

Form **990-EZ****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)

2018**Open to Public Inspection**Department of the Treasury
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.

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

A For the 2018 calendar year, or tax year beginning , 2018, and ending , 20	
B Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization Mississippi Defense Lawyers Association, Inc. Number and street (or P O box, if mail is not delivered to street address) Room/suite P O Box 5605 City or town, state or province, country, and ZIP or foreign postal code Brandon, MS 39047-5605
D Employer identification number 64-0665578	
E Telephone number 601-992-8645	
F Group Exemption Number ▶	
G Accounting Method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual Other (specify) ▶	
H Check <input checked="" type="checkbox"/> if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)	
I Website: ▶ www.msdefenselaw.org	
J Tax-exempt status (check only one) — <input type="checkbox"/> 501(c)(3) <input checked="" type="checkbox"/> 501(c) (6) ◀ (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527	
K Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> 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)) are \$500,000 or more, file Form 990 instead of Form 990-EZ ▶ \$ 103,664	

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 <input checked="" type="checkbox"/>	
Revenue	1 Contributions, gifts, grants, and similar amounts received 88,165
	2 Program service revenue including government fees and contracts 15,320
	3 Membership dues and assessments
	4 Investment income 179
	5a Gross amount from sale of assets other than inventory 5a
	b Less: cost or other basis and sales expenses 5b
	c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) 5c
	6 Gaming and fundraising events:
	a Gross income from gaming (attach Schedule G if greater than \$15,000) 6a
Expenses	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) 6b
	c Less: direct expenses from gaming and fundraising events 6c
	d 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
	b Less: cost of goods sold 7b
	c 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 8 103,664
	10 Grants and similar amounts paid (list in Schedule O) 10,500
Net Assets	11 Benefits paid to or for members
	12 Salaries, other compensation, and employee benefits
	13 Professional fees and other payments to independent contractors 40,300
	14 Occupancy, rent, utilities, and maintenance
	15 Printing, publications, postage, and shipping 18,988
	16 Other expenses (describe in Schedule O) 31,012
	17 Total expenses. Add lines 10 through 16 100,800
18 Excess or (deficit) for the year (Subtract line 17 from line 9) 2,864	
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) 74,545	
20 Other changes in net assets or fund balances (explain in Schedule O)	
21 Net assets or fund balances at end of year. Combine lines 18 through 20 77,409	

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 106421

Form **990-EZ** (2018)

SCANNED AUG 20 2019

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	74,545	22 77,409
23 Land and buildings		23
24 Other assets (describe in Schedule O)		24
25 Total assets	74,545	25 77,409
26 Total liabilities (describe in Schedule O)		26
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	74,545	27 77,409

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? To improve the admin of justice in the legal system

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 Joint Seminar of MDLA and MS Claims Association held November 1, 2018, classroom style seminar with 87 participants		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	28a	
29 Distribution of The Quarterly publication, serving 475 members and 187 judiciary		
(Grants \$) If this amount includes foreign grants, check here <input type="checkbox"/>	29a	
30 Seminars for Young Lawyers; Lunch & Learn Seminars conducted at the MC and UM Schools of Law - 6 sessions per school with an average of 30 participants		
(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	

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
R. Douglas Vaughn President	4	0	0	0
Rochelle R. Morgan President Elect	3	0	0	0
Jonathan S. Masters Secretary-Treasurer	2	0	0	0
J. Michael Coleman Vice President	1	0	0	0
Trace D. McRaney Vice President	1	0	0	0
James L. Wilson, IV Vice President	1	0	0	0
R. Lane Dossett Director	1	0	0	0
Jacob O. Malatesta Director	1	0	0	0
E. Russell McNees Director	1	0	0	0
Penny B. Lawson Director	1	0	0	0
Jessica B. McNeel Director	1	0	0	0
Jane L. Brown Executive Director	35	40,300	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 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	33	✓
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	34	✓
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)?	35a	✓
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	35b	
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	35c	✓
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	36	✓
37a Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a		
b Did the organization file Form 1120-POL for this year?	37b	✓
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?	38a	✓
b If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9	39a	
b Gross receipts, included on line 9, for public use of club facilities	39b	
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	40b	
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 ▶		
d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization ▶		
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	40e	✓
41 List the states with which a copy of this return is filed ▶		
42a The organization's books are in care of ▶ <u>Jane L. Brown</u> Telephone no. ▶ <u>601-992-8645</u> Located at ▶ <u>414 Millrun Road, Brandon, MS</u> ZIP + 4 ▶ <u>39047-9014</u>		
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 ▶ See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).	42b	✓
c 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 ▶	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		<input type="checkbox"/>
44a Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a	✓
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	✓
c Did the organization receive any payments for indoor tanning services during the year?	44c	✓
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	44d	
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a	✓
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		<input checked="" type="checkbox"/>

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47–49b and 52, and complete the tables for lines 50 and 51.

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

- 47** Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II

	Yes	No
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 ▶

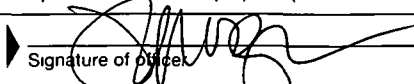
- 51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

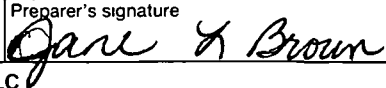
(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

- 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.

Sign Here		Date <u>4/16/19</u>
	Roechelle R. Morgan, President	
	Type or print name and title	

Paid Preparer Use Only	Print/Type preparer's name Jane L. Brown	Preparer's signature 	Date <u>4/18/19</u>	Check <input checked="" type="checkbox"/> if self-employed	PTIN 263-17-1464
	Firm's name ▶ PB & J Enterprises, LLC	Firm's EIN ▶ 47-2680052			
	Firm's address ▶ 414 Millrun Road, Brandon, MS 39047-9014	Phone no 601-992-8645			

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

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2018

**Open to Public
Inspection**

Name of the organization

Mississippi Defense Lawyers Association, Inc.

Employer identification number

64-0665578

Part I, Line 10 - Grants and similar amounts paid:

University of MS Foundations (Scholarships)	\$2,000
University of MS Foundations (Professorship Endowment)	2,000
University of MS Foundations (Lifetime Achievement Award)	1,000
406 University Avenue, Oxford, MS 38655-4389	
Mississippi College School of Law (Scholarships)	2,000
Mississippi College School of Law (Professorship Endowment)	2,000
151 Griffith Street, Jackson, MS 39201	
National Foundation for Judicial Excellence	1,500
55 West Monroe, Suite 2000, Chicago, IL 60603	
TOTAL	10,500

Part I, Line 16, Other Expenses

Meetings and Travel	28,329
Telephone, Internet, Website	2,183
Young Lawyers and Student Chapter Functions	500
TOTAL	31,012

Part IV - List of Officers, Directors, Trustees and Key Employees

Lawrence J. Tucker, Jr.	Director	1 hr/wk	(c)	0	(d)	0	(e)	0
Mary Margaret Kuhlmann	Director	1 hr/wk	(c)	0	(d)	0	(e)	0
J. Seth McCoy	Director	1 hr/wk	(c)	0	(d)	0	(e)	0
Kari L. Sutherland	Director	1 hr/wk	(c)	0	(d)	0	(e)	0
Benjamin C. Lewis	At Large Member	1 hr/wk	(c)	0	(d)	0	(e)	0
Shea S. Scott	At Large Member	1 hr/wk	(c)	0	(d)	0	(e)	0
Casey D. Younger	At Large Member	1 hr/wk	(c)	0	(d)	0	(e)	0
Jonathan H. Still	Young Lawyers Liaison	1 hr/wk	(c)	0	(d)	0	(e)	0