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Form **990-PF**

# Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

OMB No 1545-0052

**2007**Department of the Treasury  
Internal Revenue Service

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2007, or tax year beginning , and ending

G Check all that apply ☐ Initial return ☐ Final return ☒ Amended return ☐ Address change ☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.THE ROCCO AND NANCY ORTENZIO FAMILY FOUNDATION  
F/K/A THE ORTENZIO FAMILY FOUNDATIONNumber and street (or P O box number if mail is not delivered to street address) Room/suite  
4718 GETTYSBURG ROAD - SUITE 405

City or town, state, and ZIP code

MECHANICSBURG PA 17055

A Employer identification number  
23-6805409B Telephone number (see page 10 of the instructions)  
717-972-1305C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the

85% test, check here and attach computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end  
of year (from Part II, col (c),  
line 16) ▶ \$ 13,852,735J Accounting method: ☒ Cash ☐ Accrual  
☐ Other (specify)

(Part I, column (d) must be on cash basis)

## Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see pg 11 of the instructions))

(a) Revenue and  
expenses per  
books(b) Net investment  
income(c) Adjusted net  
income(d) Disbursements  
for charitable  
purposes  
(cash basis only)

SCANNED AUG 10 2010 RECEIVED JUL 3 2010 STMT 1	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3	Interest on savings and temporary cash investments	10,801	7,879		
	4	Dividends and interest from securities	546,803	546,431		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	595,518			
	b	Gross sales price for all assets on line 6a 5,865,755				
	7	Capital gain net income (from Part IV, line 2)		595,518		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold 2010					
c	Gross profit or (loss) (attach schedule)					
11	Other income (attach schedule)					
12	Total. Add lines 1 through 11	1,152,939	1,137,102	0		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STMT 2	3,575	1,190		2,385
	c	Other professional fees (attach schedule)				
	17	Interest	57			
	18	Taxes (attach schedule) (see page 14 of the instructions) STMT 3	38,593	2,426		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
23	Other expenses (att sch) STMT 4	98,673	98,466		15	
24	Total operating and administrative expenses. Add lines 13 through 23	140,898	102,082		2,400	
25	Contributions, gifts, grants paid	481,212			481,212	
26	Total expenses and disbursements. Add lines 24 and 25	622,110	102,082	0	483,612	
27	Subtract line 26 from line 12	530,829				
a	Excess of revenue over expenses and disbursements		1,035,020			
b	Net investment income (if negative, enter -0-)			0		
c	Adjusted net income (if negative, enter -0-)					

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Form **990-PF** (2007)

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7

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash—non-interest-bearing		5,206	6,584	6,584
	2	Savings and temporary cash investments		331,172	796,121	796,121
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (att. schedule) ▶				
		Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule) STMT 5		3,530,556	3,426,377	3,479,631
	b	Investments—corporate stock (attach schedule) SEE STMT 6		3,618,910	3,609,173	6,368,182
	c	Investments—corporate bonds (attach schedule) SEE STMT 7		1,475,527	1,183,470	1,298,160
	11	Investments—land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach sch.) ▶					
12	Investments—mortgage loans					
13	Investments—other (attach schedule) SEE STATEMENT 8		1,300,617	1,771,092	1,904,057	
14	Land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach sch.) ▶					
15	Other assets (describe ▶ )					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		10,261,988	10,792,817	13,852,735	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ )				
23	Total liabilities (add lines 17 through 22)		0	0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		10,261,988	10,792,817	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see page 17 of the instructions)		10,261,988	10,792,817	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)		10,261,988	10,792,817	

## Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	10,261,988
2	Enter amount from Part I, line 27a	2	530,829
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	10,792,817
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	10,792,817

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)

How acquired  
P—Purchase  
D—Donation(c) Date acquired  
(mo., day, yr.)(d) Date sold  
(mo., day, yr.)

<b>1a</b> PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
<b>b</b> CAPITAL GAIN DISTRIBUTIONS	P	VARIOUS	VARIOUS
<b>c</b> NET GAINS FROM PASS-THRU ENTITIES	P	VARIOUS	VARIOUS
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b> 5,865,755		5,457,574	408,181
<b>b</b> 82,320			82,320
<b>c</b> 105,017			105,017
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
<b>a</b>			408,181
<b>b</b>			82,320
<b>c</b>			105,017
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	<b>2</b>	595,518
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	<b>3</b>	595,518

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2006	257,660	12,911,029	0.019957
2005	523,813	9,928,167	0.052760
2004	403,999	6,350,761	0.063614
2003	102,243	3,818,443	0.026776
2002	157,845	3,261,749	0.048393

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.211500
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	0.042300
<b>4</b> Enter the net value of noncharitable-use assets for 2007 from Part X, line 5	<b>4</b>	13,620,804
<b>5</b> Multiply line 4 by line 3	<b>5</b>	576,160
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	10,350
<b>7</b> Add lines 5 and 6	<b>7</b>	586,510
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	483,612

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter (attach copy of ruling letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	20,700
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	20,700
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	20,700
6	Credits/Payments		
a	2007 estimated tax payments and 2006 overpayment credited to 2007	6a	27,683
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	5,000
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d. SEE STATEMENT 9 (12,142)	7	20,541
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	159
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2008 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ (2) On foundation managers <input type="checkbox"/> \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> PA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2007 or the taxable year beginning in 2007 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

**Part VII-A Statements Regarding Activities (continued)**

- 11a At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)
- b If "Yes," did the foundation have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and annuities described in the attachment for line 11a?
- 12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract?
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?
- Website address ► N/A

**AMENDED**

N/A

11a		X
11b		
12		X
13	X	

- 14 The books are in care of ► ROBERT L. NAUSE  
4718 GETTYSBURG ROAD SUITE 405  
Located at ► MECHANICSBURG, PA

Telephone no ► 717-972-1305

ZIP+4 ► 17055

- 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041— Check here  
and enter the amount of tax-exempt interest received or accrued during the year

► 15

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

- 1a During the year did the foundation (either directly or indirectly)
- (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No
- (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No
- (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No
- (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No
- (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No
- (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No
- b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐ **1b**
- c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2007? **1c**
- 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))
- a At the end of tax year 2007, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2007? ☐ Yes ☒ No  
If "Yes," list the years ► 20 , 20 , 20 , 20
- b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 22 of the instructions) **2b**
- c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  
► 20 , 20 , 20 , 20
- 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No
- b If "Yes," did it have excess business holdings in 2007 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2007) **3b**
- 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? **4a**
- b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2007? **4b**

	Yes	No
<b>1b</b>		X
<b>1c</b>		
<b>2b</b>		
<b>3b</b>		
<b>4a</b>		X
<b>4b</b>		X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ Yes ☒ No **5b**

Organizations relying on a current notice regarding disaster assistance check here ☐

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No **6a**

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No **6b**

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **7a**

If you answered "Yes" to 6b, also file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No **7b**

**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 23 of the instructions).**

(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 and deferred compensation	(e) Expense account, other allowances
ROCCO A. ORTENZIO 7 WESTWIND DR.	LEMOYNE PA 17043	TRUSTEE AS NEEDED	0	0
JOHN M. ORTENZIO 510 ORCHARD DR.	LEMOYNE PA 17043	TRUSTEE AS NEEDED	0	0
ROBERT A. ORTENZIO 1716 OLMSTEAD WAY E.	CAMP HILL PA 17011	TRUSTEE AS NEEDED	0	0
MARTIN J. ORTENZIO 12314 CLEGHORN RD.	COCKEYSVILLE MD 21030	TRUSTEE AS NEEDED	0	0

**2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions).**

If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions	
3	

Total. Add lines 1 through 3 ▶



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	13,404,903
b	Average of monthly cash balances	1b	423,324
c	Fair market value of all other assets (see page 25 of the instructions)	1c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	13,828,227
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	13,828,227
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	207,423
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,620,804
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	681,040

AMENDED

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	681,040
2a	Tax on investment income for 2007 from Part VI, line 5	2a	20,700
b	Income tax for 2007 (This does not include the tax from Part VI.)	2b	3,084
c	Add lines 2a and 2b	2c	23,784
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	657,256
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	657,256
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	657,256

**Part XII Qualifying Distributions** (see page 26 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	483,612
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	483,612
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	483,612

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2006	(c) 2006	(d) 2007
1 Distributable amount for 2007 from Part XI, line 7				657,256
2 Undistributed income, if any, as of the end of 2006				
a Enter amount for 2006 only			221,974	
b Total for prior years. 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2007				
a From 2002				
b From 2003				
c From 2004				
d From 2005				
e From 2006				
f Total of lines 3a through e				
4 Qualifying distributions for 2007 from Part XII, line 4 ▶ \$ 483,612			221,974	
a Applied to 2006, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 27 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 27 of the instructions)				
d Applied to 2007 distributable amount				261,638
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2007 (If an amount appears in column (d), the same amount must be shown in column (a) )				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions				
e Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f Undistributed income for 2007 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008				395,618
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2003				
b Excess from 2004				
c Excess from 2005				
d Excess from 2006				
e Excess from 2007				

b Check box to indicate whether the foundation is a private operating foundation described in section	4942(j)(3) or	4942(j)(5)
---	---------------	------------

**(4) Gross investment income**

[illegible]

SEE STATEMENT 11

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> Paid during the year SEE SCHEDULE	N/A	PUBLIC ORGANIZATIONS' EXEMPT	PURPOSES	481,212
<b>Total</b>			▶ <b>3a</b>	481,212
<b>b</b> Approved for future payment SEE STATEMENT 12				1,355,715
<b>Total</b>			▶ <b>3b</b>	1,355,715

AMENDED

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions on page 29 to verify calculations )

**1** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

**a** Transfers from the reporting foundation to a noncharitable exempt organization of

- (1) Cash
- (2) Other assets

**b** Other transactions

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

**c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees

**d** If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

☐ Yes ☒ No

**b If "Yes," complete the following schedule**

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Signature of officer or trustee \_\_\_\_\_ Date 7/16/10

► TRUSTEE  
Title

**Paid  
Preparer's  
Use Only**

Preparer's  
signature

Richard A. Gleif

Date \_\_\_\_\_

7/12/10

Check if  
self-employed ▶ ☐

Preparer's SSN or PTIN  
(See **Signature** on page 30  
of the instructions )  
P00486887

Firm's name (or yours if self-employed), address, and ZIP code

MARTIN M. SACKS & ASSOCIATES  
4775 LINGLESTOWN ROAD  
HARRISBURG, PA 17112

EIN ► 23-1979781  
Phone no 717-657-1300

Form **990-PF** (2007)

369 THE ROCCO AND NANCY ORTENZIO

23-6805409

**Federal Statements**

FYE: 12/31/2007

**AMENDED**

Form 990-PF - General Footnote

Description

AMENDED RETURN EXPLANATION:

A FORM 1099-OID IN THE AMOUNT OF \$7,948 WAS RECEIVED FROM SELECT MEDICAL HOLDINGS CORPORATION FOR 2007.

AMENDED

**Statement 1 - Form 990-PF, Part I, Line 11 - Other Income**

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
LOSS FROM PASS THRU ENTITIES			
	\$ -12,726	\$ -12,726	\$
UBTI FROM PASS THRU ENTITY			
	12,543		
TOTAL	\$ -183	\$ -12,726	\$ 0

**Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MARTIN M. SACKS & ASSOCIATES, CP	\$	\$	\$	\$
PREPARATION OF FORM 990-PF	3,575	1,190		2,385
TOTAL	\$ 3,575	\$ 1,190	\$ 0	\$ 2,385

**Statement 3 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAX ON NET INVESTMENT INC	\$ 30,500	\$	\$	\$
EXCISE TAX ON UNRELATED BUSINESS	5,667			
FOREIGN TAX WITHHELD ON DIVIDEND	2,426	2,426		
TOTAL	\$ 38,593	\$ 2,426	\$ 0	\$ 0

**Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
ASSET MGMT AND CUSTODY FEES	33,803	33,803		
TRANSACTION FEES	48	48		
MISCELLANEOUS	15			15
NON-DEDUCTIBLE EXPENSE	192			
DEDUCTIONS FROM INVESTMENT				
PASS-THRU ENTITIES	64,615	64,615		
TOTAL	\$ 98,673	\$ 98,466	\$ 0	\$ 15



## Federal Statements

AMENDED

**Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SEE ATTACHED SCHEDULE	\$ 3,530,556	\$ 3,426,377	MARKET	\$ 3,479,631
TOTAL	\$ 3,530,556	\$ 3,426,377		\$ 3,479,631

**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SEE ATTACHED SCHEDULE	\$ 3,618,910	\$ 3,609,173	MARKET	\$ 6,368,182
TOTAL	\$ 3,618,910	\$ 3,609,173		\$ 6,368,182

**Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SEE ATTACHED SCHEDULE	\$ 1,475,527	\$ 1,183,470	MARKET	\$ 1,298,160
TOTAL	\$ 1,475,527	\$ 1,183,470		\$ 1,298,160

**Statement 8 - Form 990-PF, Part II, Line 13 - Other Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
LIMITED PARTNERSHIP INTERESTS IN INVESTMENT PARTNERSHIPS:	\$	\$		\$
SELECT OPPORTUNITY PARTNERS, L.P.	51,298	56,981	MARKET	56,674
SELECT STRATEGY PARTNERS, L.P.	1,042,187	1,483,477	MARKET	1,569,840
SELECT GLOBAL PARTNERS, L.P.	207,132	230,634	MARKET	277,543
TOTAL	\$ 1,300,617	\$ 1,771,092		\$ 1,904,057

**Statement 9 - Form 990-PF, Part VI, Line 7 - Amended Return Payments**

Description	Amount
AMOUNT CREDITED TO 2008	\$ -12,142
TOTAL	\$ -12,142

AMENDED

**Statement 10 - Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000**Name of Manager

ROCCO A. ORTENZIO  
 JOHN M. ORTENZIO  
 ROBERT A. ORTENZIO  
 MARTIN J. ORTENZIO  
 TOTAL

**Statement 11 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**Description

GRANTS ARE PRIMARILY RESTRICTED TO ROMAN CATHOLIC EDUCATIONAL INSTITUTIONS, TO PROVIDE SCHOLARSHIPS OR OTHER ASSISTANCE TO QUALIFIED STUDENTS WITH FINANCIAL NEED, WITH FIRST PREFERENCE BEING GIVEN TO STUDENTS WHO ARE MEMBERS OF ST. ANN'S ROMAN CATHOLIC CHURCH, STEELTON, PENNSYLVANIA.

**Statement 12 - Form 990-PF, Part XV, Line 3b - Grants and Contributions Approved for Future Pmt**

<u>Name</u>	<u>Address</u>	<u>Address</u>	
<u>Relationship</u>	<u>Status</u>	<u>Purpose</u>	<u>Amount</u>
HOLY SPIRIT HOSPITAL	503 N. 21ST ST.	CAMP HILL PA 17011	
N/A	PUBLIC	CONSTRUCT HOSPITAL FACILITY	50,000
SAINT LAWRENCE FOUNDATION	212 STATE ST.	HARRISBURG PA 17101	
N/A	PUBLIC	PRESERVATION OF CHAPEL	20,000
BASILICA OF THE ASSUMPTIO	408 NORTH CHARLES ST.	BALTIMORE MD 21201	
N/A	PUBLIC	RESTORATION OF CATHEDRAL	150,000
HARRISBURG UNIVERSITY OF	304 MARKET ST.	HARRISBURG PA 17101	
N/A	PUBLIC	CONSTRUCT EDUCATIONAL FACILITY	1,135,715
TOTAL			<u>1,355,715</u>

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

**AMENDED**

PART II. LINE 10a. INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS - BEGINNING OF YEAR:

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>
<b>FIXED INCOME</b>					
<b>Government Bonds</b>					
3128X4N56	09/05/2006	150,000	Freddie Mac 02/24/2011 5.25% Call 02/24/2009, 1	99.80	149,701.50
3128X4VJ7	11/29/2005	100,000	Freddie Mac 06/01/2007 4.625	100.00	100,000.00
3128X5JJ8	08/30/2006	150,000	Freddie Mac 09/02/2011 5.45% Call 09/02/2008, 1	100.00	150,000.00
31331VTG1	04/17/2006	100,000	Federal Farm Credi 03/16/2009 5.08%	99.69	99,689.00
31331VYF7	05/12/2006	100,000	Fed Farm Credit 05/04/2009 5.25%	99.94	99,936.00
313396DW0	04/05/2006	250,000	Freddie Mac Disco 04/03/2007 5.127	95.10	237,757.36
313396FA6	05/02/2006	150,000	Freddie Mac Disco 05/01/2007 5.215	95.01	142,513.13
3133XDWB3	11/09/2005	100,000	Federal Home Loa 03/09/2007 4.735	100.00	100,000.00
3133XEGC7	01/12/2006	100,000	Federal Home Loa 02/08/2010 5.00% Call 02/08/2008, 1	100.00	100,000.00
3133XEU23	03/03/2006	100,000	Federal Home Loa 02/29/2008 5.00%	99.93	99,934.00
3133XEZP7	04/05/2006	150,000	Federal Home Loa 09/12/2008 5.00%	99.81	149,710.50
3133XFEP7	05/02/2006	300,000	Federal Home Loa 03/14/2008 5.125	99.85	299,550.00
3133XGKA1	08/08/2006	150,000	Federal Home Loa 08/18/2011 5.50% Call 02/18/2009, 1	100.00	150,000.00
3133XH5X6	09/21/2006	150,000	Federal Home Loa 09/29/2010 5.26% Call 09/29/2008, 1	100.00	150,000.00
3133XHFA5	12/13/2006	250,000	Federal Home Loa 10/16/2009 5.00% Call 10/16/2008, 1	100.00	250,000.00
3133XJ2D9	12/01/2006	150,000	Federal Home Loa 06/11/2010 5.13%	100.00	150,000.00
3133XJAK4	12/08/2006	150,000	Federal Home Loa 12/15/2010 5.00% Call 12/15/2008, 1	100.00	150,000.00
313588CF0	03/01/2006	265,000	FNMA Discount N 02/23/2007 4.95%	95.32	252,587.84
31359MH48	09/19/2006	150,000	Fannie Mae 02/22/2011 5.30% Call 02/22/2008, 1	99.47	149,206.50

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART II, LINE 10a, INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS -  
BEGINNING OF YEAR (CONTINUED):

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>
FIXED INCOME					
Government Bonds					
3136F76Z5	11/16/2006	200,000	Fannie Mae 06/04/2009 5.20% Call 12/04/2007, 1	100.00	200,000.00
3136F7PE1	11/29/2005	100,000	Fannie Mae 12/28/2007 4.875	99.97	99,970.00
3136F7S99	08/02/2006	150,000	Fannie Mae 08/26/2009 5.40% Call 08/26/2008, 1	100.00	150,000.00
3136F7ZW0	04/26/2006	100,000	Fannie Mae 05/12/2009 5.375 Call 05/12/2008, 1	100.00	100,000.00
					<u>3,530,555.83</u>

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

**AMENDED**

PART II, LINE 10a, INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS -  
END OF YEAR:

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>	<u>Current Price</u>	<u>Current Value</u>
<b>FIXED INCOME</b>							
<b>Government Bonds</b>							
3128XSPV4	02/26/2007	200,000	Freddie Mac 11/24/2010 5 1 Call 11/24/200	99.90	199,800.00	100.92	201,845.00
31331VYF7	05/12/2006	100,000	Fed Farm Credi 05/04/2009 5 2	99.94	99,936.00	101.94	101,937.50
313396SR5	02/07/2007	250,000	Freddie Mac D1 02/04/2008 5.2	95.00	237,505.97	99.62	249,050.00
3133XFEP7	05/02/2006	300,000	Federal Home 03/14/2008 5 1	99.85	299,550.00	100.09	300,281.25
3133XGKA1	08/08/2006	150,000	Federal Home 08/18/2011 5 5 Call 02/18/200	100.00	150,000.00	101.84	152,765.63
3133XH5X6	09/21/2006	150,000	Federal Home 09/29/2010 5.2 Call 09/29/200	100.00	150,000.00	100.84	151,265.63
3133XHFA5	12/13/2006	250,000	Federal Home 10/16/2009 5.0 Call 10/16/200	100.00	250,000.00	100.59	251,484.38
3133XJAK4	12/08/2006	150,000	Federal Home 12/15/2010 5.0 Call 12/15/200	100.00	150,000.00	100.88	151,312.50
3133XK2N4	08/24/2007	250,000	Federal Home 03/06/2012 5.3 Call 03/06/200	100.00	250,000.00	101.75	254,375.00
3133XKQS7	05/02/2007	150,000	Federal Home 05/07/2012 5.0 Call 05/07/201	100.00	150,000.00	103.31	154,968.75
313588SN6	02/26/2007	200,000	FNMA Discoun 02/01/2008 5.2	95.34	190,677.50	99.66	199,320.00
31359MH48	09/19/2006	150,000	Fannie Mae 02/22/2011 5 3 Call 02/22/200	99.47	149,206.50	100.03	150,046.88
3136F7S99	08/02/2006	150,000	Fannie Mae 08/26/2009 5 4 Call 08/26/200	100.00	150,000.00	100.94	151,406.25
3136F7ZW0	04/26/2006	100,000	Fannie Mae 05/12/2009 5 3 Call 05/12/200	100.00	100,000.00	100.53	100,531.25
3136F8VW2	10/26/2007	350,000	Fannie Mae 11/05/2012 5 0 Call 11/05/200	100.00	350,000.00	100.84	352,953.13
3136F8YV1	12/11/2007	100,000	Fannie Mae 06/19/2013 5.0 Call 12/19/200	100.00	100,000.00	100.50	100,500.00

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART II. LINE 10a. INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS -  
END OF YEAR (CONTINUED):

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>	<u>Current Price</u>	<u>Current Value</u>
3128X4N56	09/05/2006	300,000	Freddie Mac 02/24/2011 5 2 Call 02/24/200	99 90	299,701 50	101 35	304,035 60
3128X5JJ8	08/30/2006	150,000	Freddie Mac 09/02/2011 5 4 Call 09/02/200	100 00	150,000.00	101 03	151,552 35
					<u>3,426,377 47</u>		<u>3,479,631 10</u>

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

**AMENDED**

PART II, LINE 10b, INVESTMENTS - CORPORATE STOCK - BEGINNING OF YEAR:

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>
<b>EQUITIES</b>					
<b>Preferred Stock</b>					
EGLPREF	02/05/1997	57,352.74	Select Medical Hol	0.00	0.00
<b>Large Cap</b>					
48123JAN9	06/16/2006	750	S&P 500 Structure	100.00	75,000.00
AMGN	10/23/2006	440	Amgen, Inc.	73.44	32,313.60
AXP	09/23/2005	1,000	American Express	49.47	49,466.50
BA	03/23/2006	600	Boeing Co.	77.85	46,710.00
BAC	10/20/1995	2,142	Bank of America	21.38	45,791.40
BNAAX	12/23/2005	11,969.659	UBS Dynamic Alp	10.86	130,000.00
BUD	10/30/2000	2,117	Anheuser Busch C	46.26	97,928.81
C	02/08/1996	2,454	Citigroup	20.78	50,998.37
CL	10/17/2001	500	Colgate-Palmolive	56.75	28,373.00
CSCO	05/05/1997	2,500	Cisco Systems Inc	6.58	16,458.34
D	12/29/2000	594	Dominion Resourc	66.94	39,759.39
DD	10/23/2006	530	Du Pont E I De Ne	44.96	23,828.80
FO	03/23/2006	500	Fortune Brands, In	82.04	41,022.00
GE	02/06/1991	3,894	General Electric C	8.98	34,981.72
GILD	03/23/2006	800	Gilead Sciences In	61.91	49,528.00
HPQ	03/23/2006	1,300	Hewlett-Packard C	33.21	43,173.00
HSGFX	03/24/2005	7,263.248	Hussman Strategic	15.83	115,000.00
IBM	06/15/1992	1,240	International Busin	23.74	29,434.87
INTC	10/23/2006	2,100	Intel Corp.	21.39	44,919.00
IR	06/05/2003	1,211	Ingersoll Rand Co	22.12	26,782.44
JCI	03/30/2004	676	Johnson Controls	59.30	40,086.80
JNJ	03/03/1994	1,951	Johnson & Johnso	15.81	30,851.48
LOW	11/21/2001	1,490	Lowe's Cos Inc.	20.57	30,649.30
MER	10/23/1995	612	Merrill Lynch & C	14.26	8,728.65
MRO	03/23/2006	310	Marathon Oil Corp	77.60	24,056.00
MS	12/02/2002	910	Morgan Stanley	50.99	46,397.19
MSFT	10/20/1995	4,133	Microsoft Corp	7.10	29,345.10
PASDX	01/06/2006	5,600.783	Pimco All Asset -	12.77	71,499.64
PEP	04/27/1993	2,050	Pepsico Inc	40.53	83,087.48
PG	05/08/1997	2,529	Procter & Gamble	32.78	82,894.09
TIBIX	09/27/2005	4,544.769	Thornburg Investm	18.70	85,000.00
TXN	01/31/1996	1,805	Texas Instruments	5.76	10,390.03
UPS	10/23/2006	650	United Parcel Servi	76.09	49,458.50
UTX	06/10/2002	795	United Technologi	34.50	27,431.04
WFC	10/23/1995	1,200	Wells Fargo & Co.	12.16	14,595.15
WMT	02/22/1996	1,524	Wal Mart Stores In	13.92	21,221.60
XLE	09/15/2006	750	Energy Select Sect	51.88	38,913.45
XLK	11/21/2006	1,690	Amex Technology	23.76	40,154.40
XOM	06/15/1992	2,403	Exxon Mobil Corp	20.20	48,531.95
					<b>1,804,761.09</b>

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

**AMENDED**

PART II. LINE 10b. INVESTMENTS - CORPORATE STOCK - BEGINNING OF YEAR  
(CONTINUED):

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>
<b>EQUITIES</b>					
<b>Mid Cap</b>					
EMAAX	04/19/2006	4,505.994	Enterprise Mergers	12.21	55,000.00
ESV	03/23/2006	1,000	Ensco International	48.55	48,550.00
FPACX	03/24/2005	3,845.333	FPA Crescent Fun	24.74	95,130.57
JWN	10/23/2006	1,660	Nordstrom Inc	47.19	78,332.74
LRCX	03/23/2006	800	Lam Research Cor	42.71	34,168.00
MCO	10/23/2006	960	Moody's Corporati	65.10	62,496.96
NFJ	07/10/2006	2,000	NFJ Div, Int, Prem	22.70	45,399.60
PX	10/23/2006	350	Praxair, INC	59.53	20,835.50
SAY	03/23/2006	1,600	Satyam Computer	21.03	33,640.00
					<u>473,553.37</u>
<b>Small Cap</b>					
BWC	07/20/2006	3,270	Blackrock World I	15.27	49,946.96
EGLEQ	02/05/1997	385,697	Select Medical Hol	0.07	28,590.51
GDV	08/07/2006	2,000	Gabelli Dividend	19.06	38,120.00
KYN	07/10/2006	2,000	Kayne Anderson M	25.20	50,403.24
MHS	10/23/2006	790	Medco Health Solu	57.30	45,267.00
TAVFX	10/06/2005	830.868	Third Avenue Valu	60.18	50,000.00
					<u>262,327.71</u>
<b>International</b>					
JBIX	08/03/2004	933.881	Julius Baer Internat	26.77	25,000.00
CAQ	05/05/2006	1,200	CGM Asian Curren	10.07	12,083.59
CZJ	05/05/2006	1,200	CF Asian Currency	10.32	12,380.81
EACFX	03/26/2004	22,866.725	Evergreen Asset Al	12.65	289,295.61
GSK	10/23/2006	790	Glaxo Smithkline	56.17	44,374.30
ICPHX	09/28/2006	10,752.688	Franklin Templeto	9.30	100,000.00
SGENX	09/30/2004	8,060.132	First Eagle Global	36.34	292,867.44
SLB	09/23/2005	1,190	Schlumberger Ltd	42.24	50,265.60
TAVIX	08/03/2004	1,597.444	Third Avenue Inter	15.65	25,000.00
					<u>851,267.35</u>
<b>Real Estate</b>					
IRFCX	09/20/2006	13,766.082	Cohen & Steers Int	16.49	227,000.00
					<u><u>3,618,909.52</u></u>



THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

**AMENDED**

PART II, LINE 10b, INVESTMENTS - CORPORATE STOCK - END OF YEAR:

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>	<u>Current Price</u>	<u>Current Value</u>
<b>EQUITIES</b>							
<b>Preferred Stock</b>							
EGLPREF	02/05/1997	57,352.74	Select Medical	0.00	0.00	19.81	1,136,353.86
<b>Large Cap</b>							
48123JSH3	03/02/2007	1,500	S&P 500 Struct	100.00	150,000.00	105.18	157,773.00
48123JT33	07/26/2007	1,250	S&P 500 Struct	100.00	125,000.00	101.15	126,433.75
48123MAH5	09/27/2007	750	S&P 500 Struct	100.00	75,000.00	98.27	73,699.50
ABB	06/22/2007	1,190	ABB Ltd	22.39	26,643.98	28.80	34,272.00
APD	06/22/2007	300	Air Products &	82.23	24,669.00	98.63	29,589.00
BA	03/23/2006	600	Boeing Co	77.85	46,710.00	87.46	52,476.00
BAX	02/09/2007	900	Baxter Internati	49.90	44,910.00	58.05	52,245.00
BUD	10/30/2000	2,117	Anheuser Busc	46.26	97,928.81	52.34	110,803.78
C	02/08/1996	1,488	Citigroup	10.16	15,122.69	29.44	43,806.72
CL	10/17/2001	500	Colgate-Palmol	56.75	28,373.00	77.96	38,980.00
CSCO	05/05/1997	2,120	Cisco Systems I	6.58	13,956.67	27.07	57,388.19
CVS	06/22/2007	1,110	CVS	36.65	40,679.95	39.75	44,122.50
DD	10/23/2006	530	Du Pont E I De	44.96	23,828.80	44.09	23,367.70
DIA	08/20/2007	385	Dow Diamonds	131.00	50,435.00	132.55	51,031.75
DIS	02/09/2007	1,110	Walt Disney (H	34.79	38,611.76	32.28	35,830.80
EMC	06/22/2007	2,890	EMC Corp	17.96	51,904.40	18.53	53,551.70
EMR	02/09/2007	1,020	Emerson Electri	44.67	45,563.40	56.66	57,793.20
EPSYX	07/19/2007	5,521.619	Epoch Global E	19.38	106,992.25	17.75	98,008.74
FO	03/23/2006	500	Fortune Brands,	82.04	41,022.00	72.36	36,180.00
GD	02/09/2007	600	General Dynam	79.20	47,520.00	88.99	53,394.00
GE	02/06/1991	3,630	General Electri	8.71	31,630.02	37.07	134,564.10
GILD	03/23/2006	1,600	Gilead Sciences	30.96	49,528.00	46.01	73,616.00
HPQ	03/23/2006	1,300	Hewlett-Packar	33.21	43,173.00	50.48	65,624.00
HSGFX	03/24/2005	7,263.248	Hussman Strate	15.83	115,000.00	15.57	113,088.77
IBM	06/15/1992	1,140	International B	23.72	27,042.99	108.10	123,234.00
INTC	10/23/2006	2,100	Intel Corp	21.39	44,919.00	26.66	55,986.00
IR	06/05/2003	1,030	Ingersoll Rand	22.12	22,779.45	46.47	47,864.10
JCI	03/30/2004	1,710	Johnson Contro	19.77	33,801.00	36.04	61,628.40
JNJ	03/03/1994	1,041	Johnson & John	10.11	10,527.61	66.70	69,434.70
MCD	06/22/2007	850	McDonald's Co	50.38	42,825.98	58.91	50,073.50
MRO	03/23/2006	620	Marathon Oil C	38.80	24,056.00	60.86	37,733.20
MS	12/02/2002	910	Morgan Stanley	42.58	38,745.55	53.11	48,330.10
MSFT	04/10/1996	2,640	Microsoft Corp	7.74	20,433.75	35.60	93,984.00
NTRS	06/22/2007	680	Northern Trust	64.42	43,805.53	76.58	52,074.40
PEP	04/27/1993	2,050	Pepsico Inc	40.53	83,087.48	75.90	155,595.00
PG	05/08/1997	1,640	Procter & Gam	31.54	51,728.68	73.42	120,408.80
TIBIX	09/27/2005	4,544.769	Thornburg Inve	18.70	85,000.00	22.82	103,711.63
TXN	01/31/1996	1,530	Texas Instrume	5.76	8,807.06	33.40	51,102.00
UTX	06/10/2002	795	United Technol	34.50	27,431.04	76.54	60,849.30
WMT	02/22/1996	1,024	Wal Mart Store	11.11	11,380.97	47.53	48,670.72
XLE	09/15/2006	750	Energy Select S	51.88	38,913.45	79.35	59,512.50
XLK	11/21/2006	1,690	Amex Technolo	23.76	40,154.40	26.66	45,055.40
XOM	06/15/1992	1,624	Exxon Mobil C	17.75	28,827.61	93.69	152,152.56
						2,018,470.28	3,055,040.51

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

**AMENDED**

PART II, LINE 10b, INVESTMENTS - CORPORATE STOCK - END OF YEAR (CONTINUED):

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>	<u>Current Price</u>	<u>Current Value</u>
<b>EQUITIES</b>							
<b>Mid Cap</b>							
SYK	06/22/2007	570	Stryker Corp	63.32	36,092.40	74.72	42,590.40
ESV	03/23/2006	760	Ensco Internati	48.55	36,898.00	59.62	45,311.20
FPACX	03/24/2005	3,845.333	FPA Crescent F	24.74	95,130.57	25.29	97,248.47
PX	10/23/2006	350	Praxair, INC	59.53	20,835.50	88.71	31,048.50
SAY	03/23/2006	1,600	Satyam Comput	21.03	33,640.00	26.72	42,752.00
					<u>222,596.47</u>		<u>258,950.57</u>
<b>Small Cap</b>							
EGLEQ	02/05/1997	385,697	Select Medical	0.07	28,590.51	1.00	385,697.00
MHS	10/23/2006	790	Medco Health	57.30	45,267.00	101.40	80,106.00
NWSA	02/09/2007	1,800	News Corp Inc	23.99	43,182.00	20.49	36,882.00
TAVFX	10/06/2005	830.868	Third Avenue	60.18	50,000.00	60.76	50,483.54
					<u>167,039.51</u>		<u>553,168.54</u>
<b>International</b>							
06738C6U8	06/01/2007	2,500	DJ Euro Stoxx	100.00	250,000.00	93.46	233,650.00
BJBIX	08/03/2004	1,929.897	Julius Baer Inte	38.86	75,000.00	43.64	84,220.71
EACFX	03/26/2004	22,866.725	Evergreen Asse	12.65	289,295.61	14.50	331,567.51
EFA	02/20/2007	460	MSCI EAFE In	76.23	35,065.43	78.50	36,110.00
EWG	09/07/2007	1,555	iShares MSCI	31.90	49,597.97	35.44	55,109.20
SGENX	09/30/2004	8,060.132	First Eagle Glo	36.34	292,867.44	44.90	361,899.93
SLB	09/23/2005	1,010	Schlumberger L	42.24	42,662.40	98.37	99,353.70
TAVIX	08/03/2004	4,131.557	Third Avenue I	21.78	90,000.00	18.74	77,425.38
TEVA	06/22/2007	1,270	Teva Pharmace	40.58	51,536.60	46.48	59,029.60
					<u>1,176,025.45</u>		<u>1,338,366.03</u>
<b>Emerging Markets</b>							
EEM	11/21/2007	175	I Shares MSCI	143.09	25,041.24	150.30	26,302.50
					<u>3,609,172.95</u>		<u>6,368,182.01</u>

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART II, LINE 10c, INVESTMENTS - CORPORATE BONDS - BEGINNING OF YEAR:

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>
<b>FIXED INCOME</b>					
<b>Certificate of Deposit</b>					
17284PKF1	05/30/2006	99,000	CIT Bank CD 06/08/2009 5.30%	100.00	99,000.00
86604WBC1	07/20/2006	100,000	Summit Communit 01/26/2009 5.50%	100.00	100,000.00
					<u>199,000.00</u>
<b>Corporate Bonds</b>					
61745ESL	01/06/2004	50,000	Morgan Stanley C 02/02/2011 3 85%	100.00	50,000.00
78442FBD	09/09/2003	50,000	SLMA Corp / CPI- 10/01/2010 4.15%	100.00	50,000.00
EGLHY	02/24/2005	1,000,000	Select Medical Hol 02/24/2015 10.00 Call 02/24/2010, 0.	87.86	878,575.37
					<u>978,575.37</u>
<b>Commercial Paper</b>					
36959JNN9	12/05/2006	300,000	GE Commercial Pa 01/22/2007 5.339	99.32	297,951.58
					<u><u>1,475,526.95</u></u>

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART II. LINE 10c. INVESTMENTS - CORPORATE BONDS - END OF YEAR:

<u>Symbol</u>	<u>Trade Date</u>	<u>Quantity</u>	<u>Description</u>	<u>Unit Cost</u>	<u>Cost Basis</u>	<u>Current Price</u>	<u>Current Value</u>
<b>FIXED INCOME</b>							
<b>Certificate of Deposit</b>							
17284PKF1	05/30/2006	99,000	CIT Bank CD 06/08/2009 5.3	100 00	99,000 00	100 41	99,402.24
86604WBC1	07/20/2006	100,000	Summit Comm 01/26/2009 5 5	100 00	100,000 00	100 47	100,468 80
					199,000 00		199,871 04
<b>Corporate Bonds</b>							
EGLHY	02/24/2005	1,000,000	Select Medical 02/24/2015 10 Call 02/24/201	88.65	886,522.95	100 00	1,000,000 00
<b>Commercial Paper</b>							
36959HE29	11/16/2007	100,000	GE Commercial 05/02/2008 4 6	97 95	97,946 67	98.29	98,289 00
					1,183,469.62		1,298,160.04

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART XV, LINE 3a, CONTRIBUTIONS PAID:

3/16/07	Cathedral Parish of Saint Patrick - Lenten Appeal 212 State Street Harrisburg, PA 17101	\$ 1,000
3/31/07	PA Coalition Against Rape 125 North Enola Drive Enola, PA 17025 (717) 728-9740 Tel	\$ 1,000
5/11/07	WITF, Inc. 4801 Lindle Road Harrisburg, PA 17111 (717) 704-5000 Tel (717) 704-3659 Fax	\$ 6,760
5/11/07	Diocese of Harrisburg 4800 Union Deposit Road Harrisburg, PA 17105 (717) 657-4804 Tel	\$ 10,000
6/7/07	Trinity High School 3601 Simpson Ferry Road Camp Hill, PA 17011 (717) 761-2228 Tel (717) 761-7309 Fax	\$ 10,000
6/22/07	University of Pennsylvania 433 Franklin Building Philadelphia, PA 19104 (215) 898-2672 Tel	\$ 10,000
6/22/07	Bishop McDevitt High School 2200 Market Street Harrisburg, PA 17103 (717) 236-7973 Tel (717) 234-1270	\$ 25,000
7/11/07	Access York P.O. Box 743 York, PA 17405	\$ 6,667
8/23/07	Kevin J. Traynor, Sr. Family Foundation 235 Home Place Exton, PA 19341 (610) 363-1281 Tel	\$ 500

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART XV, LINE 3a. CONTRIBUTIONS PAID (CONTINUED):

9/14/07	Holy Spirit Hospital Auxiliary 503 North 21 <sup>st</sup> Street Camp Hill, PA 17011 (717) 763-2796	\$ 7,500
10/1/07	Foundation for the Preservation of Historic Saint Lawrence Chapel, Inc. 212 State Street Harrisburg, PA 17101 (717) 232-2169	\$ 25,000
10/1/07	CURE International 701 Bosler Avenue Lemoyne, PA 17043 (717) 730-6706 Tel (717) 730-6747 Fax	\$ 15,000
10/1/07	West Chester University Foundation 628 South High Street West Chester, PA 19383 (610) 436-2868 Tel (610) 436-2606	\$ 15,000
10/1/07	University of Notre Dame 400 Mail Building Notre Dame, IN 46556 (574) 631-5150 Tel	\$ 10,000
10/12/07	United Way of Capital Region 2235 Millennium Way Enola, PA 17025 (717) 732-0700 Tel (717) 732-5200 Fax	\$ 10,000
10/12/07	Pennsylvania State University One Old Main University Park, PA 16802 (877) 888-5646 Tel	\$ 10,000
10/12/07	Susquehanna University 514 University Avenue Selinsgrove, PA 17870 (800) 353-7970 Tel (570) 372-2710 Fax	\$ 10,000
10/12/07	St. Patrick's Cathedral School 212 State Street Harrisburg, PA 17101	\$ 10,000

THE ORTENZIO FAMILY FOUNDATION

23-6805409

FORM 990-PF - 2007

AMENDED

PART XV, LINE 3a, CONTRIBUTIONS PAID (CONTINUED):

10/12/07	Cathedral Parish of St. Patrick 212 State Street Harrisburg, PA 17101	\$ 10,000
11/7/07	YWCA of Greater Harrisburg 1101 Market Street Harrisburg, PA 17103 (717) 234-7931 Tel	\$ 1,000
12/6/07	Basilica of the Assumption Historic Trust, Inc. 408 North Charles Street Baltimore, MD 21201 (410) 727-3565 Tel (410) 539-0407 Fax	\$ 40,000
12/6/07	Holy Spirit Hospital 503 North 21 <sup>st</sup> Street Camp Hill, PA 17011 (717) 763-2100	\$ 50,000
12/6/07	Harrisburg University 304 Market Street Harrisburg, PA 17101 (717) 901-5100 Tel (717) 901-5150 Fax	\$189,285
12/12/07	Nativity School of Harrisburg 1453 Zarker Street Harrisburg, PA 17104	\$ 2,500
12/12/07	Habitat for Humanity of the Greater Harrisburg Area 900 South Arlington Avenue Suite 235 Harrisburg, PA 17109	\$ 2,500
12/12/07	Johns Hopkins University 100 North Charles Street Suite 234 Baltimore, MD 21201 (410) 516-4203 Tel (410) 230-4262 Fax	\$ 2,500

Total Donations - 2007

\$481,212

Form **8868**

(Rev. April 2007)

Department of the Treasury  
Internal Revenue ServiceApplication for Extension of Time To  
Exempt Organization Return

▶ File a separate application for each return

OMB No 1545-1709

- ▶ ☒ If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box
- ▶ ☐ If you are filing for an Additional (not automatic) 3-Month Extension, complete only Part II (on page 2 of this form)
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed)

Section 501(c) corporations required to file Form 990-T and requesting an automatic 6-month extension-check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for section 501(c) corporations required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits

<b>Type or print</b>	Name of Exempt Organization	Employer identification number
File by the due date for filing your return. See instructions	THE ORTENZIO FAMILY FOUNDATION	23-6805409
	Number, street, and room or suite no. If a P.O. box, see instructions	
	4718 OLD GETTYSBURG ROAD - SUITE 405	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	MECHANICSBURG PA 17055	

**Check type of return to be filed** (file a separate application for each return)

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

- The books are in the care of ▶ ROBERT L. NAUSE

Telephone No ▶ 717-972-1305

FAX No ▶

- If the organization does not have an office or place of business in the United States, check this box

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6 months for a section 501(c) corporation required to file Form 990-T) extension of time until 8/15/08, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ▶ ☒ calendar year 2007 or
- ▶ ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	32,683
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	27,683
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	5,000

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see Instructions

Form **8868** (Rev. 4-2007)



• If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

• If you are filing for an Automatic 3-Month Extension, complete only Part I (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** You must file original and one copy

Type or print	Name of Exempt Organization	Employer identification number
File by the extended due date for filing the return. See instructions	THE ORTENZIO FAMILY FOUNDATION	23-6805409
	Number, street, and room or suite no. If a P.O. box, see instructions 4718 OLD GETTYSBURG ROAD - SUITE 405	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. MECHANICSBURG PA 17055	

Check type of return to be filed (File a separate application for each return):

- |                                      |   |                                      |                                    |
|--------------------------------------|---|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990    | <input checked="" type="checkbox"/> Form 990-PF                   | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 4720   | <input type="checkbox"/> Form 8870 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 5227   |                                    |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

• The books are in the care of **▶ ROBERT L. NAUSE**

Telephone No **▶ 717-972-1305**

FAX No. **▶**

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) **\_\_\_\_\_**

If this is

for the whole group, check this box ☐

. If it is for part of the group, check this box ☐

and attach a

list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **11/17/08**.

5 For calendar year **2007**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

**ADDITIONAL TIME IS REQUESTED TO GATHER INFORMATION TO PREPARE A COMPLETE AND ACCURATE RETURN.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	21,393
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	32,683
c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **▶ Richard A. Bluff**

Title **▶ CPA**

Date **▶ 8/12/08**

Form **8868** (Rev. 4-2008)