEMENT, TO ENDEAVOR TO ESTABLISH AND IMPROVE IDEALS, PERFORMANCE AND STANDARDS OF ETHICAL CONDUCT AND RELATIONSHIPS IN THE FIELD OF HUMAN RESOURCES, TO ENCOURAGE COOPERATION AMONG MEMBERS FOR THE EXCHANGE OF IDEAS, DISCUSSION OF PROBLEMS AND THE DISSEMINATION OF INFORMATION IN THE FIELD OF HUMAN RESOURCES, TO DEVELOP GREATER RECOGNITION OF THE HUMAN RESOURCE FUNCTION

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title

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

28 See Additional Data Table			
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>		28a	
29 See Additional Data Table			
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>		29a	
30			
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>		30a	
31 Other program services (describe in Schedule O)			
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>		31a	
32 Total program service expenses (add lines 28a through 31a)		32	77,402

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
KATRINA GOSSIC	4 00	0		
TREASURER				
LOGAN WALLICK	2 50	0		
PAST PRESIDE				
JANICE MONTEAGUDO	12 50	0		
PRESIDENT				
MEGAN VAN DER MEIDE	4 00	0		
VP PROGRAMS				
CHRISTY CARPENTER	3 00	0		
PRESIDENT-EL				
JERRY SCHULZ	0 50	0		
SECRETARY				

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

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include 33, 34, 35a, 35b, 35c, 36, 37a, 37b, 38a, 38b, 39, 39a, 39b, 40a, 40b, 40c, 40d, 40e, 41.

42a The organization's books are in care of KATRINA GOSSIC Telephone no (239) 938-5922 Located at 2671 BELLINGHAM COURT CAPE CORAL, FL ZIP + 4 33991

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include 42b, 42c.

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the tax year 43

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include 44a, 44b, 44c, 44d, 45a, 45b.

	Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46	No

Part VI Section 501(c)(3) organizations only
 All section 501(c)(3) organizations must answer questions 47- 49b and 52, and complete the tables for lines 50 and 51.
 Check if the organization used Schedule O to respond to any question in this Part VI

	Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47	
48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a	
b If "Yes," was the related organization a section 527 organization?	49b	

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

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.

***** Signature of officer	2019-10-30 Date
KATRINA GOSSIC TREASURER Type or print name and title	

Paid Preparer Use Only	Print/Type preparer's name DYAM L SANCHEZ CPA	Preparer's signature	Date 2019-10-30	Check <input type="checkbox"/> if self-employed	PTIN P02079324
	Firm's name ▶ BODINE PERRY LLC			Firm's EIN ▶ 41-2028444	
	Firm's address ▶ 720 GOODLETTE RD N STE 400 NAPLES, FL 341025656			Phone no (239) 262-2279	

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

Additional Data

Software ID:

Software Version:

EIN: 59-1620330

Name: SHRM SWFL INC

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 (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)	
28 LUNCHEONS SHRM SWFL PUTS ON MONTHLY LUNCHEON MEETINGS FOR ITS MEMBERSHIP (Grants \$)	28a	
If this amount includes foreign grants, check here . . . <input type="checkbox"/>		

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

<p>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.</p>	<p>Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)</p>	
<p>29 LUNCHEONS SHRM SWFL PUTS ON MONTHLY LUNCHEON MEETINGS FOR ITS MEMBERSHIP AT EACH LUNCHEON, A SPEAKER IS BROUGHT IN TO DISCUSS TOPICS RELEVANT TO THE HR PROFESSION, AND CERTIFICATION CREDITS ARE AVAILABLE TO ATTENDEES IN ADDITION TO CERTIFICAITON CREDITS/EDUCATION, ATTENDEES ALSO HAVE AN OPPORTUNITY TO NETWORK WITH OTHER HR-RELATED PROFESSIONALS MEETINGS ARE OPEN TO THE PUBLIC, AND WE OFTEN HAVE MANY GUEST ATTENDEES ATTENDANCE VARIES DEPENDING ON THE TIME OF YEAR AND TOPIC, BUT GENERALLY RANGES FROM 60-80 PEOPLE BULK TICKETS EACH YEAR, SHRM SWFL PURCHASES GROUPS OF BULK TICKETS TO THE HR FLORIDA STATE CONFERENCE, THE LARGEST HR CONFERENCE IN THE STATE OUR CHAPTER IS ABLE TO PURCHASE THE TICKETS AT A DEEP DISCOUNT, THEN OFFER THEM TO OUR MEMBERSHIP AT THAT DISCOUNTED PRICE BULK TICKETS CAN ONLY BE PURCHASED BY A CHAPTER, AND NOT AS INDIVIDUALS WE REQUIRE SOMEONE TO BE A MEMBER TO PURCHASE A BULK TICKET, SO THIS SERVICE PPOTENTIALLY BENEFITS UP TO 20-30 PEOPLE ON AVERAGE, WE PURCHASE AND SELL 20-30 BULK TICKETS EACH YEAR SHRM FOUNDATION OUR CHAPTER RAISES MONEY EACH YEAR TO DONATE TO THE SHRM FOUNDATION THE SHRM FOUNDATION PROVIDES THOUGHT LEADERSHIP AND EDUCATIONAL SUPPORT, SPONSORING,FUNDING, AND DRIVING EDUCATIONAL RESEARCH, AND SCHOLoarSHIPS TO HR PROFESSIONALS WE HOST NETWORKING EVENTS TO RAISE MONEY FOR THE DONATION THIS YEAR BETWEEN OUR CASH DONATIONS AND DONATION OF SILENT AUCTION ITEMS TO AUCTIONS BENEFITTING SHRM FOUNDATION, OUR CHAPTER HAS DONATED 2,000 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 ORGANIZAITON, DID NOT, DURING THE YEAR, PAY ANY PREMIUMS, DIRECTLY, OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT</p> <p>(Grants \$) If this amount includes foreign grants, check here . . . <input type="checkbox"/></p>	<p>29a</p>	<p>77,402</p>

SCHEDULE O
(Form 990 or 990-EZ)**Supplemental Information to Form 990 or 990-EZ**

OMB No 1545-0047

2018**Open to Public
Inspection**

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.

▶ Go to www.irs.gov/Form990 for the latest information.

Department of the Treasury

Name of the organization

SHRM SWFL INC

Employer identification number

59-1620330

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990-EZ, PART I, LINE 10	SHRM FOUNDATION ANNUAL CAMPAIGN 2,000 SCHOLARSHIPS 2,320 GULF COAST HUMANE SOCIETY 500 HARRY CHAPIN FOOD BANK 1,000 MULTICULTURAL CENTRE 500 ACT SHELTER 500 DAN MARINO FOUNDATION 25 5 FOUNDATION FOR LEE COUNTY SCHOOLS 1,000

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990-EZ, PART I, LINE 16	EXPENSES APPRECIATION GIFTS 441 EXCELLENCE AWARD 116 BANK SERVICE CHARGES 68 FILING FEES 61 CONFERENCE EXPENSES 8,911 INSURANCE - OFF & DIR 718 MEMBERSHIP MEETING 20,542 MISC EXPENSE 240 NETWORKING EVENT 1,270 PROMOTIONAL ITEMS 1,026 FUNDRAISING 285 OFFICE SUPPLIES 80 POSTAGE/SHIPPING 160 SCHOLARSHIP AUCTION 209 RAFFLE PRIZE 1,926 SPEAKER EXPENSES 35 STATE COUNCIL AUCTION 333 WEBSITE 1,765 PAY PAL FEES 1,110 HR BULK TICKETS 23,040 EDUCATIONAL MATERIALS 6,491 TOTAL 68,827

990 Schedule O, Supplemental Information

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990 Schedule O, Supplemental Information

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FORM 990-EZ, PART III, LINE 31	<p>LUNCHEONS SHRM SWFL PUTS ON MONTHLY LUNCHEON MEETINGS FOR ITS MEMBERSHIP AT EACH LUNCHEON, A SPEAKER IS BROUGHT IN TO DISCUSS TOPICS RELEVANT TO THE HR PROFESSION, AND CERTIFICATION CREDITS ARE AVAILABLE TO ATTENDEES IN ADDITION TO CERTIFICATION CREDITS/EDUCATION, AT TENDEES ALSO HAVE AN OPPORTUNITY TO NETWORK WITH OTHER HR-RELATED PROFESSIONALS MEETINGS ARE OPEN TO THE PUBLIC, AND WE OFTEN HAVE MANY GUEST ATTENDEES ATTENDANCE VARIES DEPENDING ON THE TIME OF YEAR AND TOPIC, BUT GENERALLY RANGES FROM 60-80 PEOPLE BULK TICKETS EACH YEAR, SHRM SWFL PURCHASES GROUPS OF BULK TICKETS TO THE HR FLORIDA STATE CONFERENCE, THE LARGEST HR CONFERENCE IN THE STATE OUR CHAPTER IS ABLE TO PURCHASE THE TICKETS AT A DEEP DISCOUNT, THEN OFFER THEM TO OUR MEMBERSHIP AT THAT DISCOUNTED PRICE BULK TICKETS CAN ONLY BE PURCHASED BY A CHAPTER, AND NOT AS INDIVIDUALS WE REQUIRE SOMEONE TO BE A MEMBER TO PURCHASE A BULK TICKET, SO THIS SERVICE POTENTIALLY BENEFITS UP TO 20-30 PEOPLE ON AVERAGE, WE PURCHASE AND SELL 20-30 BULK TICKETS EACH YEAR SHRM FOUNDATION OUR CHAPTER RAISES MONEY EACH YEAR TO DONATE TO THE SHRM FOUNDATION THE SHRM FOUNDATION PROVIDES THOUGHT LEADERSHIP AND EDUCATIONAL SUPPORT, SPONSORING, FUNDING, AND DRIVING EDUCATIONAL RESEARCH, AND SCHOLARSHIPS TO HR PROFESSIONALS WE HOST NETWORKING EVENTS TO RAISE MONEY FOR THE DONATION THIS YEAR BETWEEN OUR CASH DONATIONS AND DONATION OF SILENT AUCTION ITEMS TO AUCTIONS BENEFITTING SHRM FOUNDATION, OUR CHAPTER HAS DONATED 2,000 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</p>