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)

▶ 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 1545-0047

2019

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2019 calendar year, or tax year beginning , 2019, and ending , 20

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

C Name of organization
ROTARY CLUB OF CARROLLTON-FARMERS BRANCH

Number and street (or P.O. box if mail is not delivered to street address) | Room/suite
PO BOX 417

City or town, state or province, country, and ZIP or foreign postal code
CARROLLTON, TX 75006

D Employer identification number
75-6067744

E Telephone number
972-824-2133

F Group Exemption Number ▶

G Accounting Method: ☐ Cash ☑ Accrual Other (specify) ▶

Website: ▶ WWW.CFBROTARY5810.ORG

Tax-exempt status (check only one) – ☐ 501(c)(3) ☑ 501(c)(4)◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

H Check ▶ ☑ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

J Form of organization: ☐ Corporation ☐ Trust ☑ Association ☐ Other

K 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 . . . . . ▶ $ 136,451

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	52,999
	2	Program service revenue including government fees and contracts		2	18,274
	3	Membership dues and assessments		3	54,210
	4	Investment income		4	3
	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 9,675		
	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 1,800		
	c	Less: direct expenses from gaming and fundraising events	6c 500		
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		6d	10,975
	7a	Gross sales of inventory, less returns and allowances	7a 352		
	b	Less: cost of goods sold	7b 362		
	c	Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)		7c	-10
	8	Other revenue (describe in Schedule O)		8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 6c, 6d, 7c, and 8		9	136,450
Expenses	10	Grants and similar amounts paid (list in Schedule O)		10	59,539
	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	
	14	Occupancy, rent, utilities, and maintenance		14	
	15	Printing, publications, postage, and shipping		15	1,173
	16	Other expenses (describe in Schedule O)		16	58,308
	17	**Total expenses.** Add lines 10 through 16		17	119,020
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 9)		18	17,430
	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	30,182
	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	47,612

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	36,021	22	55,175
23	Land and buildings		23	
24	Other assets (describe in Schedule O)	2,599	24	2,716
25	Total assets	38,620	25	57,891
26	Total liabilities (describe in Schedule O)	8,438	26	10,279
27	Net assets or fund balances (line 27 of column (B) must agree with line 21)	30,182	27	47,612

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? SUPPORT THE LOCAL COMMUNITY AND ROTARY INTL

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

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 GLOBAL GRANT - JUAN SEBASTIAN CASTANEDA

(Grants $ 22,875) If this amount includes foreign grants, check here ☑ 28a 22,875

29 SIGNATURE PROJECT: WE ARE PARTNERING WITH THE CITY OF CARROLLTON TO PLAN, DEVELOP, AND BUILD A PARK THAT NABLES CHILDREN WITH VARYING PHYSICAL ABILITIES TO PLAY TOGETHER.

(Grants $ 10,000) If this amount includes foreign grants, check here ☐ 29a 10,000

30 COMMUNITY CONTRIBUTIONS. CONTRIBUTIONS TO LOCAL COMMUNITY ORGANIZATIONS

(Grants $ 6,500) If this amount includes foreign grants, check here ☐ 30a 6,500

31 Other program services (describe in Schedule O)

(Grants $ 20,164) If this amount includes foreign grants, check here ☐ 31a 20,164

32 Total program service expenses (add lines 28a through 31a) 32 59,539

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
SONJA DODDS, PRESIDENT	12			
JOHN DODD, PRESIDENT ELECT	8			
BILL BEXLEY, TREASURER/EXECUTIVE DIRECTOR	10			
ERIN CARTER, SECRETARY	8			
DAVID HALE, IMMEDIATE PAST PRESIDENT	4			
VICTORIA MENDOZA, COMMUNITY SERVICE CHAIR	4			
BEN HOGAN, VOCATIONAL SERVICE CHAIR	4			
LAURIE WILSON, CLUB SERVICE CHAIR	4			
REGINA EDWARDS, INTERNATIONAL SERVICE CHAIR	4			
MARK SUTHERLAND, ROTARY FOUNDATION CHAIR	4			
BILL LOVELL, PUBLIC RELATIONS CHAIR	4			
TIMOTHY ISALY, YOUTH SERVICES DIRECTOR	4			

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 0			
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 ▶ BILL BEXLEY Telephone no. ▶ 972-446-9827			
	Located at ▶ 5932 CAMBRIDGESHIRE DR, CARROLLTON, TEXAS 75007 ZIP + 4 ▶ 75007			
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			
			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	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		✓

		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		✓

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.

Sign Here

▶ Signature of officer — Date

▶ Bill Baxley Treasurer — 11/13/20
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ▶ — Firm's EIN ▶

Firm's address ▶ — Phone no.

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.

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2019

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Name of the organization

ROTARY CLUB OF CARROLLTON-FARMERS BRANCH

Employer identification number

75-6067744

FORM 990EZ, PART I, LINE 18, LIST OF GRANTS PAID IN EXCESS OF $5,000. CITY OF CARROLLTON FOR OUR SIGNATURE PROJECT $10,000; GLOBAL GRANT FOR JUAN SEBASTIAN CASTANEDA: $22,875

FORM 990EZ, PART I, LINE 16, DESCRIPTION OF OTHER EXPENSES. OTHER EXPENSES PRIMARILY CONSIST OF FUNDS EXPENDED IN SUPPORT OF CLUB OPERATIONS SUCH AS AMOUNTS PAID FOR THE USE OF OUR MEETING ROOM AND MEALS.

FORM 990EZ, PART II, LINE 24, DESCRIPTION OF OTHER ASSETS. OTHER ASSETS CONSIST OF AMOUNTS DUE FROM MEMBERS FOR UNPAID DUES AND MEALS.

FORM 990EZ, PART II, LINE 26, DESCRIPTION OF LIABILITIES. REPRESENTS EXPENSES INCURRED BY THE CLUB THAT WERE NOT SETTLED IN CASH PRIOR TO YEAR END SUCH AS MEALS AND CONTRIBUTIONS TO ORGANIZATIONS.

FORM 990EZ, PART III, LINE 31, OTHER PROGRAM SERVICES. CONSISTS OF AMOUNTS CONTRIBUTED TO LOCAL COMMUNITY ORGANIZATIONS.

Name of the organization | Employer identification number