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# Form **990-PF**

Department of the Treasury Internal Revenue Service

## **Return of Private Foundation**

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

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

OMB No 1545-0052 2008

For	caler	ndar year 2008, or tax yea	ar beginning MAY	1, 2008	, and ending	APR 30, 200	<u> </u>	
G (	Check	call that apply: 🔲 I	nıtıal return	Final return	Amended return	Address change	Name change	
lise	the	IRS Name of foundation					n number	
	label	""MARY JEAN	AND OLIVER	TRAVERS FOU	NDATION,			
		se, INC.				52-605636	00	
	print	Number and street (or P	O box number if mail is not de	elivered to street address)	Room/suite	B Telephone number		
	r type	TACE MEDIE	PENNSYLVANIA	AVENUE	300	410-296-1	392	
	Spe	Cific City or town state o				C If exemption application is	pending, check here	
IIIŞt	ructio	TOWSON, MI				D 1. Foreign organization	is, check here	
H (	Check	type of organization:	X Section 501(c)(3) ex	cempt private foundation		Foreign organizations m check here and attach of	eeting the 85% test, computation	
	] Se	ction 4947(a)(1) nonexem		Other taxable private foun	dation	E If private foundation st		
l Fa		arket value of all assets at		ng method X Cash	Accrual	under section 507(b)(1		
(fi	om i	Part II, col (c), line 16)	· · · · · · · · · · · · · · · · · · ·	ther (specify)		F If the foundation is in a	<i></i>	
	\$		7 , 9 2 5 . (Part I, colu		n basis )	under section 507(b)(		
_	art I	Analysis of Revenue ar	nd Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements	
		The total of amounts in colu necessarily equal the amour	umns (b), (c), and (d) may not nts in column (a) )	expenses per books	income	income	for charitable purposes (cash basis only)	
	1	Contributions, gifts, gran	its, etc., received			N/A		
	2	Check X If the foundation						
	3	Interest on savings and temp		430	. 430.		STATEMENT 1	
	4	Dividends and interest fro	om securities	8,175			STATEMENT 2	
	5a	Gross rents						
€	1	Net rental income or (loss)						
	_	Net gain or (loss) from sale of	assets not on line 10	174,339				
» »	Ь	Gross sales price for all assets on line 6a	176,160.					
ନ୍ଧ ଧିଜ evenue	7	Capital gain net income (from			174,339.			
	8	Net short-term capital ga						
EJAR R	9	Income modifications						
	1	Gross sales less returns and allowances				-		
	١.	Less Cost of goods sold						
		Gross profit or (loss)						
氢	11	Other income						
5	12	Total Add lines 1 through	nh 11	182,944	. 182,944.			
D)	13	Compensation of officers, dire		0			0.	
	14	Other employee salaries a						
	15	Pension plans, employee	=					
ses	16a	Legal fees						
ĕ	b	Accounting fees						
Ä	C	Other professional fees				EREWEH		
Ş.	17	Interest			يليس ا	AR 1 6 3010		
rati	18	Taxes				= 301H		
ıst	19	Depreciation and depletion	on	<u> </u>		PH I B RAID IS	<u> </u>	
喜	20	Occupancy				. 117		
Ą	21	Travel, conferences, and	meetings			GDEN, U		
Dug.	22	Printing and publications	- 					
ğ	23	Other expenses						
ati	24	Total operating and adm	nınistrative					
Operating and Administrative Expenses		expenses. Add lines 13 t		0			0.	
0	25	Contributions, gifts, gran	ts paid	46,000			46,000.	
	26	Total expenses and disb				]		
	<u> </u>	Add lines 24 and 25		46,000	. 0.		46,000.	
	27	Subtract line 26 from line	= 12:			1		
	a	Excess of revenue over expen	nses and disbursements	136,944	•			
	b	Net investment income (	(if negative, enter -0-)		182,944.		ļ	
_	c	Adjusted net income (if o	egative, enter -0-)			N/A		
		I LIA For Drive ou Act o	and Panerwork Reduction	Act Notice can the instru	ctions		Form <b>990-PF</b> (2008)	

Form 990-PF (2008) 52-6056360 Beginning of year End of year Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (a) Book Value (b) Book Value (c) Fair Market Value Cash - non-interest-bearing 25,320. 164,085. 164,085. 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 10a Investments - U.S. and state government obligations 8,493. 6,672. 153,840. b Investments - corporate stock STMT 3 c Investments - corporate bonds 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 ▶ 33,813. 170,757. 317,925. 16 Total assets (to be completed by all filers) 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 > \_ 0. 23 Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. Balances 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Fund  $\triangleright x$ Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. þ 27 Capital stock, trust principal, or current funds Assets 0. 0. 28 Paid-in or capital surplus, or land, bldg., and equipment fund 170,757 33,813. 29 Retained earnings, accumulated income, endowment, or other funds žet 30 Total net assets or fund balances 33,813. 170,757 33,813 170,757 31 Total liabilities and net assets/fund balances 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 33,813. (must agree with end-of-year figure reported on prior year's return) 136,944. 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 3 4 Add lines 1, 2, and 3 4 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

Form 990-PF (2008) 52-6056360 INC. Page 3 Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase (a) List and describe the kind(s) of property sold (e.g., real estate, (c) Date acquired (d) Date sold (mo., day, yr.) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) D - Donation SHARES BRISTOL MYERS SQUIBB 1a 1000 SHARES SCHENUIT INVESTMENTS D C d е (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 22,329 1,641 20,688. a 153,831 180. 153,651 b C d е 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 (j) Adjusted basis (k) Excess of col. (i) Losses (from col. (h)) (i) F.M V. as of 12/31/69 as of 12/31/69 over col. (j), if any 20,688. a 153,651. b C ď е If gain, also enter in Part I, line 7 174,339. 2 Capital gain net income or (net capital loss) 2 If (loss), enter -0- in Part I, line 7 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 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. Yes X No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part. Enter the appropriate amount in each column for each year; see instructions before making any entries. (d)
Distribution ratio (a) Base period years (c) Adjusted qualifying distributions Net value of noncharitable-use assets (col. (b) divided by col (c)) Calendar year (or tax year beginning in) 19,520 282,461 .069107 2007 140,666. .109479 15,400. 2006 67,928. 12,311. 5.517667 2005 11,629. 15,550. 1.337174 2004 12,700 19,528 .650348 2003 7.683775 2 2 Total of line 1, column (d) 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 1.536755 331,099. Enter the net value of noncharitable-use assets for 2008 from Part X, line 5 4 508,818. Multiply line 4 by line 3 5 Enter 1% of net investment income (1% of Part I, line 27b) 1,829. 6 510,647. 7 Add lines 5 and 6 46,000. 8 Enter qualifying distributions from Part XII, line 4 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.

MARY JEAN AND OLIVER TRAVERS FOUNDATION, Form 990-PF (2008) 52-6056360 INC. 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 and enter "N/A" on line 1. (attach copy of ruling letter if necessary-see instructions) b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 📖 and enter 1% 3,659. 1 of Part I, line 27b 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 3 3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 3,659 5 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: a 2008 estimated tax payments and 2007 overpayment credited to 2008 b Exempt foreign organizations - tax withheld at source 6b c Tax paid with application for extension of time to file (Form 8868) 60 d Backup withholding erroneously withheld 6d 7 Total credits and payments. Add lines 6a through 6d 7 8 Enter any penalty for underpayment of estimated tax. Check here \_\_\_\_\_ if Form 2220 is attached 8 3.684 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 Refunded ▶ 11 Enter the amount of line 10 to be: Credited to 2009 estimated tax 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? 1a Х Х 1b b 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 c Did the foundation file Form 1120-POL for this year? 1c Х d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 0. 0 • (2) On foundation managers. ► \$ (1) On the foundation > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 X If "Yes," attach a detailed description of the activities 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a b If "Yes," has it filed a tax return on Form 990-T for this year? N/A 4b 5 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T 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

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)

year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

10 X Form **990-PF** (2008)

6

7

8b

X

X

X

MD

remain in the governing instrument?

If "Yes," complete Part II, col (c), and Part XV

7 Did the foundation have at least \$5,000 in assets at any time during the year?

8a Enter the states to which the foundation reports or with which it is registered (see instructions)

of each state as required by General Instruction G? If "No." attach explanation

MARY JEAN AND OLIVER TRAVERS FOUNDATION,		_	
Form 990-PF (2008) INC. 52  Part VII-A   Statements Regarding Activities (continued)	<u>-605636</u>	0	Page 5
			т
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		х
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
Website address ► N/A			
14 The books are in care of ► NANCY L. DODS  Telephone no. ► 4	10-296-	1392	
	+4 <b>≥</b> 2120		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			$\Box$
and enter the amount of tax-exempt interest received or accrued during the year	;	A\N	
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?	X No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		}	
a disqualified person?	X No		
	X No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X No		
(5) Transfer any income or assets to a disqualified person (or make any of either available			1
for the benefit or use of a disqualified person)?	X No		
(6) Agree to pay money or property to a government official? (Exception. Check "No"			ĺ
if the foundation agreed to make a grant to or to employ the official for a period after	_		
, , ,	X 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		1 1	
	N/A 1b		<del> </del>
Organizations relying on a current notice regarding disaster assistance check here			
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?	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?	X No		į
If "Yes," list the years $\blacktriangleright$ ,,,,,,			
b Are there any years listed in 2a for which the foundation is <b>not</b> 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			
·	N/A 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?	X No		i
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	se		
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)	Ŋ/A <u>3b</u>		

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

had not been removed from jeopardy before the first day of the tax year beginning in 2008?

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

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4<u>a</u>

4b

MARY JEAN AND OLIVER TRA	AVERS FOUNDATI	ON,	52-60563	260 pag	
Form 990-PF (2008) INC. Part VII-B   Statements Regarding Activities for Which	Form 4720 May Be I	Required (contin		360 Pag	e c
5a During the year did the foundation pay or incur any amount to:	Tom Had may bo !	toquii ou (comii	1000)		_
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	on 4945(e))?		es X No		
(2) Influence the outcome of any specific public election (see section 4955);			23 (22) 110		
any voter registration drive?	or to carry on, uncomy or main		es X No	i l	
(3) Provide a grant to an individual for travel, study, or other similar purpose	c?		es X No	1 1	
(4) Provide a grant to an organization other than a charitable, etc., organization			3 (22) 140		
509(a)(1), (2), or (3), or section 4940(d)(2)?	on described in section		es X No	1 1	
(5) Provide for any purpose other than religious, charitable, scientific, literary	or educational nurnoses, or t		55 (22) 140		
the prevention of cruelty to children or animals?	y, or concational purposes, or		es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify ur	nder the excentions described i		38 (22) 140		
section 53.4945 or in a current notice regarding disaster assistance (see instr		iii ricgulations	N/A	5b	
Organizations relying on a current notice regarding disaster assistance check			<b>№</b> —	<del></del>	_
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption		ınad		1 1	
expenditure responsibility for the grant?			es 🗀 No		
If "Yes," attach the statement required by Regulations section 53.494		1/22			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to					
a personal benefit contract?	pay promiums on	□ v.	es X No	] ]	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	nerconal henefit contract?			6b X	7
If you answered "Yes" to 6b, also file Form 8870	personal bolletit contract.			23	-
7a At any time during the tax year, was the foundation a party to a prohibited tax	chalter transaction?		es X No		
b If yes, did the foundation receive any proceeds or have any net income attribu			<del>-</del> -	7b	-
Information About Officers Directors True		nagers Highly		70	_
Part VIII Paid Employees, and Contractors	tooo, r ouridation ma	inagoro, mgm,	,		
1 List all officers, directors, trustees, foundation managers and their	compensation.				_
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans	(e) Expense	e
(a) Name and address	hours per week devoted to position	(if not paid, enter -0-)	and deferred compensation	account, oth allowances	
OLIVER S. TRAVERS, JR.	PRESIDENT/DIR				
780 S. COLLIER BOULEVARD, UNIT 206					
MARCO ISLAND, FLA 34145	0.00	0.	0.	l o	١.
MARY JEAN TRAVERS	VICE-PRESIDEN				
780 S. COLLIER BOULEVARD, UNIT 206					
MARCO ISLAND, FLA 34145	0.00	0.	0.	0	١.
NANCY DODS	SECRETARY/TRE	ASURER/DI			
216 BRACKENWOOD COURT					
TIMONIUM, MD 21093	1.00	0.	0.	.l o	) <u>.</u>
	1				
2 Compensation of five highest-paid employees (other than those in	cluded on line 1). If none,	enter "NONE."			
(a) Name and address of each employee had more than \$50,000	(b) Title, and average	(a) Componenties	(d) Contributions to employee benefit plans and deferred	(e) Expense account, oth	8
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	allowances	;
NONE					
	_				
	1		:	1	
	1	ı		1	

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

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Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	r "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		<b>b</b> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statis number of organizations and other beneficiaries served, conferences convened, research papers produced to the conference of the conferenc	tical information such as the duced, etc.	Expenses
1N/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		
		<u> </u>
All other program-related investments. See instructions.  3		
Total. Add lines 1 through 3	<b>&gt;</b>	0.

INC.

4940(e) reduction of tax in those years.

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Part X 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 233,819. 1a 102,322 b Average of monthly cash balances 1b c Fair market value of all other assets 10 336,141. d Total (add lines 1a, b, and c) 1d e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e 2 Acquisition indebtedness applicable to line 1 assets 336,141. 3 Subtract line 2 from line 1d 3 5,042. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 331,099. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 16,555. Minimum investment return. Enter 5% of line 5 Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain Part XI foreign organizations check here 

and do not complete this part.) 16,555. Minimum investment return from Part X, line 6 3,659. Tax on investment income for 2008 from Part VI, line 5 Income tax for 2008. (This does not include the tax from Part VI.) 2c 3,659. c Add lines 2a and 2b 12,896. Distributable amount before adjustments. Subtract line 2c from line 1 3 3 Recoveries of amounts treated as qualifying distributions 4 12,896. Add lines 3 and 4 5 5 6 Deduction from distributable amount (see instructions) 6 12,896. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 1 46,000. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a b Program-related investments - total from Part IX-B 16 2 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes Amounts set aside for specific charitable projects that satisfy the: 3 a Suitability test (prior IRS approval required) 3a **b** Cash distribution test (attach the required schedule) 3b 46,000. 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 4 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 46.000. 6 Adjusted qualifying distributions. Subtract line 5 from line 4 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

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Part XIII Undistributed Income (see instructions)

	·	4.5	(-)	(4)
	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI,	Обіраз	rears prior to 2007	2007	
line 7				12,896.
2 Undistributed income, if any, as of the end of 2007				12,050.
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>b</b> From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			<u> </u>
4 Qualifying distributions for 2008 from				
Part XII, line 4: ► \$ 46,000.				
a Applied to 2007, but not more than line 2a			0.	
<b>b</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				12,896.
e Remaining amount distributed out of corpus	33,104.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	33,104.			
b Prior years' undistributed income. Subtract	3372011			
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.		· · · · · · · · · · · · · · · · · · ·	<del></del>
9 Excess distributions carryover to 2009	22 424			
Subtract lines 7 and 8 from line 6a	33,104.	<del></del>		
10 Analysis of line 9				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006 d Excess from 2007				
e Excess from 2008 33, 104.				
5 LAUGSS II UIII 2000 33, 104.			<u></u>	5 000 DE (0000)

MARY JEAN AND OLIVER TRAVERS FOUNDATION, 52-6056360 Form 990-PF (2008) INC 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(1)(5) Prior 3 years Tax year 2 a Enter the lesser of the adjusted net (a) 2008 (b) 2007 (c) 2006 (d) 2005(e) Total 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 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(i)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income 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.) 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. Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here Lifthe 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. NANCY DODS, 410-296-1392 102 W. PENNSYLVANIA AVENUE, SUITE 300, TOWSON, MD 21204 b The form in which applications should be submitted and information and materials they should include:

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

IRC 501 (C)(3) TAX EXEMPT ORGANIZATIONS ONLY

Form **990-PF** (2008)

NONE

TYPEWRITTEN LETTER
c Any submission deadlines:

Form 990-PF (2008)

INC.

52-6056360

Page 11

Part XV Supplementary Information	(continued)			
3 Grants and Contributions Paid During the Ye	ear or Approved for Future	Payment		
Recipient	If recipient is an individual,	Foundation	Purpose of grant or	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
		IRC 501		46 000
	NONE	(C)(3)	UNRESTRICTED	46,000
				}
Total			<b>▶</b> 3a	46,000
<b>b</b> Approved for future payment				
NONE				
Total			► 3h	0

Form 990-PF (2008)

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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelate	d business income		y section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	( <b>b)</b> Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a					
b	_				
c					
d		_			
e					
f					
g Fees and contracts from government agencies		<u></u>			
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14	430.	
4 Dividends and interest from securities			14	8,175.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property	-				
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
3 Gain or (loss) from sales of assets other					
than inventory			18	174,339.	
9 Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory					
1 Other revenue:					
a					
b	_				
С					<del></del>
d	l l				
e	_				
2 Subtotal. Add columns (b), (d), and (e)	_	0		182,944.	0
3 Total. Add line 12, columns (b), (d), and (e)				13	182,944
See worksheet in line 13 instructions to verify calculations.	)	<u> </u>			
Part XVI-B Relationship of Activities	s to the Acco	mplishment of E	Exempt P	urposes	
		· <del></del>		<u> </u>	link mout of
Line No Explain below how each activity for which in the foundation's exempt purposes (other the				importantly to the accomp	iisnment of
the localization a exempt purposes (other th	an by providing fur	103 101 30011 purposes).	<del></del>	· <del></del> -	
				<del> </del>	<del></del>
	· · · · · · · · · · · · · · · · · · ·	<del></del>	<del></del>	<del></del>	
				<del></del>	
				<del></del>	
		<del></del>			<del></del>
<del>-</del>					
		<del></del>			
	<del></del>			-	

1122 KENILWORTH DRIVE,

TOWSON, MARYLAND 21204

Form 990-PF (2008) INC. 52-6056360 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No 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 1a(1) (2) Other assets 1a(2) Other transactions: (1) Sales of assets to a noncharitable exempt organization 1b(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) 1b(3) (3) Rental of facilities, equipment, or other assets 1b(4) (4) Reimbursement arrangements (5) Loans or loan guarantees 1b(5) (6) Performance of services or membership or fundraising solicitations 1b(6) Sharing of facilities, equipment, mailing lists, other assets, or paid employees 1c 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 foundation. 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. (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described X Nn in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes b If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge Signature of officer or Justee Date Check if Preparer's identifying number Preparer's self-employed > signature WILKINS, LITTLE & MATTHEWS EIN ▶ Firm's name (or yours

SUITE 413

Form **990-PF** (2008)

410-494-0885

Phone no.

FORM 8688

EXPLANATION FOR EXTENSION

STATEMENT

### EXPLANATION

TAXPAYER IS CURRENTLY CORRESPONDING WITH THE INTERNAL REVENUE SERVICE REGARDING ITS REFUND FROM LAST YEAR, AND REQUESTS AN EXTENSION OF TIME UNTIL THE AMOUNT OF THE REFUND APPLIED TO ITS CURENT YEAR RETURN IS DETERMINED AND AGREED UPON.

# MARY JEAN AND OLIVER TRAVERS FOUNDATION CONTRIBUTIONS - FY APRIL 30, 2009

Boxe' Latin School	822 West I ake Avenue / Baltimore MD 21210	05/08/08	30000
Cystic Fibrosis Foundation	10155 York Road, Suite 101 / Cockeysville MD 21030	02/08/08	200
St. Paul's School Annual Fund	P. O. Box 8100 / Brooklandville MD 21022-9980	06/16/08	2500.
St. Paul's School for Girls	P. O. Box 8000 / Brooklandville MD 21022-8000	06/16/08	2500.
UMMS Foundation	110 South Paca Street, 9th Floor / Baltimore MD 21201	02/30/08	5000
Lutherville Volunteer Fire Company	P. O. Box 232 / Lutherville MD 21094-0232	09/16/08	200
Bethany Beach Volunteer Fire Company	P. O. Box 950 / Bethany Beach DE 19930	10/14/08	200.
Maryland Art Place	8 Market Place, Suite 100 / Baltimore MD 21202	10/14/08	1250.
Carroll Hospice	292 Stoner Avenue / Westminster MD 21157	10/14/08	300.
Greek Annunciation Cathedral	24 West Preston Street / Baltimore MD 21201	10/21/08	300.
National Jewish Health	210 North Lee Street, Suite 202 / Alexandria VA 22314	12/04/08	500.
Cystic Fibrosis Foundation	10155 York Road, Suite 101 / Cockeysville MD 21030	12/06/08	250
Timonium United Methodist Church	2300 Pot Spring Road / Timonium MD 21093	12/30/08	300.
Johns Hopkins Institutions	100 North Charles Street, Suite 429 / Baltimore MD 21201	01/08/09	300.
National 4-H Council	7100 Connecticut Avenue / Chevy Chase MD 20815-4999	01/14/09	200
Timonium United Methodist Church	2300 Pot Spring Road / Timonium MD 21093	01/28/09	500.
Alzheimer's Association	1850 York Road, Suite D / Timonium MD 21093	04/04/09	500
St. Paul's School	11152 Falls Road / Brooklandville MD 21022-8100	04/09/09	500.
St. Paul's School for Girls	P O Box 8000 / Brooklandville MD 21022-8000	04/09/09	500

TOTAL \$ 46,000.

FORM 990-PF INTEREST ON SAVINGS A	ND TEMPORARY C	ASH INVESTMENTS	STATEMENT 1
SOURCE			AMOUNT
CITIGROUP/SMITH BARNEY			430.
TOTAL TO FORM 990-PF, PART I, LINE	3, COLUMN A		430.
FORM 990-PF DIVIDENDS AND	INTEREST FROM	SECURITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CITIGROUP/SMITH BARNEY SCHENUIT INVESTMENTS	7,210. 965.	0.	7,210. 965.
TOTAL TO FM 990-PF, PART I, LN 4	8,175.	0.	8,175.
FORM 990-PF CO	RPORATE STOCK		STATEMENT 3
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
		6,672.	153,840.
TOTAL TO FORM 990-PF, PART II, LIN	E 10B	6,672.	153,840.

· ,	900 P. J. 6000			
Form 8	868 (Rev. 4-2009)			Page 2
	Du are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this bo			$\triangleright$ X
	Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed	Form	8868	
	ou are filing for an Automatic 3-Month Extension, complete only Part I (on page 1)		<del></del>	
Part	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no co	pies r	needed)	
Туре	Name of Exempt Organization	Emp	loyer identificat	on number
print	MARY JEAN AND OLIVER TRAVERS FOUNDATION,			_
	INC.	5	<u>2-605636</u>	0
File by ti extende	Number, street, and room or suite no. If a P O box, see instructions	For II	RS use only	
due date filing the			_	
return S	City, town or post office, state, and ZIP code. For a foreign address, see instructions			
instructi	TOWSON, MD 21204			
Check	t type of return to be filed (File a separate application for each return)			
	Form 990 Form 990-EZ Form 990-T (sec. 401(a) or 408(a) trust) Form 1041-A	Fo	orm 5227	Form 8870
	Form 990-BL X Form 990-PF Form 990-T (trust other than above) Form 4720	Fo	rm 6069	
0700			15 0000	
STOP	Do not complete Part II if you were not already granted an automatic 3-month extension on a previous	sly file	a Form 8868.	
	NANCY L. DODS			
• The	books are in the care of > 102 W. PENNSYLVANIA AVE., STE 300, TOWS	ON,	MD - 2	L204
	ephone No ► 410-296-1392 FAX No ►			
	ne organization does not have an office or place of business in the United States, check this box			•
	is is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If thi	s is foi	the whole group	, check this
box 🕨				
	request an additional 3-month extension of time until MARCH 15, 2010			
	For calendar year, or other tax year beginning MAY 1, 2008, and ending	APR	30, 2009	)
	f this tax year is for less than 12 months, check reason		Change in accou	
	State in detail why you need the extension		g	, 3 F
-	SEE STATEMENT 4			
=			· -	
8a	f 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	\$	368.
-	f this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated			<u></u>
	ax payments made Include any prior year overpayment allowed as a credit and any amount paid			
	previously with Form 8868	8b	<b>¢</b>	368.
-	Balance Due. Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit	- 00	<del></del>	3001
	with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	\$	0.
	Signature and Verification	00	Ψ	
Inder r	Signature and Vernication  Penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the	hact o	Fmy knowledge se	1 haliaf
	renames of perjury, i deciare that i have examined this form, including accompanying schedules and statements, and to the B, correct, and complete, and that I am authorized to prepare this form.	7621 A	iny kilowieuge ali	י מפוופו,
Signatu		Data	_	
orgiialu	re ▶ Title ▶	_ Date		