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Form 990-PF

Department of the Treasury  
Internal Revenue ServiceReturn of Private Foundation  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

OMB No 1545-0052

2008

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

For calendar year 2008, or tax year beginning

, and ending

G Check all that apply: ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>THE EDWARD J. DEBARTOLO MEMORIAL SCHOLARSHIP FOUNDATION</b>		A Employer identification number <b>31-1527910</b>
	Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>7620 MARKET STREET</b>		B Telephone number <b>330-965-2000</b>
	City or town, state, and ZIP code <b>YOUNGSTOWN, OH 44512</b>		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>728,439.</b>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
		(Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	140,400.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	961.	961.		STATEMENT 1
4	Dividends and interest from securities	19,391.	19,391.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	10,346.			
b	Gross sales price for all assets on line 6a	146,022.			
7	Capital gain net income (from Part IV, line 2)		10,346.		
8	Net short-term capital gains				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less cost of goods sold				
c	Gross profit or (loss)				
11	Other income	103,821.	0.		STATEMENT 3
12	Total. Add lines 1 through 11	274,919.	30,698.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees				
c	Other professional fees				
17	Interest				
18	Taxes STMT 4	2,853.	0.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 5	93,814.	0.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	96,667.	0.		0.
25	Contributions, gifts, grants paid	48,000.			48,000.
26	Total expenses and disbursements. Add lines 24 and 25	144,667.	0.		48,000.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	130,252.			
b	Net investment income (if negative, enter -0-)		30,698.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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

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SCANNED MAR 03 2010

Revenue

Operating and Administrative Expenses

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<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	53,539.	145,188.	145,188.
	2 Savings and temporary cash investments			
	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			
	7 Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges		423.	423.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock <b>STMT 6</b>	809,654.	844,597.	525,413.
	c Investments - corporate bonds <b>STMT 7</b>	56,730.	59,967.	57,415.
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
14 Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
<b>16 Total assets (to be completed by all filers)</b>	<b>919,923.</b>	<b>1,050,175.</b>	<b>728,439.</b>	
<b>Liabilities</b>	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			
	22 Other liabilities (describe ▶)			
<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	919,923.	1,050,175.	
<b>30 Total net assets or fund balances</b>	<b>919,923.</b>	<b>1,050,175.</b>		
<b>31 Total liabilities and net assets/fund balances</b>	<b>919,923.</b>	<b>1,050,175.</b>		

**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	919,923.
2 Enter amount from Part I, line 27a	2	130,252.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,050,175.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,050,175.

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**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.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENTS			
c			
d			
e			

(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)
a			
b			
c			
d			
e 146,022.		135,676.	10,346.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			10,346.

2 Capital gain net income or (net capital loss)	2	10,346.
3 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). If (loss), enter -0- in Part I, line 8	3	N/A

**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 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))
2007	40,000.	909,590.	.043976
2006	40,000.	721,574.	.055434
2005	30,000.	550,072.	.054538
2004	30,000.	466,802.	.064267
2003	30,000.	429,425.	.069861

2 Total of line 1, column (d)	2	.288076
3 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	3	.057615
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	856,386.
5 Multiply line 4 by line 3	5	49,341.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	307.
7 Add lines 5 and 6	7	49,648.
8 Enter qualifying distributions from Part XII, line 4	8	48,000.

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.

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**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see 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	614.
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	614.
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	614.
6 Credits/Payments:			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a	1,840.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,840.	
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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,226.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax	11	0.	

**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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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
1c 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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
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?		
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 instructions) <u>OH</u>		
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 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? 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

N/A

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

11	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 instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	

14 The books are in care of ► **THE DEBARTOLO CORPORATION** Telephone no. ► **330-965-2000**  
 Located at ► **7620 MARKET ST., YOUNGSTOWN, OH** ZIP+4 ► **44512**

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 N/A

**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.

	Yes	No
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/> N/A	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 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1c	X
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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
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 instructions.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2008 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 2008.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2008?	4b	X

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**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))?   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?                   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| (3) Provide a grant to an individual for travel, study, or other similar purposes?  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?                | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 instructions)?

N/A

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?

N/A

☐ Yes ☐ No

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?

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?

N/A

**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.

(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
MARIE DENISE DEBARTOLO YORK 7620 MARKET ST. YOUNGSTOWN, OH 44512	TRUSTEE 1.00	0.	0.	0.
JOHN C. YORK II 7620 MARKET ST. YOUNGSTOWN, OH 44512	TRUSTEE 1.00	0.	0.	0.
JOHN EDWARD YORK 7620 MARKET ST. YOUNGSTOWN, OH 44512	TRUSTEE 1.00	0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1). 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

0

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THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION**Part VIII****Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. 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

0

**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

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 instructions.		
3		
Total. Add lines 1 through 3		0.

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see 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	832,052.
b	Average of monthly cash balances	1b	37,375.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	869,427.
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	869,427.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	13,041.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	856,386.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	42,819.

**Part XI Distributable Amount** (see 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	42,819.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	614.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	614.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	42,205.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	42,205.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	42,205.

**Part XII Qualifying Distributions** (see 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	48,000.
b	Program-related investments - total from Part IX-B	1b	0.
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	48,000.
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	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	48,000.

**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 instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				42,205.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003				
b From 2004	7,009.			
c From 2005	3,072.			
d From 2006	4,909.			
e From 2007				
f Total of lines 3a through e	14,990.			
4 Qualifying distributions for 2008 from Part XII, line 4: ► \$ 48,000.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				42,205.
e Remaining amount distributed out of corpus	5,795.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	20,785.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	20,785.			
10 Analysis of line 9:				
a Excess from 2004	7,009.			
b Excess from 2005	3,072.			
c Excess from 2006	4,909.			
d Excess from 2007				
e Excess from 2008	5,795.			

**THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION**

Form 990-PF (2008)

31-1527910 Page 10

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

COPY

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)

**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2) )

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

**SEE STATEMENT 8**

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION**Part XV** Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT 9				
Total			▶ 3a	48,000.
b Approved for future payment				
NONE				
Total			▶ 3b	0.





**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No 1545-0047

**2008**

Name of the organization

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION

Employer identification number

31-1527910

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**. (Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.)

**General Rule**

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$

**Caution.** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions  
for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

## Name of organization

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION

## Employer identification number

31-1527910

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	BRUCE ZOLDAN 555 MARTIN LUTHER KING JR. BLVD. YOUNGSTOWN, OH 44502	\$ 13,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	DAVE HANDEL 721 BOARDMAN-POLAND R. YOUNGSTOWN, OH 44512	\$ 26,350.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	ED AND CHRISTINE MURANSKY 100 DEBARTOLO PLACE # 301 YOUNGSTOWN, OH 44512	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
4	EDWARD J. DEBARTOLO JR 15436 N. FLORIDA AVE., SUITE 200 TAMPA, FL 33613	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
5	GALLAGHER PIPINO, INC. 7600 MARKET ST. YOUNGSTOWN, OH 44512	\$ 7,850.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
6	GREG SMITH 400 W. RAILROAD STREET COLUMBIANA, OH 44408	\$ 5,700.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



## Name of organization

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION

## Employer identification number

31-1527910

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
7	MARIE DENISE DEBARTOLO YORK 7620 MARKET STREET YOUNGSTOWN, OH 44512	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
8	TRAVAGLINI ENTERTAINMENT DARLINGTON RD. NE WARREN, OH 44484	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
9	ED REESE 89 HEATHER CREEK RUN YOUNGSTOWN, OH 44511	\$ 5,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
10	JIM PASTORE 11988 STATE RT. 45 LISBON, OH 44432	\$ 5,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
11	GWEN GELETKA 5881 ROSEWOOD DRIVE BOARDMAN, OH 44512	\$ 5,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
12	BTI 12875 CORPORATE DRIVE SUITE A PARMA, OH 44130	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

## Name of organization

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION

## Employer identification number

31-1527910

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
13	FRANK AMBROSIA 2145 REDWOOD PLACE CANFIELD, OH 44406	\$ 5,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION

CONTINUATION FOR 990-PF, PART IV  
31-1527910 PAGE 1 OF 2

**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.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	986.823 SHARES OF ALLEGIANT INTL EQUITY FD	P	VARIOUS	01/09/08
b	282.379 SHARES OF ALLEGIANT LG. CAP GROWTH	P	VARIOUS	01/09/08
c	1761.833 SHARES OF ALLEGIANT LG. CAP GROWTH	P	VARIOUS	06/19/08
d	58.631 SHARES OF ALLEGIANT LG. CAP VALUE	P	VARIOUS	01/09/08
e	63.059 SHARES OF ALLEGIANT LG. CAP VALUE	P	VARIOUS	06/19/08
f	3900.975 SHARES OF ALLEGIANT INTERIM BOND FUND	P	VARIOUS	06/19/08
g	241.171 SHARES OF TEMPLETON INSTL FDS EMERGING MK	P	05/07/07	01/09/08
h	309.33 SHARES OF ALLEGIANT LG. CAP GROWTH	P	VARIOUS	06/19/08
i	78 SHARES OF ISHARES TR RUSSELL 2000	P	05/09/07	01/09/08
j	5.941 SHARES OF HARBOR INTERNATIONAL	P	01/09/08	06/19/08
k	9.25 SHARES OF MASTERS SELECT INTERNATIONAL	P	01/09/08	06/19/08
l	69.612 SHARES OF T. ROWE PRICE EMERGING MARKETS	P	01/09/08	06/19/08
m	32.543 SHARES OF T. ROWE PRICE EMERGING MARKETS	P	01/09/08	10/20/08
n	108.519 SHARES OF T. ROWE PRICE EMERGING MARKETS	P	01/09/08	12/18/08
o	36.713 SHARES OF ALLEGIANT MID CAP VALUE	P	01/09/08	06/19/08

(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)
a 17,230.		9,409.	7,821.
b 5,312.		5,755.	<443.>
c 31,678.		33,056.	<1,378.>
d 983.		1,169.	<186.>
e 999.		1,232.	<233.>
f 41,584.		41,763.	<179.>
g 5,016.		5,325.	<309.>
h 5,562.		6,192.	<630.>
i 5,456.		6,434.	<978.>
j 404.		412.	<8.>
k 152.		167.	<15.>
l 2,702.		2,974.	<272.>
m 621.		1,390.	<769.>
n 1,775.		4,636.	<2,861.>
o 474.		474.	0.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			7,821.
b			<443.>
c			<1,378.>
d			<186.>
e			<233.>
f			<179.>
g			<309.>
h			<630.>
i			<978.>
j			<8.>
k			<15.>
l			<272.>
m			<769.>
n			<2,861.>
o			0.

2 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 }

2

3 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).  
If (loss), enter "-0-" in Part I, line 8

3

THE EDWARD J. DEBARTOLO MEMORIAL  
SCHOLARSHIP FOUNDATION

CONTINUATION FOR 990-PF, PART IV  
31-1527910 PAGE 2 OF 2

**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.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	427.683 SHARES OF ALLEGIANT MID CAP VALUE	P	01/09/08	10/20/08
b	25.676 SHARES OF FIDELITY ADV MID CAP	P	01/09/08	06/19/08
c	241.228 SHARES OF FIDELITY ADV MID CAP	P	01/09/08	10/20/08
d	150.214 SHARES OF ROYCE TOTAL RETURN FUND	P	06/19/08	10/20/08
e	63.442 SHARES OF T. ROWE PRICE NEW HORIZONS	P	01/09/08	10/20/08
f	CAPITAL GAINS DIVIDENDS			
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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)
a 3,772.		5,526.	<1,754.>
b 584.		577.	7.
c 3,105.		5,423.	<2,318.>
d 1,402.		1,932.	<530.>
e 1,292.		1,830.	<538.>
f 15,919.			15,919.
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			<1,754.>
b			7.
c			<2,318.>
d			<530.>
e			<538.>
f			15,919.
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 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 }	2	10,346.
3 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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
NATIONAL CITY BANK	73.
NATIONAL CITY BANK	888.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	961.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DODGE & COX	30,201.	15,179.	15,022.
NATIONAL CITY BANK	5,109.	740.	4,369.
TOTAL TO FM 990-PF, PART I, LN 4	35,310.	15,919.	19,391.

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
GROSS INCOME FROM SPECIAL FUNDRAISING EVENTS	103,821.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	103,821.	0.	

## FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE CHARITABLE TRUST FILING FEE	200.	0.		0.
FEDERAL TAXES	2,653.	0.		0.
TO FORM 990-PF, PG 1, LN 18	2,853.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	1,287.	0.		0.
EXPENSES FROM SPECIAL FUNDRAISING ACTIVITIES	92,527.	0.		0.
TO FORM 990-PF, PG 1, LN 23	93,814.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK - NATIONAL CITY INVESTMENT	107,674.	73,931.
DODGE & COX STOCK FUND	262,476.	147,552.
DODGE & COX BALANCED FUND	474,447.	303,930.
TOTAL TO FORM 990-PF, PART II, LINE 10B	844,597.	525,413.

FORM 990-PF	CORPORATE BONDS	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS FUNDS - NATIONAL CITY INVESTMENTS	59,967.	57,415.
TOTAL TO FORM 990-PF, PART II, LINE 10C	59,967.	57,415.

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FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D	STATEMENT	8
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NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

---

CINDY MILLER  
7620 MARKET STREET  
YOUNGSTOWN, OH 44512

TELEPHONE NUMBER

---

330-965-2000

FORM AND CONTENT OF APPLICATIONS

---

EDWARD J. DEBARTOLO MEMORIAL SCHOLARSHIP APPLICATION

COPY

ANY SUBMISSION DEADLINES

---

SUBMIT INFORMATION WITHIN 15 DAYS OF RECEIVING APPLICATION.

RESTRICTIONS AND LIMITATIONS ON AWARDS

---

AWARDING SCHOLARSHIPS TO APPLICANTS WHO HAVE GRADUATED FROM A PAROCHIAL,  
PUBLIC OR PRIVATE HIGH SCHOOL IN COLUMBIANA, MAHONING OR TRUMBULL COUNTY,  
OHIO

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 9

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
TANISHA FLYNN 13233 FISH CREEK ROAD, ALLIANCE, OH 44601	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
AMANDA FRANKLIN 4233 CLARIDGE DRIVE, YOUNGSTOWN, OH 44511	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
KAYLA HANKEY 372 LOURDES LANE, CAMPBELL, OH 44405	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
JUSTIN LAWRENCE 1713 CROMWELL, YOUNGSTOWN, OH 44505	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
MICHEAL MEDURE 38350 LODGE ROAD, LEETONIA, OH 44505	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
KEITH SIMPSON 3961 RADTKA DRIVE SW, WARREN, OH 44484	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
PAIGE TAYLOR 3576 DUNBAR LANE, CORTLAND, OH 44410	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
CYNTHIA WILLIAMS 6160 METZ RD, NEW MIDDLETOWN, OH 44442	NONE 2008 SCHOLARSHIP AWARD	N/A	6,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			48,000.





# RICHARD CORDRAY

OHIO ATTORNEY GENERAL

## VERIFICATION OF FILING WITH THE INTERNAL REVENUE SERVICE

This form is to be completed by 501(c)(3) non-profit organizations, located in Ohio, that file one of the federal tax forms listed below. NOTE: This form should be filed in lieu of a copy of the federal tax return. Do not submit the federal return with this form.

I hereby certify that I am a trustee or officer of

THE EDWARD J. DEBARTOLO MEMORIAL SCHOLARSHIP FOUNDATION

(Name of Organization as filed with the Attorney General's Office)

7620 MARKET STREET

YOUNGSTOWN, OH

44512

Charity Street Address

City

Zip Code

31-1527910

(Federal Employer Identification Number)

(State Charter Number if applicable)

and that the above named organization completed and/or will complete and file: (check one)

☐ Form 990

☒ Form 990-PF

☐ Form 990-EZ

required by the Internal Revenue Service for the: (check and complete one of the following)

☒ Calendar Year 2 008

☐ Tax year beginning, 2008, and ending 2009

and that such filing occurred on/or will occur on

May 15, 2009

Did the organization request a federal extension of time to file this report? ☐ Y ☒ N

If yes, what was/is the extended due date?

(Extended Filing Due Date)

For fee purposes, please indicate the current total value of assets, or if filing this form prior to an extended federal due date, estimate the current total value of assets, at year end \$ 728,439

Name of Trustee/Officer (Please Print)

Telephone number

Signature of Trustee/Officer

Charitable E-mail Address

Trustee/Officer Title

OFFICE USE ONLY  
FILING FEE PAID

Date

Amount \_\_\_\_\_  
Date \_\_\_\_\_  
Check # \_\_\_\_\_



PRIVATE  
CLIENT  
GROUP

Charitable & Endowment Services

NATIONAL CITY BANK  
200 FEDERAL PLAZA  
YOUNGSTOWN OH 44503  
NationalCity.com/PrivateClientGroup

## ACCOUNT STATEMENT

DEBARTOLO SCHOLARSHIP AGENCY

Statement Period  
Account Number

12/01/2008 through 12/31/2008  
14 39-Y001-00-9

## SUMMARY OF ACCOUNT

ACCOUNT POSITION	Tax Cost	Market Value	Unrealized Gain/Loss
EQUITIES	\$106,858.85	\$73,930.59	\$-32,928.26
FIXED INCOME	59,967.37	57,415.29	-2,552.08
CASH AND CASH EQUIVALENTS	106,098.38	106,098.38	
<b>TOTAL ACCOUNT POSITION</b>	<b>\$272,924.60</b>	<b>\$237,444.26</b>	<b>-\$35,480.34</b>

## EQUITY DIVERSIFICATION STATEMENT

	Tax Cost	Market Value Total	Market Value Percent	Projected Annual Income	Yield
<b>DOMESTIC MUTUAL FUNDS</b>					
LARGE CAP	\$79,791.92	\$54,928.31	74.30%	\$629	1.15%
SMALL CAP	\$10,136.61	\$7,688.02	10.40%	\$102	1.33%
<b>INTERNATIONAL MARKETS</b>					
INTERNATIONAL DEVELOPED MUTUAL FUNDS	\$12,563.36	\$7,307.36	9.88%	\$290	3.97%
INTERNATIONAL EMERGING MARKET MUTUAL	\$4,368.96	\$4,006.90	5.42%	\$200	4.99%
<b>TOTAL EQUITIES</b>	<b>\$106,858.85</b>	<b>\$73,930.59</b>	<b>100.00%</b>	<b>\$1,221</b>	<b>1.65%</b>

## STATEMENT OF INVESTMENT POSITION

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
<b>EQUITIES</b>									
<b>DOMESTIC MUTUAL FUNDS</b>									
ALLEGIANTE LARGE CAP VALUE FD CLASS I #412 09/98 - 12/08									
	2,321.420	\$35,015.30	\$24,815.98	AEIIX	-\$10,199.32	33.56%	10.45%	\$281	1.13%
ISHARES TR RUSSELL MIDCAP 10/08 - 12/08									
	125.000	\$8,026.62	\$7,465.00	IWR	-\$561.62	10.10%	3.14%	\$207	2.78%
ROYCE TOTAL RETURN FD #267 06/08 - 12/08									
	444.533	\$4,968.25	\$3,867.44	RYTRX	-\$1,100.81	5.23%	1.63%	\$102	2.63%
T ROWE PRICE GROWTH STOCK FUND FD #40 06/08 - 10/08									
	1,177.096	\$36,750.00	\$22,647.33	PRGFX	-\$14,102.67	30.63%	9.54%	\$141	0.62%



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Charitable & Endowment Services



DEBARTOLO SCHOLARSHIP AGENCY

Statement Period 12/01/2008 through 12/31/2008  
Account Number 14 39-Y001-00-9

## STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date Range	Quantity	Tax Cost	Market Value	Ticker Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
T ROWE PRICE NEW HORIZONS FUND									
01/08 - 12/08									
	214.760	\$5,168.36	\$3,820.58	\$17.79	-\$1,347.78	5.17%	1.61%		
<b>TOTAL DOMESTIC MUTUAL FUNDS</b>									
		<b>\$89,928.53</b>	<b>\$62,616.33</b>		<b>-\$27,312.20</b>	<b>84.70%</b>	<b>26.37%</b>	<b>\$731</b>	<b>1.17%</b>
<b>INTERNATIONAL MARKETS</b>									
HARBOR INTERNATIONAL FUND FD#11									
INSTITUTIONAL CLASS									
01/08 - 10/08									
	96.527	\$6,282.49	\$3,872.66	\$40.12	-\$2,409.83	5.24%	1.63%	\$75	1.94%
MASTERS SELECT FDS INTL FD									
01/08 - 10/08									
	362.693	\$6,280.87	\$3,434.70	\$9.47	-\$2,846.17	4.65%	1.45%	\$215	6.26%
VANGUARD INTL EQUITY INDEX FD INC									
EMERGING MARKETS ETF									
12/08 - 12/08									
	170.000	\$4,366.96	\$4,006.90	\$23.57	-\$360.06	5.42%	1.69%	\$200	5.00%
<b>TOTAL INTERNATIONAL MARKETS</b>									
		<b>\$16,930.32</b>	<b>\$11,314.26</b>		<b>-\$5,616.06</b>	<b>15.30%</b>	<b>4.77%</b>	<b>\$490</b>	<b>4.33%</b>
<b>TOTAL EQUITIES</b>									
		<b>\$106,858.85</b>	<b>\$73,930.59</b>		<b>-\$32,928.26</b>	<b>100.00%</b>	<b>31.14%</b>	<b>\$1,221</b>	<b>1.65%</b>
<b>FIXED INCOME</b>									
<b>TAXABLE FIXED INCOME</b>									
<b>TAXABLE FUNDS</b>									
ALLEGiant INTERMEDIATE BOND FUND									
CLASS I #407									
02/99 - 12/99									
	1,404.494	\$14,967.37	\$14,887.64	\$10.60	-\$79.73	25.93%	6.27%	\$678	4.56%
DODGE & COX INCOME FD #147									
06/08 - 06/08									
	1,206.758	\$15,000.00	\$14,227.68	\$11.79	-\$772.32	24.78%	5.99%	\$815	5.72%
VANGUARD INTERM TERM INV GD FD									
#71									
06/08 - 06/08									
	1,583.949	\$15,000.00	\$13,701.16	\$8.65	-\$1,298.84	23.86%	5.77%	\$808	5.90%
VANGUARD LONG TERM INV GD FD									
#28									
06/08 - 06/08									
	881.316	\$7,500.00	\$7,685.08	\$8.72	\$185.08	13.39%	3.24%	\$455	5.92%

National City

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Charitable & Endowment Services

NATIONAL CITY BANK  
200 FEDERAL PLAZA  
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## ACCOUNT STATEMENT

DEBARTOLO SCHOLARSHIP AGENCY

Statement Period

12/01/2008 through 12/31/2008

Account Number

14 39-Y001-00-9

### STATEMENT OF INVESTMENT POSITION CONTINUED

Acq. Date	Quantity	Tax Cost	Market Value	Ticker	Price	Unrealized Gain/Loss	% of Asset Category	% of Account	Projected Annual Income	Yield
Range										
VANGUARD SHORT TERM INV GD FD				VFSTX						
#39										
06/08 - 06/08										
	714 967	\$7,500.00	\$6,913.73		\$9.67	-\$586.27	12.04%	2.91%	\$356	5.15%
<b>TOTAL TAXABLE FUNDS</b>										
		\$59,967.37	\$57,415.29			-\$2,552.08	100.00%	24.18%	\$3,112	5.42%
<b>TOTAL TAXABLE FIXED INCOME</b>										
		\$59,967.37	\$57,415.29			-\$2,552.08	100.00%	24.18%	\$3,112	5.42%
<b>TOTAL FIXED INCOME</b>										
		\$59,967.37	\$57,415.29			-\$2,552.08	100.00%	24.18%	\$3,112	5.42%
<b>CASH AND CASH EQUIVALENTS</b>										
<b>CASH EQUIVALENTS - TAXABLE</b>										
ALLEGIANTE TREASURY MONEY MARKET FUND										
05/07 - 12/08										
	106,098.380	\$106,098.38	\$106,098.38		\$1.00		100.00%	44.68%	\$530	0.50%
<b>CASH</b>										
INCOME CASH										
		\$33,538.66	\$33,538.66				31.61%	14.12%		
PRINCIPAL CASH										
		-\$33,538.66	-\$33,538.66				-31.61%	-14.12%		
<b>TOTAL CASH</b>										
<b>TOTAL CASH AND CASH EQUIVALENTS</b>										
		\$106,098.38	\$106,098.38				100.00%	44.68%	\$530	0.50%
<b>TOTAL PORTFOLIO</b>										
		\$272,924.60	\$237,444.26			-\$35,480.34	100.00%	100.00%	\$4,863	2.05%