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

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 JUL 1, 2008, and ending JUN 30, 2009

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 PHOENIXVILLE COMMUNITY HEALTH FOUNDATION		A Employer identification number 23-2912035
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 821 GAY STREET		B Telephone number 610-917-9890
	City or town, state, and ZIP code PHOENIXVILLE, PA 19460		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) \$ 39,407,942.		J Accounting method: <input type="checkbox"/> Cash <input checked="" 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"/>
			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		22,070.		N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		1,432,125.	1,432,125.		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-488,182.			STATEMENT 1
b Gross sales price for all assets on line 6a		5,320,022.			
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		1,702.	0.		STATEMENT 2
12 Total. Add lines 1 through 11		967,715.	1,432,125.		
13 Compensation of officers, directors, trustees, etc		149,659.	29,932.		119,727.
14 Other employee salaries and wages		191,021.	38,204.		152,817.
15 Pension plans, employee benefits		66,570.	13,134.		53,436.
16a Legal fees STMT 3		34,397.	6,879.		27,518.
b Accounting fees STMT 4		30,799.	6,160.		24,639.
c Other professional fees STMT 5		31,079.	6,215.		24,864.
17 Interest					
18 Taxes STMT 6		45,678.	21,384.		24,294.
19 Depreciation and depletion		18,012.	3,602.		
20 Occupancy		77,959.	15,392.		62,367.
21 Travel, conferences, and meetings		4,318.	864.		3,454.
22 Printing and publications		6,876.	1,376.		5,500.
23 Other expenses STMT 7		125,320.	58,716.		63,778.
24 Total operating and administrative expenses. Add lines 13 through 23		781,688.	201,858.		562,394.
25 Contributions, gifts, grants paid		2,013,003.			2,236,432.
26 Total expenses and disbursements. Add lines 24 and 25		2,794,691.	201,858.		2,798,826.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-1,826,976.			
b Net investment income (if negative, enter -0-)			1,230,267.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	495,517.	388,975.	388,975.
	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	17,244.	16,769.	16,769.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 10	29,886,162.	23,382,311.	23,382,311.
	c Investments - corporate bonds STMT 11	17,297,928.	12,575,573.	12,575,573.
11 Investments - land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶ 170,223.				
Less accumulated depreciation STMT 12 ▶ 101,409.	77,444.	68,814.	68,814.	
15 Other assets (describe ▶ STATEMENT 13)	1,754,118.	1,928,041.	2,975,500.	
16 Total assets (to be completed by all filers)	49,528,413.	38,360,483.	39,407,942.	
Liabilities	17 Accounts payable and accrued expenses	5,295.	13,322.	
	18 Grants payable	318,429.	95,000.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	323,724.	108,322.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	47,429,249.	36,819,113.	
	25 Temporarily restricted			
	26 Permanently restricted	1,775,440.	1,433,048.	
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances	49,204,689.	38,252,161.		
31 Total liabilities and net assets/fund balances	49,528,413.	38,360,483.		

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	49,204,689.
2 Enter amount from Part I, line 27a	2	-1,826,976.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 9	3	173,923.
4 Add lines 1, 2, and 3	4	47,551,636.
5 Decreases not included in line 2 (itemize) ▶ DECREASE IN FMV OF SECURITIES	5	9,299,475.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	38,252,161.

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 SEE ATTACHED STATEMENT	P		
b SEE ATTACHED STATEMENT	P		
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 5,197,007.		5,675,228.	-478,221.
b 123,015.		132,976.	-9,961.
c			
d			
e			

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			-478,221.
b			-9,961.
c			
d			
e			

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	-488,182.
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	3,126,836.	51,328,836.	.060918
2006	2,457,039.	53,347,642.	.046057
2005	2,753,026.	49,683,113.	.055412
2004	1,783,254.	45,407,953.	.039272
2003			

2 Total of line 1, column (d)	2	.201659
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	.050415
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	40,324,051.
5 Multiply line 4 by line 3	5	2,032,937.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	12,303.
7 Add lines 5 and 6	7	2,045,240.
8 Enter qualifying distributions from Part XII, line 4	8	2,798,826.

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.

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	12,303.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	2	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	12,303.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	12,303.
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	6a	48,720.
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	48,720.
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	36,417.
11	Enter the amount of line 10 to be: Credited to 2009 estimated tax <input checked="" type="checkbox"/> 36,417. Refunded <input type="checkbox"/> 0.	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
2 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>PA</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

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 ► <u>WWW.PCHF1.ORG</u>	13	X	
14	The books are in care of ► <u>LOUIS J. BECCARIA, PHD</u> Telephone no. ► <u>610-917-9890</u> Located at ► <u>821 GAY STREET, PHOENIXVILLE, PA</u> ZIP+4 ► <u>19460</u>			
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	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?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? If "Yes," list the years ► _____ , _____ , _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	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?	<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.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?		4b

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes ☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

☒

5b

X

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

X

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.

☐ Yes ☒ No

7b

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

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
SEE STATEMENT 14		149,659.	13,902.	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

Form 990-PF (2008)

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	37,409,115.
b	Average of monthly cash balances	1b	460,963.
c	Fair market value of all other assets	1c	3,068,045.
d	Total (add lines 1a, b, and c)	1d	40,938,123.
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	40,938,123.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	614,072.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	40,324,051.
6	Minimum investment return. Enter 5% of line 5	6	2,016,203.

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	2,016,203.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	12,303.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	12,303.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,003,900.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,003,900.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,003,900.

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	2,798,826.
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,798,826.
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	12,303.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,786,523.

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				2,003,900.
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				
c From 2005				
d From 2006				
e From 2007	521,686.			
f Total of lines 3a through e	521,686.			
4 Qualifying distributions for 2008 from Part XII, line 4: ► \$ 2,798,826.				
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				2,003,900.
e Remaining amount distributed out of corpus	794,926.			
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	1,316,612.			
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	1,316,612.			
10 Analysis of line 9:				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007	521,686.			
e Excess from 2008	794,926.			

N/A

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

☐ 4942(i)(3) or ☐ 4942(i)(5)

- b 85% of line 2a

- 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(i)(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**

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 15

- 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:

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<p><i>a Paid during the year</i></p> <p>ACADEMIC SCHOLARSHIP GRANTS - SEE ATTACHED SCHEDULE</p> <p>CHAMPIONS OF THE COMMUNITY GRANTS - SEE ATTACHED SCHEDULE</p> <p>GENERAL GRANTS - SEE ATTACHED SCHEDULE</p> <p>HEALTH EDUCATION MINI-GRANT - SEE ATTACHED SCHEDULE</p> <p>MATCH CONTRIBUTION - SEE ATTACHED SCHEDULE</p>				<p>35,000.</p> <p>8,000.</p> <p>2172427.</p> <p>2,815.</p> <p>18,190.</p>
Total			▶ 3a	2236432.
<i>b Approved for future payment</i>				
Total SEE STATEMENT 16			▶ 3b	95,000.

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
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.		

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- 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.

Sign Here

Signature of officer or trustee

Date _____

Title

Preparer's
signature

Date _____

☐ Check if self-employed

Preparer's identifying number

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

KIMMEL, LORAH + ASSOCIATES CPA'S, LLP
400 CRESSON BLVD., P.O. BOX 979
OAKS, PA 19456

EIN ▶ 23-1380332

Phone no. (610) 666-0450

Form **990-PF** (2008)

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
SCHOLARSHIP GRANT LIST
7/1/08 – 6/30/09**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Brady, Mary Kate	2101 Fort Bevon Road Harleysville, PA 19438	Academic Scholarship	None	8/18/08	1,000
Brady, Mary Kate	2101 Fort Bevon Road Harleysville, PA 19438	Academic Scholarship	None	1/9/09	1,000
Brett, Deirdre	2632 N. Charlotte Street Pottstown, PA 19383	Academic Scholarship	None	9/23/08	1,000
Brett, Deirdre	2632 N. Charlotte Street Pottstown, PA 19383	Academic Scholarship	None	1/26/09	1,000
Curran, Katharine Elizabeth	51 Church Road Malvern, PA 19355	Academic Scholarship	None	7/28/08	1,000
Curran, Katharine Elizabeth	51 Church Road Malvern, PA 19355	Academic Scholarship	None	1/29/08	1,000
Douglas, Scott R.	2647 Amy Drive Eagleville, PA 19403	Academic Scholarship	None	6/11/09	1,000
Dutton, John	1863 Pottstown Pike Glenmoore, PA 19343	Academic Scholarship	None	7/28/08	1,000
Dutton, John	1863 Pottstown Pike Glenmoore, PA 19343	Academic Scholarship	None	1/26/09	1,000
Elliott, Emily	657 Old Schuylkill Road Pottstown, PA 19465	Academic Scholarship	None	7/28/08	1,000
Elliott, Emily	657 Old Schuylkill Road Pottstown, PA 19465	Academic Scholarship	None	12/28/08	1,000
Fuga, Stephanie N.	1014 Riverwalk Drive Phoenixville, PA 19460	Academic Scholarship	None	9/11/08	1,000
Fuga, Stephanie N.	1014 Riverwalk Drive Phoenixville, PA 19460	Academic Scholarship	None	1/30/09	1,000
Fusco, Nicholas	123 Trotter Drive Phoenixville, PA 19460	Academic Scholarship	None	7/23/08	1,000
Giraldi, Arianna Marie	145 Buckwalter Road Royersford, PA 19465	Academic Scholarship	None	7/28/08	1,000
Giraldi, Arianna Marie	145 Buckwalter Road Royersford, PA 19465	Academic Scholarship	None	1/15/09	1,000
Guest, Bradley	1197 Prizer Road Pottstown, PA	Academic Scholarship	None	10/15/08	1,000
Guest, Bradley	1197 Prizer Road Pottstown, PA	Academic Scholarship	None	3/5/09	1,000
Hengemihle, Ashley M.	2710 Sycamore Avenue Audobon, PA 19403	Academic Scholarship	None	7/7/08	1,000
Hengemihle, Ashley M.	2710 Sycamore Avenue Audobon, PA 19403	Academic Scholarship	None	1/9/09	1,000
Kronmuller, Danielle	78 Ridge Road Phoenixville, PA	Academic Scholarship	None	8/28/08	1,000
Kronmuller, Danielle	78 Ridge Road Phoenixville, PA	Academic Scholarship	None	3/25/09	1,000
Kuhn, Nicole	489 Delores Drive Collegeville, PA	Academic Scholarship	None	9/5/08	1,000
Kuhn, Nicole	489 Delores Drive Collegeville, PA	Academic Scholarship	None	1/26/09	1,000
Kuhn, Nicole	489 Delores Drive Collegeville, PA	Academic Scholarship	None	6/3/09	1,000
Michener, Jennifer	603 Coventry Point Lane Pottstown, PA 19465	Academic Scholarship	None	8/18/08	1,000

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Michener, Jennifer	603 Coventry Point Lane Pottstown, PA 19465	Academic Scholarship	None	1/15/09	1,000
Moyer, Jeffrey Alan	3728 Stoughton Road Collegeville, PA 19426	Academic Scholarship	None	9/11/08	1,000
Moyer, Jeffrey Alan	3728 Stoughton Road Collegeville, PA 19426	Academic Scholarship	None	4/29/09	1,000
Scott, Jessie	141 Maryhill Road Phoenixville, PA 19460	Academic Scholarship	None	8/18/08	1,000
Scott, Jessie	141 Maryhill Road Phoenixville, PA 19460	Academic Scholarship	None	1/29/09	1,000
Shultz, Kelsey	PO Box 241 Parkerford, PA 19457	Academic Scholarship	None	9/5/08	1,000
Valko, Courtney	62 Kenalcon Drive Phoenixville, PA 19460	Academic Scholarship	None	8/28/08	1,000
Valko, Courtney	62 Kenalcon Drive Phoenixville, PA 19460	Academic Scholarship	None	1/15/09	1,000
Winston, Janay	611 St. Mary Street Phoenixville, PA 19460	Academic Scholarship	None	9/3/08	1,000
Total Academic Scholarship Grants					35,000

Audit File... Grant list scholarships 2008 2009

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
CHAMPIONS OF THE COMMUNITY GRANT LIST
7/1/08-6/30/09

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Habitat for Humanity	PO Box 1452 Coatesville, PA	At request of Arthur Munson - Champion of the Community Awardee	None	11/14/08	1,000
Open Hearth	101 North Main Street Spring City, PA	At request of Arthur Munson - Champion of the Community Awardee	None	11/14/08	1,000
Phoenix Village Arts Center	207-209 Bridge Street Phoenixville, PA	At request of Kathy Bestwick - Champion of the Community Awardee	None	11/14/08	2,000
Phoenixville Community Education Foundation	1120 South Gay Street Phoenixville, PA	At request of Cheryl Messere - Champion of the Community Awardee	None	11/14/08	2,000
St. Mary's Franciscan Shelter	209 Emmett Street Phoenixville, PA	At request of Sister Emma Steckel - Champion of the Community Awardee	None	11/14/08	2,000
					8,000

Audit ... Grant List Champions 2008 2009

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Audit ... ANALYSIS OF GRANTS
July 1, 2008 - June 30, 2009

	Grantee		Grant Purpose	Amount of Grant(s) Paid
01/31/2009	Adult Care of Chester County	201 Sharp Lane Exton, PA	New telephone system	4,000
01/31/2009	American Cancer Society	c/o PASD, 1120 Gay Street Phoenixville, PA	Phoenixville Relay for Life	1,500
09/30/2008	American Lung Association	1021 Gilpin Avenue Wilmington, DE	Freedom From Smoking facilitator	1,200
7/18/08 Dep	Arc of Chester County	900 Lawrence Drive West Chester, PA	Return of Respite Care Grant	(9,582.94)
01/31/2009	Arc of Chester County	900 Lawrence Drive West Chester, PA	Medical habilitation coordinator and services for families living	10,500
09/30/2008	Astral Artistic Services	230 S. Broad Street Phila., PA	Community Classics program	12,000
09/30/2008	Baptist Church of Phoenixville	Penn & South Streets Phoenixville, PA	Joyful Servants Food Pantry	5,000
01/31/2009	BCS Yes	588 North Gulph Road King of Prussia, PA	Clothing for group home / shelter youth	7,500
09/30/2008	Bournelyf Special Camp	1066 South New Street West Chester, PA	Administrative support	5,000
07/23/2008	Bridge of Hope	1516 Olive Street Coatesville, PA	Phoenixville Incentive for Endowment grant	25,000
09/30/2008	Bridge of Hope	1516 Olive Street Coatesville, PA	Program director support	5,000
09/30/2008	Bryn Mawr Rehabilitation Hospital	414 Paoli Pike Malvern, PA	Cruzin' not Boozin' program	4,000
08/27/2008	Camphill Village Kimberton Hills	PO Box 145 Kimberton, PA	Matching Grant in support of Aging in Community program	10,000
09/30/2008	Camphill Village Kimberton Hills	PO Box 145 Kimberton, PA	Aging in Community program	20,000
09/30/2008	Cares Food Network	540 Union Street West Chester, PA	Hunger prevention program	20,000
05/08/2009	CAT-Pickering	1580 Charlestown Road Phoenixville, PA	Scholarship award for graduating senior	1,000
09/30/2008	Center on Hearing and Deafness	139 W. Market Street West Chester, PA	Staff support	10,000
09/30/2008	Chester County Cooperative Extension	601 Westtown Road West Chester, PA	4-H park Springs program	8,000
10/10/08 Dep	Chester County Department of Aging	PO Box 2747 West Chester, PA	Return of Respite Care Grant	(10,381)
05/15/2009	Chester County Futures	704 Haywood Drive Exton, PA	Program support	10,000
01/31/2009	Chester County Health Department	PO Box 2747 West Chester, PA	Cribs for Kids project	2,500
07/28/2008	Chester County OIC	790 East Market Street West Chester, PA	Nurse Aid program	12,500
09/30/2008	Citizen Advocacy of Chester County	205 Church Street Phoenixville, PA	Operating support	5,000
06/11/2009	Citizen Advocacy of Chester County	205 Church Street Phoenixville, PA	Matching grant in support of operating expenses	7,000
01/31/2009	Community Services of Devereaux	1041 W. Bridge Street Phoenixville, PA	Training for effective parenting program	2,500

Audit ... ANALYSIS OF GRANTS

July 1, 2008 - June 30, 2009

	Grantee		Grant Purpose	Amount of Grant(s) Paid
09/30/2008	Crime Victims Center of Chester County	PO Box 738 West Chester, PA	Operating support and support for PAVPN	27,000
09/30/2008	Daemion Counseling Center	PO Box 77 Berwyn, PA	Operating support	5,000
09/30/2008	Delaware County Community College	901 S. Media Line Road Media, PA	Tuition assistance	27,429
09/30/2008	Delaware Valley Grantmakers	230 S. Broad Street Phila., PA	Operating support	6,000
05/15/2009	Delaware Valley Grantmakers	230 S. Broad Street Phila., PA	Operating support as funding partner	3,750
8/7/08 Dep	Devereaux Foundation	1041 W. Bridge Street Phoenixville, PA	Return of Respite Care Grant	(1,314)
05/15/2009	Domestic Violence Center of Chester County	PO Box 832 West Chester, PA	Part-time counselor/advisor	30,000
09/30/2008	Dragonfly Forest, Inc.	1100 E. Hector Street Conshohocken, PA	Medical component of 2008 camp	5,000
07/16/2008	Family Service of Chester County	310 N. Matlack Street West Chester, PA	Phoenixville Incentive for Endowment grant	25,000
01/31/2009	Family Service of Chester County	310 N. Matlack Street West Chester, PA	Operating support	30,000
09/30/2008	Fellowship Health Resources	25 Blackstone Valley Place Lincoln, Rhode Island	Fund development office	40,000
05/15/2009	First Presbyterian Church of Phoenixville	145 Main Street Phoenixville, PA	Purchase of AEDs	2,737
09/30/2008	Freedom Valley YMCA	2460 Blvd. of the Generals West Norriton, PA	Fingerprint scan system	5,500
05/15/2009	Freedom Valley YMCA	2460 Blvd. of the Generals West Norriton, PA	Health intervention program for kids	4,000
01/09/2009	Freedom Valley YMCA	2460 Blvd. of the Generals West Norriton, PA	Renovation and expansion PHX YMCA and Scholarships	50,000
09/30/2008	Gateway Employment Resources	342 West Ridge Pike Limerick, PA	Employment training and services	5,000
04/03/2009	Gateway Employment Resources	342 West Ridge Pike Limerick, PA	Matching grant in support of employment training and services	5,000
09/30/2008	Good Samaritan Shelter	PO Box 514 Phoenixville, PA	Operating support	10,000
02/23/2009	Good Samaritan Shelter	PO Box 514 Phoenixville, PA	September 2008 matching grant for operating support	10,000
07/16/2008	Good Works	PO Box 1441 Coatesville, PA	Phoenixville Incentive for Endowment grant	25,000
09/30/2008	Good Works	PO Box 1441 Coatesville, PA	Weatherization project	18,200
06/26/2009	Good Works	PO Box 1441 Coatesville, PA	Matching grant in support of operating expenses	5,000
06/26/2009	Good Works	PO Box 1441 Coatesville, PA	PIE Matching Grant in support of operating expenses	25,000
01/31/2009	Good Works, Inc.	PO Box 1441 Coatesville, PA	Operating support	3,000

Audit ... ANALYSIS OF GRANTS
July 1, 2008 - June 30, 2009

	Grantee		Grant Purpose	Amount of Grant(s) Paid
02/13/2009	Grace Evangelical Church	594 Church Street Royersford, PA	September 2008 matching grant in support of installation of elevator	25,000
09/30/2008	Grantmakers In Health	1100 Connecticut Avenue, NW Washington, DC	Operating support	2,500
02/24/2009	Green Valleys Association	1368 Prizer Road Pottstown, PA	Education programs review and evaluation	8,000
09/30/2008	Handi-Crafters, Inc.	PO Box 72646 Thorndale, PA	Vocational rehabilitation workshop	10,000
09/11/2008	Holcomb Behavioral Health Systems		Matching grant in support of Cornerstone Club House	5,000
01/31/2009	LaSalle University Nonprofit Center	1900 West Olney Avenue Philadelphia, PA	Technical assistance	10,000
09/30/2008	Lincoln Center for Family and Youth	408 East 4th Street Bridgeport, PA	Move Ahead program	6,000
09/30/2008	Little Angels Day Care	PO Box 172 Phoenixville, PA	Operating, program, equipment and supplies	5,000
09/30/2008	Lower Pottsgrove Township Police Department	2199 Buchert Road Pottstown, PA	Purchase of AEDs	8,000
09/30/2008	Lower Providence Community Center and Ambulance	PO Box 8 Eagleville, PA	Life Pak 12 cardiac emergency equipment	15,000
09/30/2008	Lower Providence Township	100 Parklane Drive Eagleville, PA	Purchase of AEDs	10,000
05/15/2009	Magee Rehabilitation Hospital	6 Franklin Plaza Philadelphia, PA	Think First program	5,000
07/10/2008	Main Street Community Development Corp.	PO Box 64 Phoenixville, PA	Operating support	37,500
03/17/2009	Main Street Community Development Corp.	PO Box 64 Phoenixville, PA	Elm Street project	15,000
09/30/2008	Maternal & Child Health Consortium	30 West Barnard Street West Chester, PA	Health insurance enrollment initiative and healthy start program	50,000
05/15/2009	Mental Health Association of Southeastern PA	1211 Chestnut Street Philadelphia, PA	Compeer Outreach program	10,000
05/15/2009	Mom's House	152 Church Street Phoenixville, PA	General operating support	5,000
09/30/2008	Nami PA - Chester County Chapter	PO Box 2732 West Chester, PA	Rental subsidy /mortgage assistance	5,000
06/30/2009	Nami PA - Chester County Chapter	PO Box 2732 West Chester, PA	Matching grant in support of rent subsidy / mortgage assistance program	5,000
09/30/2008	Open Hearth	101 North Main Street Spring City, PA	Operating support	40,000
09/30/2008	Orion Communities, Inc.	3034 Merlin Road Chester Springs, PA	Operating support and community	10,000
06/05/2009	Orion Communities, Inc.	3034 Merlin Road Chester Springs, PA	Matching grant in support of Community Account	10,000

Audit ... ANALYSIS OF GRANTS
July 1, 2008 - June 30, 2009

	Grantee		Grant Purpose	Amount of Grant(s) Paid
02/11/2009	Pennsylvania Association of Nonprofit Organizations	777 East Park Drive Harrisburg, PA	Technical assistance - Standards for Excellence workshop	1,000
09/30/2008	Pennsylvania Association of Nonprofit Organizations	777 East Park Drive Harrisburg, PA	Community Health Leadership Academy	5,685
09/30/2008	Phoenixville Area Children's Learning Center	310 Main Street Phoenixville, PA	Tuition subsidies	25,000
09/30/2008	Phoenixville Area Communities That Care / Phoenixville Area Positive Alternatives	181 Bridge Street Phoenixville, PA	Communities That Care operating support	20,000
05/15/2009	Phoenixville Area Community Services	257 Church Street Phoenixville, PA	Operating support; direct aid, and development program	50,000
11/21/2008	Phoenixville Area Positive Alternatives	181 Bridge Street Phoenixville, PA	Matching grant in support of operating expenses	10,000
01/31/2009	Phoenixville Area School District	1120 S. Gay Street Phoenixville, PA	Operation FOCUS	1,500
01/31/2009	Phoenixville Community Education Fdn.	1120 S. Gay Street Phoenixville, PA	Weller Health Education initiative	7,500
09/30/2008	Phoenixville Community Education Fdn.	1120 S. Gay Street Phoenixville, PA	Phoenixville cancer center oncology fellowship program	10,000
09/30/2008	Phoenixville Community Education Fdn.	1120 S. Gay Street Phoenixville, PA	Project Link	6,000
09/30/2008	Phoenixville Community Education Fdn.	1120 S. Gay Street Phoenixville, PA	TV Programming, Youth & Philanthropy, Mental Health Specialist, Fast Forward Connections, Activate Phoenixville	78,273
09/30/2008	Phoenixville Consortium to Prevent Homelessness / St. Mary's Franciscan Shelter	209 Emmett Street Phoenixville, PA	Phoenixville Consortium to Prevent Homelessness	10,000
07/10/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	100,000
07/23/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
08/20/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
09/05/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
09/23/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
10/15/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
11/07/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	40,000
12/01/2008	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
01/09/2009	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
01/26/2009	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	44,500

Audit ... ANALYSIS OF GRANTS
July 1, 2008 - June 30, 2009

	Grantee		Grant Purpose	Amount of Grant(s) Paid
04/02/2009	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
05/05/2009	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
06/11/2009	Phoenixville Healthcare Access Foundation	32 Gay Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
09/30/2008	Phoenixville Homes	PO Box 67 Spring City, PA	Programs coordinator support	20,000
01/31/2009	Phoenixville Police Athletic League	PO Box 221 Phoenixville, PA	Operating support	10,000
05/15/2009	Phoenixville Public Library	183 2nd Avenue Phoenixville, PA	Project Open Door	10,000
12/12/2008	Renaissance Academy	70 Renaissance Lane Phoenixville, PA	Matching grant in support of the life fitness program	5,000
09/30/2008	Ronald McDonald House	1901 Rockland Road Wilmington, DE	Adopt A Room project	5,000
09/30/2008	Schuylkill River Heritage Center	2 N. Main Street Phoenixville, PA	Operating support	7,500
01/31/2009	Southeastern PA Autism Resource Ctr.	1160 McDermott Drive West Chester, PA	Operating support	10,000
11/14/2008	Spring Ford Counseling Services Inc.		Matching grant in support of Counseling Services	5,000
05/15/2009	Spring Ford Education Foundation	199 Bechtel Road Collegeville, PA	SNAP Post Prom celebration	1,500
05/15/2009	Spring Ford Youth Athletic League	PO Box 835 Royersford, PA	Purchase of AEDs	2,727
09/30/2008	Sr. Adult Activity Center of Phoenixville	153 Church Street Phoenixville, PA	Operating support	10,000
05/15/2009	Sr. Adult Activity Center of Phoenixville	153 Church Street Phoenixville, PA	Information and assistance program	10,000
01/31/2009	Stepping Stone Education Center	400 Franklin Avenue Phoenixville, PA	Operating support	15,000
04/22/2009	Stepping Stone Education Center	400 Franklin Avenue Phoenixville, PA	Matching grant in support of operating expenses	5,000
09/30/2008	The Clinic	143 Church Street Phoenixville, PA	Operating support	225,000
09/30/2008	Transportation Management Association of Chester County	7 Great Valley Parkway Malvern, PA	Ride for Health initiative	53,200
09/30/2008	Tri County Community Network	260High Street Pottstown, PA	Youth leadership programs	3,490
09/30/2008	Triskeles Foundation	707 Eagleview Blvd. Exton, PA	Food for thought program	7,000
09/30/2008	Valley Forge Christian College	1491 Charlestown Rd. Phoenixville, PA	Purchase of AED pads	1,014
04/03/2009	Variety - The Children's Charity	PO Box 609 Worcester, PA	Matching grant in support of after school and summer program for children with disabilities	15,000
09/30/2008	Women's Resource Center	PO Box 596 Wayne, PA	Single mother's program	9,000
			Cash Basis Grants Total	2,172,427

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
HEALTH EDUCATION MINI-GRANT LIST
7/1/08-6/30/09

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Barkley Elementary School	320 Second Avenue Phoenixville, PA	Health education mini grant - support for health education program	None	6/26/09 #2699	200
Lower Pottsgrove Elementary School	1329 Blucher Road Pottstown, PA	Health education mini grant - support for health education program - family health & fitness nights	None	10/30/08 #2605	500
Owen J. Roberts School District	901 Ridge Road Pottstown, PA	Health education mini grant - support for health education program - TATU program - anti tobacco message	None	11/26/08 #2623	500
Phoenixville Area High School	1200 Gay Street Phoenixville, PA	Health education mini grant - support for health education program - book purchase re stress management	None	9/23/08 #2553	400
Phoenixville Area High School	1200 Gay Street Phoenixville, PA	Health education mini grant - support for health education program - TATU program - anti tobacco message	None	1/15/09 #2637	500
Phoenixville Area Middle School	1330 South Main Street Phoenixville, PA	Health education mini grant - support for health education program - behavioral health issues	None	3/24/09 #2666	500
Phoenixville Area Middle School	1330 South Main Street Phoenixville, PA	Health education mini grant - support for health education program - purchase of DVDs	None	6/24/09 #7448	215
					2,815

Audit ... Grant list mini 2008 2009

HB

Match Contributions
7/1/2008– 6/30/09

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
1/13/09	ACT Colonial Theater	Phoenixville	Richard Kunsch	100
5/29/09	ACT Colonial Theater	Phoenixville	Dan Baer	35
1/23/09	ACT Colonial Theatre	Phoenixville	Lou Beccaria	50
8/8/08	Aid for Friends	Philadelphia	Lou Beccaria	100
9/30/08	Aid for Friends	Philadelphia	Lou Beccaria	50
8/8/08	Allan C. Myers Mem. Scho. Fund	Worcester	James Reading	200
10/6/08	Barkley Elementary School	Phoenixville	Lou Beccaria	200
12/4/08	Big Brothers/Big Sisters	Philadelphia	Lou Beccaria	200
8/21/08	Brandywine Health Fdn.	Coatesville	Carol Poinier	200
3/23/09	Brandywine Health Foundation	Coatesville	Carol Poinier	250
4/15/09	Brandywine Health Foundation	Coatesville	Jim Reading	250
11/26/08	Camphill Village	Kimberton	Amy Barto	275
12/4/08	Camphill Village Kimberton Hills	Kimberton	Lou Beccaria	50
12/4/08	Chester County Community Foundation	West Chester	Lou Beccaria	100
12/22/08	Chester County Futures	Exton	Lou Beccaria	100
3/2/09	Chester County Futures	Exton	Lou Beccaria	50
5/20/09	Chester County Futures	Exton	Lou Beccaria	100
6/24/09	Chester County Futures	Exton	Lou Beccaria	50
10/20/08	Crime Victims Center	West Chester	Carol Poinier	75
12/9/08	Crime Victims Center	West Chester	Lou Beccaria	50
8/8/08	Cystic Fibrosis Foundation	c/o J. Reading Phoenixville	James Reading	500
12/4/08	Fellowship Health Resources	Lincoln, RI	Lynn Hartman	250
7/10/08	Freedom Valley YMCA	West Norriton	Richard Kunsch	1,000
10/22/08	Freedom Valley YMCA	West Norriton	James Reading	500
11/7/08	Freedom Valley YMCA	West Norriton	Robb Frees	1,750
1/15/09	Freedom Valley YMCA	West Norriton	Amy Barto	750
3/6/09	Freedom Valley YMCA	West Norriton	Richard Kunsch	1,300
3/23/09	Freedom Valley YMCA	West Norriton	Jim Reading	500
6/15/09	Freedom Valley YMCA	West Norriton	Dan Baer	250
12/4/08	Friends of Troop #78 BSA	Phoenixville	Dave Frees	100
12/22/08	Friendship Fire Dive Rescue Unit	Phoenixville	Amy Barto	300
3/2/09	Gateway Employment Resources	Limerick	Lou Beccaria	50
8/20/08	Good Samaritan Shelter	Phoenixville	Lou Beccaria	50
1/15/09	Good Samaritan Shelter	Phoenixville	Jim Reading	125
11/14/08	Great Valley Nature Center	Devault	Amy Barto	100
6/17/09	Great Valley Nature Center	Devault	Amy Barto	75
2/13/09	Green Valleys Association	Pottstown	Richard Kunsch	100
10/22/08	Historical Society of Phoenixville	Phoenixville	James Reading	50
10/31/08	Historical Society of Phoenixville	Phoenixville	Richard Kunsch	75
12/4/08	Historical Society of Phoenixville	Phoenixville	Lou Beccaria	50
12/4/08	Historical Society of Phoenixville	Phoenixville	Lynn Hartman	50
12/4/08	Historical Society of Phoenixville	Phoenixville	Dan Baer	25
12/4/08	Historical Society of Phoenixville	Phoenixville	Dave Frees	1,000
1/15/09	Historical Society of Phoenixville	Phoenixville	Richard Kunsch	100
5/20/09	Kelley Ann Dolan Memorial Fund	Ambler	Lou Beccaria	100
10/15/08	Kelly Ann Dolan Memorial Fund	Ambler	Lou Beccaria	50
10/20/08	Kelly Ann Dolan Memorial Fund	Ambler	Lou Beccaria	200
12/22/08	Legal Aid of SE PA	West Chester	Ron Brien	250
4/15/09	March of Dimes	King of Prussia	Carol Poinier	100
7/15/08	National Multiple Sclerosis Society	1 Reed Street Philadelphia	Lou Beccaria	300

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
7/31/08	National Multiple Sclerosis Society	1 Reed Street Philadelphia	Lou Beccaria	200
10/20/08	Neighborhood Hospice	West Chester	Carol Poinier	100
9/30/08	Open Hearth	Phoenixville	Lou Beccaria	50
12/22/08	Open Hearth	Phoenixville	Lou Beccaria	50
2/11/09	PASD Operation FOCUS	Phoenixville	Jim Reading	250
10/31/08	Phoenix Hose Hook & Ladder	Phoenixville	Lou Beccaria	100
11/14/08	Phoenix Hose Hook & Ladder	Phoenixville	Amy Barto	150
12/22/08	Phoenix Hose Hook & Ladder	Phoenixville	Amy Barto	300
3/10/09	Phoenix Hose, Hook & Ladder	Phoenixville	Amy Barto	50
1/15/09	Phoenixville Area Community Services	Phoenixville	Richard Kunsch	100
12/11/08	Phoenixville Area Positive Alternatives	Phoenixville	Lynn Hartman	100
6/30/09	Phoenixville Area Positive Alternatives	Phoenixville	Ken Winston	100
4/29/09	Phoenixville Area Senior Center	Phoenixville	Dave Frees	50
12/4/08	Phoenixville Area YMCA	West Norriton	Dave Frees	1,000
11/7/08	Phoenixville Community Ed. Fdn.	Phoenixville	Robb Frees	1,250
12/4/08	Phoenixville Healthcare Access Fdn.	Phoenixville	Dave Frees	250
12/22/08	Phoenixville Healthcare Access Fdn.	Phoenixville	Amy Barto	100
1/7/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Richard Kunsch	200
1/7/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Frank Cirone	100
1/7/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Lou Beccaria	100
10/8/08	Phoenixville Public Library	Phoenixville	Jim Reading	250
11/26/08	Phoenixville Public Library	Phoenixville	Amy Barto	180
12/22/08	Phoenixville Public Library	Phoenixville	Lou Beccaria	50
3/6/09	Phoenixville Public Library	Phoenixville	Richard Kunsch	100
4/7/09	Phoenixville Public Library	Phoenixville	Lou Beccaria	50
5/29/09	Phoenixville Public Library	Phoenixville	Dan Baer	25
6/17/09	Phoenixville Public Library	Phoenixville	Amy Barto	50
12/11/08	Salvation Army	Lehigh Valley	Lynn Hartman	35
1/15/09	Schuylkill Canal Associations	Oaks	Richard Kunsch	100
4/21/09	Schuylkill River Heritage Center	Phoenixville	Dan Baer	25
11/26/08	Soroptomist International	Phoenixville	Amy Barto	50
12/18/08	Stepping Stone	Phoenixville	Lynn Hartman	50
6/15/09	Torah Fund Bnai Jacob	Phoenixville	Dan Baer	90
				18,190

AB

FORM 990-PF

LEGAL FEES

STATEMENT

3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	34,397.	6,879.		27,518.
TO FORM 990-PF, PG 1, LN 16A	34,397.	6,879.		27,518.

FORM 990-PF

ACCOUNTING FEES

STATEMENT

4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	30,799.	6,160.		24,639.
TO FORM 990-PF, PG 1, LN 16B	30,799.	6,160.		24,639.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT

5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING	29,742.	5,948.		23,794.
PAYROLL SERVICE	1,337.	267.		1,070.
TO FORM 990-PF, PG 1, LN 16C	31,079.	6,215.		24,864.

FORM 990-PF

TAXES

STATEMENT

6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	22,458.	4,492.		17,966.
EXCISE TAXES	15,310.	15,310.		0.
REAL ESTATE TAXES	7,910.	1,582.		6,328.
TO FORM 990-PF, PG 1, LN 18	45,678.	21,384.		24,294.

FORM 990-PF

OTHER EXPENSES

STATEMENT

7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMMUNITY RELATIONS	16,760.	3,352.		13,408.
BANK FEES	120.	24.		96.
DUES AND SUBSCRIPTIONS	1,827.	365.		1,462.
INSURANCE	4,301.	860.		3,441.
MEMBERSHIP DUES	3,034.	607.		2,427.
SUPPLIES	11,728.	2,346.		9,382.
POSTAGE	4,208.	842.		3,366.
PROMOTIONAL	2,458.	492.		1,966.
STAFF DEVELOPMENT	2,029.	406.		1,623.
TELEPHONE	5,561.	1,112.		1,623.
TRUSTEE EDUCATION	9,724.	1,945.		7,779.
UTILITIES	5,743.	1,149.		4,594.
MISCELLANEOUS	14,281.	2,856.		11,425.
ASSET MANAGEMENT FEES	42,063.	42,063.		0.
WASH, WATER, SEWER	1,243.	249.		994.
SECURITY	240.	48.		192.
TO FORM 990-PF, PG 1, LN 23	125,320.	58,716.		63,778.

FOOTNOTES

STATEMENT

8

PART VII-A, LINE 11

NAME AND ADDRESS OF CONTROLLED ENTITY

CHES-MONT VALLEY VENTURES, INC.
824 MAIN STREET, SUITE 350
PHOENIXVILLE, PA 19460

EIN 23-2508198

THERE WERE NO TRANSFERS TO OR FROM THIS
CONTROLLED ENTITY DURING THE YEAR

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
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DESCRIPTION	AMOUNT
INCOME FROM SUBSIDIARY - UNREALIZED	173,923.
TOTAL TO FORM 990-PF, PART III, LINE 3	173,923.

FORM 990-PF	CORPORATE STOCK	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VANGUARD-FOUNDATION	22,525,636.	22,525,636.
VANGUARD-SECOND CENTURY	856,675.	856,675.
TOTAL TO FORM 990-PF, PART II, LINE 10B	23,382,311.	23,382,311.

FORM 990-PF	CORPORATE BONDS	STATEMENT	11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VANGUARD-FOUNDATION	12,092,553.	12,092,553.
VANGUARD-SECOND CENTURY	483,020.	483,020.
TOTAL TO FORM 990-PF, PART II, LINE 10C	12,575,573.	12,575,573.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	12
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE & FIXTURES	167,531.	101,140.	66,391.
LEASEHOLD IMPROVEMENTS	2,692.	269.	2,423.
TOTAL TO FM 990-PF, PART II, LN 14	170,223.	101,409.	68,814.

FORM 990-PF	OTHER ASSETS	STATEMENT 13
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN SUBSIDIARY	1,754,118.	1,928,041.	2,975,500.
TO FORM 990-PF, PART II, LINE 15	1,754,118.	1,928,041.	2,975,500.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 14
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LOUIS J. BECCARIA C/O PCHF	PRESIDENT 40.00	149,659.	13,902.	0.
AMY BARTO C/O PCHF	CHAIRMAN 0.00	0.	0.	0.
FRANK CIRONE C/O PCHF	VICE CHAIRMAN 0.00	0.	0.	0.
KAREN COLDWELL C/O PCHF	SECRETARY 0.00	0.	0.	0.
EUBANK TRAVIS-BEY C/O PCHF	TREASURER 0.00	0.	0.	0.
SEE ATTACHED LIST FOR DIRECTORS	0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		149,659.	13,902.	0.

Phoenixville Community Health Foundation
Form 990-PF

June 30, 2009

Statement 14

**BOARD OF DIRECTORS
2008 - 2009**

Amy Barto, Chairperson
Frank Cirone, Vice Chairperson
Karen Coldwell, Secretary
Eubank Travis-Bey, Treasurer

Daniel Baer, Director Emeritus
Augustus A. Boova, Director Emeritus
Ronald F. Brien, Esquire, Director Emeritus
Richard S. Downs, Director Emeritus
Timothy Durkin
David M. Frees, Jr., Director Emeritus
Robb S. Frees
R. John Giannone
Charles Henry
Christopher Holroyde, M.D.*
Samuel A. Jervis, Director Emeritus
Richard Kirkner**
Pastor Cynthia Krommes
Richard A. Kunsch, Sr., Director Emeritus
John Messina
Marian Moskowitz
Joseph Puleo
James Reading, Director Emeritus
Robert Ryan
Kenneth D. Winston

* Medical Staff Representative/Phoenixville Hospital – appointed on annual basis

** Borough of Phoenixville Representative – appointed on annual basis -

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 15

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CAROL POINIER
321 GAY STREET
PHOENIXVILLE, PA 19460

TELEPHONE NUMBER

610-917-9890

FORM AND CONTENT OF APPLICATIONS

THE FOUNDATION HAS DEVELOPED A GRANT REQUEST FORM WHICH MAY BE REQUESTED OR
DOWNLOADED FROM THE INTERNET.

ANY SUBMISSION DEADLINES

GRANT REQUESTS MUST BE RECEIVED AT LEAST SIX WEEKS PRIOR TO SCHEDULED GRANT
MAKING MEETINGS, WHICH GENERALLY ARE IN JAN, APRIL, JULY & SEPT.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION SERVES 501(C)(3) ORGANIZATIONS/PUBLIC CHARITIES WHICH
SUPPORT COMMUNITY OR PERSONAL HEALTH AND IS LIMITED TO 19 MUNICIPALITIES IN
THE GREATER PHOENIXVILLE AREA.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 16

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CHESTER COUNTY FUTURES 704 HAYROOD DRIVE, EXTON, PA	NONE PROGRAM SUPPORT		5,000.
HOPE SPRINGS EQUESTRIAN THERAPY P.O. BOX 156, CHESTER SPRINGS, PA	NONE RIDING SCHOLARSHIPS MATCHING GRANT		5,000.
LITTLE ANGELS DAY CARE P.O. BOX 172, PHOENIXVILLE, PA	NONE OPERATING, PROGRAM, EQUIPMENT, SUPPLIES		5,000.
MOM'S HOUSE 152 CHURCH STREET, PHOENIXVILLE, PA	NONE GENERAL OPERATING SUPPORT		5,000.
HEALTH CARE ACCESS 32 GAY STREET, PHOENIXVILLE, PA	NONE DENTAL, VISION & PRESCRIPTION ASSISTANCE PROGRAMS		50,000.
FAMILY SERVICE OF CHESTER COUNTY 310 N. MATLACK STRRET, WEST CHESTER, PA	NONE PIE GRANT		25,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3B			95,000.

Phoenixville Community Health Foundation
Schedule of Realized Gains(Losses)
Vanguard Foundation Account
FYE 06 30 09

Stock	Shares sold	Total price	Average Cost Basis	Total Gain or (loss)
Inflation Protected Securities Fund Admiral Shares	2,969.50	74,000.00	73,900.81	99.19
Inflation Protected Securities Fund Admiral Shares	1,249.50	31,000.00	31,000.00	-
Intermediate-Term Investment Grade Fund Admiral Shares	2,634.35	25,000.00	25,000.00	-
Short-Term Investment-Grade Fund Admiral Shares	5,619.05	59,000.00	59,464.58	(464.58)
Short-Term Investment-Grade Fund Admiral Shares	3,160.92	33,000.00	33,614.17	(614.17)
Total Bond Market Index Fund Institutional	9,190.81	92,000.00	92,517.02	(517.02)
Total Bond Market Index Fund Institutional	3,629.03	36,000.00	36,872.78	(872.78)
Total Bond Market Index Fund Institutional	866.98	8,626.43	8,626.43	-
Inflation Protected Securities Fund Admiral Shares	877.19	22,000.00	21,831.23	168.77
Intermediate-Term Investment Grade Fund Admiral Shares	5,844.85	55,000.00	56,281.37	(1,281.37)
Short-Term Investment-Grade Fund Admiral Shares	1,242.83	13,000.00	13,026.61	(26.61)
Total Bond Market Index Fund Institutional	9,960.16	100,000.00	100,959.52	(959.52)
Total Bond Market Index Fund Institutional	996.02	10,000.00	10,119.92	(119.92)
Inflation Protected Securities Fund Admiral Shares	3,192.80	78,000.00	78,778.02	(778.02)
Intermediate-Term Investment Grade Fund Admiral Shares	5,345.21	48,000.00	51,203.07	(3,203.07)
Short-Term Investment-Grade Fund Admiral Shares	7,480.32	76,000.00	79,037.60	(3,037.60)
Total Bond Market Index Fund Institutional	992.06	10,000.00	10,000.00	-
Total Bond Market Index Fund Institutional	29,979.88	298,000.00	304,207.80	(6,207.80)
Inflation Protected Securities Fund Admiral Shares	2,307.05	55,000.00	57,395.18	(2,395.18)
Inflation Protected Securities Fund Admiral Shares	169.56	4,000.00	4,218.42	(218.42)
Inflation Protected Securities Fund Admiral Shares	13,152.95	294,100.00	327,221.77	(33,121.77)
Intermediate-Term Investment Grade Fund Admiral Shares	9,286.52	82,000.00	90,243.96	(8,243.96)
Intermediate-Term Investment Grade Fund Admiral Shares	3,189.07	28,000.00	31,818.59	(3,818.59)
Intermediate-Term Investment Grade Fund Admiral Shares	6,855.79	58,000.00	68,402.98	(10,402.98)
Intermediate-Term Investment Grade Fund Admiral Shares	58,617.02	495,900.00	584,845.47	(88,945.47)
Short-Term Investment-Grade Fund Admiral Shares	8,051.69	81,000.00	85,044.59	(4,044.59)
Short-Term Investment-Grade Fund Admiral Shares	1,194.03	12,000.00	12,696.60	(696.60)
Short-Term Investment-Grade Fund Admiral Shares	44,964.68	445,600.00	478,127.45	(32,527.45)
Total Bond Market Index Fund Institutional	28,256.51	282,000.00	286,641.16	(4,641.16)
Total Bond Market Index Fund Institutional	5,622.49	56,000.00	57,123.94	(1,123.94)
Total Bond Market Index Fund Institutional	60,749.74	587,450.00	617,211.29	-29761.29
Total Bond Market Index Fund Institutional	9,643.23	93,250.00	97,974.21	-4724.21
Total Bond Market Index Fund Institutional	23247.156	224800	236188.78	-11388.78
Total Bond Market Index Fund Institutional	7238.883	70000	73546.33	-3546.33
Total Bond Market Index Fund Institutional	6990.693	67600	71024.74	-3424.74
Total Bond Market Index Fund Institutional	1236.581	11846.45	12563.54	-717.09
Intermediate-Term Investment Grade Fund Admiral Shares	2035.928	17000	17307.12	-307.12
Total Bond Market Index Fund Institutional	8486.708	83000	85161.32	-2161.32
Total Bond Market Index Fund Institutional	5035.247	50000	50689.04	-689.04
Inflation Protected Securities Fund Admiral Shares	1547.988	35000	38507.29	-3507.29
Intermediate-Term Investment Grade Fund Admiral Shares	5694.761	50000	52587.94	-2587.94
Intermediate-Term Investment Grade Fund Admiral Shares	7514.451	65000	74940.12	-9940.12
Short-Term Investment-Grade Fund Admiral Shares	5102.041	50000	52768.69	-2768.69
Total Bond Market Index Fund Institutional	987.167	10000	10000	0
Total Bond Market Index Fund Institutional	9871.668	100000	100356.36	-356.36
Total Bond Market Index Fund Institutional	9881.423	100000	100394.27	-394.27
Total Bond Market Index Fund Institutional	1018.875	10260.07	10168.37	91.7
REIT cost determined once per year		0	42,235.75	(42,235.75)
Intermediate-Term Investment Grade Fund Admiral Shares	5733.945	50000	55247.63	-5247.63
Inflation Protected Securities Fund Admiral Shares	222.717	5000	5458.45	-458.45
Short-Term Investment-Grade Fund Admiral Shares	1034.126	10000	10000	0
Total Bond Market Index Fund Institutional	3503.504	35000	35119.88	-119.88
Inflation Protected Securities Fund Admiral Shares	1475.548	35000	36706.32	-1706.32
Inflation Protected Securities Fund Admiral Shares	2107.926	50000	52437.61	-2437.61
Intermediate-Term Investment Grade Fund Admiral Shares	590.319	5000	5000	0
Total Bond Market Index Fund Institutional	991.08	10000	10000	0
Total Bond Market Index Fund Institutional	948.891	9574.31	9574.31	0

PRIMECAP Fund Admiral Shares	1024 38	50000	66115 64	-16115 64
PRIMECAP Fund Admiral Shares	40 975	2000	2644 61	-644 61
Total International Stock Index Fund	8820 882	98000	138784.23	-40784.23
Total International Stock Index Fund	8741.259	100000	137531.47	-37531.47
Total International Stock Index Fund	4009.623	50000	63085 8	-13085.8
Total International Stock Index Fund	4240.882	50000	66724 34	-16724.34
Total International Stock Index Fund	4255.319	50000	66951 49	-16951 49
TOTALS		5,197,007.26	5,675,227.98	(478,220 72)

Phoenixville Community Health Foundation
Schedule of Realized Gains(Losses)
Vanguard 2nd Century Account
FYE 06.30.09

Date	Stock	Shares sold	Total price	Average Cost Basis	Total Gain or (loss)
07.30.08	Total Bond Market Index Fund Institutional Share	31.05	308.92	315.10	(6.18)
10.13.08	Inflation Protected Securities Fund Admiral Shares	744.19	16,640.00	18,315.36	-1,675.36
10.13.08	Intermediate-Term Investment Grade Fund Admiral Shares	416.08	3,520.00	3,894.12	-374.12
10.13.08	Intermediate-Term Investment Grade Fund Admiral Shares	191.49	1,620.00	1,897.45	-277.45
10.13.08	Intermediate-Term Investment Grade Fund Admiral Shares	2,195.04	18,570.00	21,750.38	-3,180.38
10.13.08	Short-Term Investment-Grade Fund Admiral Shares	2,232.09	22,120.00	23,749.40	-1,629.40
10.13.08	Total Bond Market Index Fund Institutional	3,376.42	32,650.00	34,165.70	-1,515.70
10.13.08	Total Bond Market Index Fund Institutional	764.22	7,390.00	7,754.61	-364.61
10.13.08	Total Bond Market Index Fund Institutional	1,243.02	12,020.00	12,613.05	-593.05
10.13.08	Total Bond Market Index Fund Institutional	441.57	4,270.00	4,480.68	-210.68
10.13.08	Total Bond Market Index Fund Institutional	281.28	2,720.00	2,854.20	-134.20
10.13.08	Total Bond Market Index Fund Institutional	45.40	434.97	434.97	0.00
01.29.09	Total Bond Market Index Fund Institutional	38.28	385.44	385.44	0.00
04.29.09	Total Bond Market Index Fund Institutional	36.26	365.85	365.85	0.00
					0.00
					0.00
					0.00
	TOTALS		123,015.18	132,976.31	-9,961.13

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.***Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	PHOENIXVILLE COMMUNITY HEALTH FOUNDATION	23-2912035
	Number, street, and room or suite no. If a P.O. box, see instructions. 821 GAY STREET	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. PHOENIXVILLE, PA 19460	

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

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

LOUIS J. BECCARIA, PHD

- The books are in the care of ►
- 821 GAY STREET - PHOENIXVILLE, PA 19460**

Telephone No ► **610-917-9890**

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **FEBRUARY 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for.

► ☐ calendar year _____ or► ☒ tax year beginning **JUL 1, 2008**, and ending **JUN 30, 2009**.

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$ 12,339.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$ 33,410.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$ 0.

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)