

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 instructions and the latest information.

OMB No. 1545-1150
2019
Open to Public Inspection

A For the 2019 calendar year, or tax year beginning 01-01-2019, and ending 12-31-2019

- 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 **\$ 67,840**

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	49,491
	3	Membership dues and assessments	3	17,383
	4	Investment income	4	18
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less: cost or other basis and sales expenses	5b	0
	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	
	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	0
c	Less: direct expenses from gaming and fundraising events	6c	0	
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	0	
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c		
8	Other revenue (describe in Schedule O)	8	948	
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	67,840	

Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	4,025
	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	750
	14	Occupancy, rent, utilities, and maintenance	14	704
	15	Printing, publications, postage, and shipping	15	192
	16	Other expenses (describe in Schedule O)	16	52,952
	17	Total expenses. Add lines 10 through 16	17	58,623
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	9,217
	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	44,702
	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	53,919

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		No
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O. See instructions.		No
35a	Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?		No
b	If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O		
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III		No
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N		No
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. ▶ 37a _____		
b	Did the organization file Form 1120-POL for this year?		No
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?		No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved	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 ▶ _____ 0 ; section 4912 ▶ _____ 0 ; section 4955 ▶ _____ 0		
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		
c	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958	_____ 0	
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization	_____ 0	
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T		No
41	List the states with which a copy of this return is filed. ▶ FL _____		
42a	The organization's books are in care of ▶ <u>Katrina Gossic</u> Telephone no. ▶ <u>(239) 938-5922</u> Located at ▶ <u>2671 Bellingham Court Cape Coral, FL</u> ZIP + 4 ▶ <u>33991</u>		

		Yes	No
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).		No
c	At any time during the calendar year, did the organization maintain an office outside the U.S.? If "Yes," enter the name of the foreign country: ▶ _____		No
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 _____		

		Yes	No
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		No
b	Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		No
c	Did the organization receive any payments for indoor tanning services during the year?		No
d	If "Yes," to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		No
45b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)		No

	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
NONE				

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
NONE		

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 Katrina Gossic Treasurer Type or print name and title	2020-11-12 Date
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Paid Preparer Use Only	Print/Type preparer's name Sean M Nolan CPA	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN P00837447
	Firm's name ▶ Rogers Wood Hill Starman & Gustason PA			Firm's EIN ▶ 59-1362099	
	Firm's address ▶ 2375 Tamiami Trail North Suite 110 Naples, FL 34103			Phone no. (239) 262-1040	

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

Additional Data

Software ID: 19009920
Software Version: 2019v5.0
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.)	
<p>28</p> <p>LUNCHEONS: SHRM SWFL PUTS ON MONTHLY LUNCHEON MEETINGS FOR ITS MEMBERSHIP. AT EACH LUNCHEON, A SPEAKER IS BROUGHT IN TO DISCUSS TOPICS RELEVANT TOTHE HR PROFESSION, AND CERTIFICATION CREDITS ARE AVAILABLE TO ATTENDEES.IN ADDITION TO CERTIFICAITON CREDITS/EDUCATION, ATTENDEES ALSO HAVE ANOPPORTUNITY TO NETWORK WITH OTHER HR-RELATED PROFESSSIONALS. MEETINGS AREOPEN TO THE PUBLIC, AND WE OFTEN HAVE MANY GUEST ATTENDEES. ATTENDANCEVARIES DEPENDING ON THE TIME OF YEAR AND TOPIC, BUT GENERALLY RANGES FROM60-80 PEOPLE.BULK TICKETS: EACH YEAR, SHRM SWFL PURCHASES GROUPS OF BULK TICKETS TO THEHR FLORIDA STATE CONFERENCE, THE LARGEST HR CONFERENCE IN THE STATE. OURCHAPTER IS ABLE TO PURCHASE THE TICKETS AT A DEEP DISCOUNT, THEN OFFER THEMTO OUR MEMBERSHIP AT THAT DISCOUNTED PRICE. BULK TICKETS CAN ONLY BEPURCHASED BY A CHAPTER, AND NOT AS INDIVIDUALS. WE REQUIRE SOMEONE TO BE AEMBER TO PURCHASE A BULK TICKET, SO THIS SERVICE PPOTENTIALLY BENEFITS UPTO 20-30 PEOPLE. ON AVERAGE, WE PURCHASE AND SELL 20-30 BULK TICKETS EACHYEAR.SHRM FOUNDATION: OUR CHAPTER RAISES MONEY EACH YEAR TO DONATE TO THE SHRMFOUNDATION. THE SHRM FOUNDATION PROVIDES THOUGHT LEADERSHIP ANDEDUCATIONAL SUPPORT, SPONSORING,FUNDING, AND DRIVING EDUCATIONAL RESEARCH,AND SCHOLoarSHIPS TO HR PROFESSIONALS. WE HOST NETWORKING EVENTS TO RAISEMONEY FOR THE DONATION. THIS YEAR BETWEEN OUR CASH DONATIONS AND DONATIONOF SILENT AUCTION ITEMS TO AUCTIONS BENEFITTING SHRM FOUNDATION, OURCHAPTER HAS DONATED \$2,000.</p> <p>(Grants \$ 47,763)</p> <p style="text-align: right;">If this amount includes foreign grants, check here . . . ► <input type="checkbox"/></p>	28a	

Form 990EZ, 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
Christy Carpenter President	12.00	0		
Shellie Halstead President Elect	5.00	0		
Janice Monteagudo Past President	4.00	0		
Katrina Gossic Treasurer	4.00	0		
Laura Siebenmorgan Secretary	3.00	0		
Christine Christensen VP - Membership	3.00	0		
Megan vander Meide VP - Programs	3.00	0		
Karen Jaye Director	1.00	0		
Suzanne Boy Director	1.00	0		
Kayla Fridd Director	1.00	0		
Nancy Korista Director	1.00	0		
Molly Grubbs Director	1.00	0		
Ainsley Lump Director	1.00	0		
Brian Sauls Director	1.00	0		
Shannon Fibbe Director	1.00	0		

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(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
Kim Becker Director	1.00	0		

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

2019**Open to Public Inspection**

Department of the Treasury

Internal Revenue Service

Name of the organization
SHRM SWFL Inc

Employer identification number

59-1620330

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Revenue.1	Monthly raffle \$948

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.1001	Advertising and Promotion \$602

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.1002	Office Expenses \$107

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.1007	Conferences, Conventions, and Meetings \$17424

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.1012	Insurance \$728

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.1	Membership Meetings \$24290

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.2	Website Fees \$2094

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.3	National Membership \$1801

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.4	PayPal fees \$1789

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.5	Membership Appreciation \$1392

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.6	Miscellaneous \$1346

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.7	Scholarship \$835

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.8	Gifts \$329

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.10	Awards \$112

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.11	Filing Fee \$61

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses.12	Bank Service Charges \$42