

## INFORMATION NEEDED FOR FORM 990

1. Year of formation. **Rotary International was founded in 1905**
2. Formed in NC? **Rotary District 7670 was established in 1915**
3. Who will sign the return? **Past District Governor, William T. Biddle, Jr.**
4. They had grants on the statement of activities (income) of \$103,673. If any of these were \$5,000 or more from a single donor we will need the donor name and address. **No, most grants were in the amount of \$2,500.**
5. They had grants on the functional expenses of \$101,777. If any of these grants were \$5,000 or more we will need the recipient name, address, EIN, IRC section (501(c)3, etc). Purpose of grant.  
**No \$5,000 grants. These are funds provided by The Rotary Foundation from contribution made to the Foundation three years ago. The grants are used in western North Carolina to fund club activities in the various communities.**

1. A list of all contributors, if any, who gave or pledged \$5000 or more during the tax year. Please give the contributors name, address, and the total of each contribution. In addition, if the donation was non-cash, please describe the property donated and give the date received. **None**
2. A list of officers, directors, trustees, board members, and key employees is needed. Please provide each person's name, title, average number of hours per week devoted to the position, total compensation (if any), dollar value of fringe benefits paid on their behalf (health insurance, pension contributions, etc.) (if any), and expense allowances paid (not direct reimbursements) (if any). A key employee is considered any person having powers similar to those of officers, directors, trustees, or board members. Two usual candidates would be a chief financial officer and the executive director.

<b>William T. Biddle, Jr.</b>	<b>District Governor</b>
<b>Carol King</b>	<b>PDG, District Foundation Chair</b>
<b>Charles E. Reiley</b>	<b>Past District Governor</b>
<b>James O. Efland</b>	<b>Past District Governor</b>
<b>Richard Johannes</b>	<b>Past Club President</b>
<b>Isaac Owolabi</b>	<b>District Governor-Elect</b>
<b>Regina D. Hartley</b>	<b>Youth Services Chair</b>
<b>Milton Stork</b>	<b>District Finance Chair</b>
<b>Gary D. Dills</b>	<b>Immediate Past District Governor</b>
<b>John Yermack, Jr.</b>	<b>Membership Chair</b>
<b>Billi J. Black</b>	<b>Past District Governor</b>
<b>Tiffany Ervin</b>	<b>District Governor Nominee</b>
<b>G. David Waechter</b>	<b>Assistant Governor</b>
<b>Franklin Dean</b>	<b>Past District Governor</b>
<b>Peggy Wike</b>	<b>Assistant Governor</b>
<b>Margaret Gormley-Chapman</b>	<b>Executive Secretary</b>

Time spent per week: approximately 10 hours. There are no expense allowances. Reimbursement given only for expenses incurred.

3. Number of officers and trustees permitted to vote on organization business at board meetings.

All listed with the exception of the District Governor-Elect, District Governor Nominee, and Executive Secretary

4. Are any officers, directors, or trustees related to each other through family or business relationships? If so, identify and explain the relationship.

No relationships.

5. Does the organization have a written conflict of interest policy?

Not really. It has a standard operating procedure only.

6. A list of **former** officers, directors, trustees, board members, and key employees who continue to receive compensation and/or benefits. Please provide each person's name, address, total loans and advances, total compensation, dollar value of fringe benefits paid on their behalf (health insurance, pension contributions, etc.) (if any), and expense allowances paid (not direct reimbursements) (if any).

None

7. Copy of last completed W3      N/A

8. Copy of last completed 1096      N/A

9. The number of employees (other than persons listed in item 2) receiving over \$100,000 in compensation for the tax year (if any).

- From only the employees receiving over \$100,000 (other than the persons listed in item 2), please provide a list of the five highest-paid employees including each person's name, title, average number of hours worked per week, total compensation, fringe benefits paid on their behalf, and expense allowances.

- For only those employees listed in Question 8, please explain any family or business relationship to board members, officers, directors, trustees, and key employees.

- None

10. Total number of independent service professionals or firms (doctors, lawyers, consultants, etc.) who were paid over \$100,000 during the tax year (if any).

- From only the independent service professionals or firms who were paid over \$100,000 (if any), please provide a list of the five highest-paid professionals or

firms including each person's or firm's name, address, type of service provided, and total amount paid.

- For only those independent contractors and/or firms listed in Question 9, please explain any family or business relationship to board members, officers, directors, trustees, and key employees.

None

11. Total number of independent contractors for other services who were paid over \$100,000 during the tax year (if any).

- From only other independent contractors who were paid over \$100,000 (if any), please provide a list of the five highest paid including each person's or firm's name, address, type of service provided, and total amount paid.
- For only those independent contractors listed in Question 8, please explain any family or business relationship to board members, officers, directors, trustees, and key employees.

None

12. Answers to the following questions:

- a. Did the client engage in any new activities not previously reported? No
- b. Any changes to governing documents (provide copies)? No
- c. Any unrelated business income (i.e. advertising, rental income)? No
- d. Was there a liquidation, termination or substantial contraction? No
- e. Related to any other organizations through common governing bodies, trustees, or officers? Rotary International
- f. Any political/lobbying expenditures? If yes, to whom & how much? No
- g. Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value? If so, what was the value of those items donated? (NOTE: The IRS does not require the organization to give this value.) No
- h. Comply with public inspection requirements? (Requests from outside parties to review the 990) No
- i. Comply with disclosure requirements re: quid pro quo requirements? N/A
- j. Incur in-house lobbying expenditures >\$2000? No
- k. During the year own 50% or greater interest in a taxable corp. or partnership? No
- l. Have section 403(b) annuity plan for your employees? No
- m. Was the organization involved in any excess benefit transactions? No
- n. 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? (For example: bank accounts, securities accounts, or other financial accounts) No
- o. During the year did the organization maintain an office in a foreign country? If so, please list country. No

13. If any grants or allocations were made to organizations or individuals, please list the type of grant (i.e. scholarship, research grant, etc.), donee's name, address, and the amount given. **None.**

14. Did you use any volunteers during the year? If so, how many?

The entire Rotary District is composed of volunteers, individuals who give their time, talent, and treasure to support the efforts of *Service Above Self* internationally and in their communities. There are approximately 2,200 club members in District 7670 united for the foregoing purpose