

Form **990-EZ**

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 black lung benefit trust or private foundation)

▶ Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form.  
▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

OMB No. 1545-1150

# 2009

**Open to Public Inspection**

**A For the 2009 calendar year, or tax year beginning** JUL 1, 2009 **and ending** JUN 30, 2010

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type. See Specific Instructions.	<b>C Name of organization</b> <b>WESTERN PENSION &amp; BENEFITS CONFERENCE</b> <b>ORANGE COUNTY CHAPTER</b> Number and street (or P.O. box, if mail is not delivered to street address) Room/suite <b>24881 ALICIA PARKWAY #E343</b> City or town, state or country, and ZIP + 4 <b>LAGUNA HILLS, CA 92653-4617</b>	<b>D Employer identification number</b> <b>33-0706599</b>  <b>E Telephone number</b> <b>(949) 472-4148</b>  <b>F Group Exemption Number</b> ▶
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• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).

**G Accounting method:**  Cash  Accrual  
Other (specify) ▶

**I Website:** ▶ WWW.WESTERNPENSION.ORG **H Check**  if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

**J Tax-exempt status** (check only one) —  501(c) ( 6 ) ◀ (insert no.)  4947(a)(1) or  527

**K Check**  if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A Form 990-EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return.

**L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$500,000 or more, file Form 990 instead of Form 990-EZ** ▶ \$ **51,059.**

**Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See the instructions for Part I.)

	Description	Code	Amount
<b>Revenue</b>	1 Contributions, gifts, grants, and similar amounts received	1	
	2 Program service revenue including government fees and contracts	2	43,780.
	3 Membership dues and assessments	3	7,180.
	4 Investment income	4	99.
	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 Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here <input type="checkbox"/>		
	a Gross revenue (not including \$ of contributions reported on line 1)	6a	
	b Less: direct expenses other than fundraising expenses	6b	
c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c		
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 ▶ )	8		
9 <b>Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	9	51,059.	
<b>Expenses</b>	10 Grants and similar amounts paid (attach schedule)	10	
	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	785.
	15 Printing, publications, postage, and shipping	15	
	16 Other expenses (describe ▶ )	16	40,153.
17 <b>Total expenses.</b> Add lines 10 through 16	17	40,938.	
<b>Net Assets</b>	18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	10,121.
	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	43,753.
	20 Other changes in net assets or fund balances (attach explanation)	20	11.
	21 <b>Net assets or fund balances at end of year.</b> Combine lines 18 through 20	21	53,885.

**Part II Balance Sheets.** If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ.

(See the instructions for Part II.)

	(A) Beginning of year	(B) End of year
22 Cash, savings, and investments	41,790.	52,707.
23 Land and buildings		
24 Other assets (describe ▶ <u>OTHER DEPRECIABLE ASSETS</u> )	1,963.	1,178.
25 <b>Total assets</b>	43,753.	53,885.
26 <b>Total liabilities</b> (describe ▶ )	0.	0.
27 <b>Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	43,753.	53,885.

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LHA For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

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<b>Part III Statement of Program Service Accomplishments</b> (See the instructions for Part III.)	<b>Expenses</b> <small>(Required for section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts; optional for others.)</small>
What is the organization's primary exempt purpose? <b>SEE STATEMENT 6</b>	
Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.	
<b>28 SEE STATEMENT 5</b>	
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>28a 30,025.</b>
<b>29</b>	
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>29a</b>
<b>30</b>	
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>30a</b>
<b>31 Other program services (attach schedule)</b>	
(Grants \$ _____) If this amount includes foreign grants, check here <input type="checkbox"/>	<b>31a</b>
<b>32 Total program service expenses (add lines 28a through 31a)</b>	<b>32 30,025.</b>

**Part IV List of Officers, Directors, Trustees, and Key Employees.** List each one even if not compensated. (See the instructions for Part IV.)

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-.)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
MARGARET MARTINAZZI, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA	TECHNICAL LUNCH FORUM CHAIR	1.00 0.	0.	0.
KATHLEEN BASS, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	PRESIDENT-ELECT	1.00 0.	0.	0.
HARLEY BJELLAND, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA	MEMBERSHIP CHAIR	1.00 0.	0.	0.
MARK D. MURPHY, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	DIR AT LARGE	1.00 0.	0.	0.
GARY CROUCH, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	TREASURER	1.00 0.	0.	0.
STUART HACK, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	PRESIDENT	1.00 0.	0.	0.
DOUG JONES, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	DIR AT LARGE	1.00 0.	0.	0.
JULIETTE MEUNIER, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA	DIR AT LARGE	1.00 0.	0.	0.
RICK BLAIN, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	SECRETARY	1.00 0.	0.	0.
ALISON FAY, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	PAST PRESIDENT	1.00 0.	0.	0.
DYLAN PORTER, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	DIR AT LARGE	1.00 0.	0.	0.
DOUG VAN GALDER, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA	CORPORATE SPONSOR CHAIR	1.00 0.	0.	0.
BRENDA CHING, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA 92653	PROGRAMS CHAIR/WBC COMM REP	1.00 0.	0.	0.
DEBORAH KUSMIERZ, 24881 ALICIA PARKWAY #E343, LAGUNA HILLS, CA	PROGRAMS CO-CHAIR	1.00 0.	0.	0.

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**Part V Other Information** (Note the statement requirements in the instructions for Part V.)

			Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	33		X
34	Were any changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the changes	34		X
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported on Form 990-T, attach a statement explaining why the organization did not report the income on Form 990-T.			
a	Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section 6033(e) notice, reporting, and proxy tax requirements?	35a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	35b	N/A	
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Sch. N	36		X
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions. <span style="float:right;">▶ 37a</span> <u>0.</u>			
b	Did the organization file Form 1120-POL for this year?	37b		X
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 period covered by this return?	38a		X
b	If "Yes," complete Schedule L, Part II and enter the total amount involved <span style="float:right;">▶ 38b</span> <u>N/A</u>			
39	Section 501(c)(7) organizations. Enter:			
a	Initiation fees and capital contributions included on line 9 <span style="float:right;">▶ 39a</span> <u>N/A</u>			
b	Gross receipts, included on line 9, for public use of club facilities <span style="float:right;">▶ 39b</span> <u>N/A</u>			
40a	Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ <u>N/A</u> ; section 4912 ▶ <u>N/A</u> ; section 4955 ▶ <u>N/A</u>			
b	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b		N/A
c	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <span style="float:right;">▶</span> <u>N/A</u>			
d	Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization <span style="float:right;">▶</span> <u>N/A</u>			
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		X
41	List the states with which a copy of this return is filed. ▶ <u>CA</u>			
42a	The organization's books are in care of ▶ <u>JENNIFER BODENHOEFER</u> Telephone no. ▶ <u>(949) 472-4148</u> Located at ▶ <u>24881 ALICIA PARKWAY, #E343, LAGUNA HILLS, CA</u> ZIP + 4 ▶ <u>92653-4617</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)?	42b		X
	If "Yes," enter the name of the foreign country: ▶ _____			
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.			
c	At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42c		X
	If "Yes," enter the name of the foreign country: ▶ _____			
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 <span style="float:right;">▶ 43</span> <u>N/A</u>			
44	Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ	44		X
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If "Yes," Form 990 must be completed instead of Form 990-EZ	45		X

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**Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.** All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 46-49b and complete the tables for lines 50 and 51.

- 46 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I Yes No
- 47 Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II
- 48 Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E
- 49a Did the organization make any transfers to an exempt non-charitable related organization?
- 49b If "Yes," was the related organization a section 527 organization?
- 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 address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
N/A				

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 address of each independent contractor paid more than \$100,000	(b) Type of service	(c) Compensation
N/A		

d Total number of other independent contractors each receiving over \$100,000 ▶

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: *Gary Crouch* Date: *8/19/10*

**GARY CROUCH** TREASURER  
Type or print name and title

**Paid Preparer's Use Only** Preparer's signature: *[Signature]* Date: *8/19/10* Check if self-employed:  Preparer's identifying number (See instr.):

Firm's name (or yours if self-employed), address, and ZIP + 4: **LINK, MURREL & COMPANY**  
**18831 BARDEEN AVENUE, STE. 200**  
**IRVINE, CA 92612-1520**

EIN: Phone no. **(949) 261-1120**

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

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2009 DEPRECIATION AND AMORTIZATION REPORT

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Asset No.	Description	Date Acquired	Method	Life	C o n v	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
23	DELL COMPUTER	02/28/07	SL	5.00		HXL6	1,327.				1,327.	663.		265.	928.
24	PROJECTOR	02/28/07	SL	5.00		HXL6	2,599.				2,599.	1,300.		520.	1,820.
	* TOTAL 990-EZ PG 1 DEPR						3,926.				3,926.	1,963.		785.	2,748.

FORM 990-EZ	OTHER EXPENSES	STATEMENT	1
DESCRIPTION		AMOUNT	
PROGRAM SERVICES		30,025.	
MANAGEMENT		9,878.	
MEMBERSHIP		250.	
TOTAL TO FORM 990-EZ, LINE 16		40,153.	

FORM 990-EZ	OTHER CHANGES IN NET ASSETS OR FUND BALANCES	STATEMENT	2
DESCRIPTION		AMOUNT	
PRIOR PERIOD ADJUSTMENT		11.	
TOTAL TO FORM 990-EZ, LINE 20		11.	

FORM 990-EZ	OCCUPANCY, RENT, UTILITIES AND MAINTENANCE	STATEMENT	3
DESCRIPTION		AMOUNT	
DEPRECIATION		785.	
TOTAL TO FORM 990-EZ, LINE 14		785.	

FORM 990-EZ

INFORMATION REGARDING TRANSFERS  
ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

STATEMENT 4

A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS,  
DIRECTLY OR INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL  
BENEFIT CONTRACT? . . . . . [ ] YES [X] NO

B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS,  
DIRECTLY OR INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT? . . [ ] YES [X] NO

THE ORANGE COUNTY CHAPTER OF THE WESTERN PENSION & BENEFITS CONFERENCE PROMOTES AN EXCHANGE OF INFORMATION AND IDEAS AMONG EMPLOYEE BENEFITS PROFESSIONALS. OUR MEMBERS INCLUDE ERISA ATTORNEYS, CERTIFIED PUBLIC ACCOUNTANTS, THIRD PARTY ADMINISTRATORS, INVESTMENT INDUSTRY BENEFITS SPECIALISTS, ACTUARIES, BENEFITS CONSULTANTS AND PLAN SPONSORS' IN-HOUSE BENEFITS PROFESSIONALS.

THROUGH THE MONTHLY BREAKFAST FORUM PRESENTATIONS AND PERIODIC TECHNICAL LUNCH FORUMS, THE ORANGE COUNTY CHAPTER PROVIDES A FORUM FOR DIALOGUE BETWEEN ITS MEMBERS. THESE MEETINGS ENCOURAGE FULL AUDIENCE PARTICIPATION AND EXCHANGE OF PRACTICAL SOLUTIONS TO TECHNICAL ISSUES. BENEFIT PROFESSIONALS LEAD THE MEETINGS, WITH AN EMPHASIS ON TOPICS REFLECTING CURRENT BENEFIT TRENDS AND REGULATORY GUIDANCE.

THE MONTHLY BREAKFAST MEETINGS AVERAGE 50 IN ATTENDANCE.



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