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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 SEP 1, 2008, and ending AUG 31, 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 THE HERBERT JONES FOUNDATION		A Employer identification number 94-3124801
	C/O KEYBANK NATIONAL ASSOCIATION, TTEE		B Telephone number 425-709-4209
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 601 - 108TH AVENUE NE,, SUITE 260		C If exemption application is pending, check here <input type="checkbox"/>
	City or town, state, and ZIP code BELLEVUE, WA 98004-8606		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 10,368,513. (Part I, column (d) must be on cash basis.)		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>			
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)
Revenue	1 Contributions, gifts, grants, etc., received			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	165,093.	165,093.		STATEMENT 2
	4 Dividends and interest from securities	118,919.	118,919.		STATEMENT 3
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-40,913.			STATEMENT 1
	b Gross sales price for all assets on line 6a 2,150,693.				
	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					
12 Total. Add lines 1 through 11	243,099.	284,012.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 4	1,665.	832.		833.
	c Other professional fees STMT 5	55,354.	2,768.		52,586.
	17 Interest				
	18 Taxes STMT 6	8,020.	960.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	2,758.	1,089.		1,669.
	24 Total operating and administrative expenses. Add lines 13 through 23	67,797.	5,649.		55,088.
	25 Contributions, gifts, grants paid	493,754.			493,754.
26 Total expenses and disbursements. Add lines 24 and 25	561,551.	5,649.		548,842.	
27 Subtract line 26 from line 12	-318,452.				
a Excess of revenue over expenses and disbursements		278,363.			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			N/A		

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

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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				
	2	Savings and temporary cash investments		827,734.	648,031.	648,031.
	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 STMT 8		1,489,146.	1,739,146.	1,817,891.
	b	Investments - corporate stock STMT 9		3,616,598.	3,470,606.	4,227,934.
	c	Investments - corporate bonds STMT 10		1,206,138.	905,879.	947,015.
Liabilities	11	Investments - land, buildings, and equipment basis ▶				
		Less: accumulated depreciation ▶				
	12	Investments - mortgage loans				
	13	Investments - other STMT 11		2,821,494.	2,742,314.	2,590,960.
	14	Land, buildings, and equipment, basis ▶				
		Less: accumulated depreciation ▶				
	15	Other assets (describe ▶ STATEMENT 12)		0.	136,682.	136,682.
	16	Total assets (to be completed by all filers)		9,961,110.	9,642,658.	10,368,513.
	17	Accounts payable and accrued expenses				
	18	Grants payable				
Net Assets or Fund Balances	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)		0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		9,961,110.	9,642,658.	
28	Paid-in or capital surplus, or land, bldg, and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		0.	0.		
30	Total net assets or fund balances		9,961,110.	9,642,658.		
31	Total liabilities and net assets/fund balances		9,961,110.	9,642,658.		

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	9,961,110.
2	Enter amount from Part I, line 27a	2	-318,452.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	9,642,658.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,642,658.

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 SHORT-TERM CAPITAL LOSS -SEE ATTACHED DETAIL	P	VARIOUS	VARIOUS
b LONG-TERM CAPITAL GAIN - SEE ATTACHED DETAIL	P	VARIOUS	VARIOUS
c OTHER NON-CASH ADJUSTMENTS	P	VARIOUS	VARIOUS
d MISCELLANEOUS BASIS ADJUSTMENTS	P	VARIOUS	VARIOUS
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 54,827.		61,770.	-6,943.
b 2,095,866.		2,126,397.	-30,531.
c		2,475.	-2,475.
d		964.	-964.
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-6,943.
b			-30,531.
c			-2,475.
d			-964.
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	-40,913.
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	589,688.	12,192,245.	.048366
2006	612,364.	12,142,212.	.050433
2005	559,102.	11,521,419.	.048527
2004	535,155.	11,089,480.	.048258
2003	519,220.	10,960,606.	.047371

2 Total of line 1, column (d)	2	.242955
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	.048591
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	9,565,317.
5 Multiply line 4 by line 3	5	464,788.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,784.
7 Add lines 5 and 6	7	467,572.
8 Enter qualifying distributions from Part XII, line 4	8	548,842.

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	2,784.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	2,784.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,784.
6	Credits/Payments		
a	2008 estimated tax payments and 2007 overpayment credited to 2008	6a	9,160.
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	9,160.
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	6,376.
11	Enter the amount of line 10 to be Credited to 2009 estimated tax	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
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.		
3 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
4b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
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) WA		
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

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ HTTP://WWW.HBJFOUNDATION.COM	13	X	
14	The books are in care of ▶ KEYBANK NATIONAL ASSOCIATION Telephone no ▶ 425-709-4209 Located at ▶ 601 - 108TH AVE NE, SUITE 260, BELLEVUE, WA ZIP+4 ▶ 98004			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ <input type="checkbox"/> 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 <input type="checkbox"/>	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	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ _____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) 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	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4b	X

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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

X

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

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

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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 13		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

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

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

0

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0

4

2

3

0.

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	9,160,667.
b	Average of monthly cash balances	1b	549,566.
c	Fair market value of all other assets	1c	749.
d	Total (add lines 1a, b, and c)	1d	9,710,982.
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	9,710,982.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	145,665.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,565,317.
6	Minimum investment return. Enter 5% of line 5	6	478,266.

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	478,266.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	2,784.
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,784.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	475,482.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	475,482.
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	475,482.

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	548,842.
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	548,842.
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	2,784.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	546,058.

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

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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				475,482.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			245,665.	
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				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 548,842.				
a Applied to 2007, but not more than line 2a			245,665.	
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				303,177.
e Remaining amount distributed out of corpus	0.			
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	0.			
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				172,305.
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	0.			
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				

N/A

- (4) Gross investment income**

2008.05020 THE HERBERT JONES FOUNDATIO 10010 1

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SEE STATEMENT 15				
Total			► 3a	493,754.
b <i>Approved for future payment</i>				
NONE				
Total			► 3b	0

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

2008.05020 THE HERBERT JONES FOUNDATIO 10010 1

HERBERT B JONES FOUNDATION M/AG 40
Schedule D Detail of Short-term Capital Gains and Losses1 of 3

HERBERT B JONES FOUNDATION
EIN: 94-3124801
2008 FORM 990-PF
SCHEDULE D ATTACHMENT

HERBERT B JONES FOUNDATION M/AG 40
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
151 RATE CAPITAL GAINS (LOSSES)					
100000. WAL MART STORES INC NOTE	09/26/2003	10/01/2008	100,000.00	100,000.00	
861. GENERAL ELEC CO COM	07/07/2006	10/17/2008	17,370.40	28,637.13	-11,266.73
1639. GENERAL ELEC CO COM	02/27/1995	10/17/2008	33,066.31	14,949.05	18,117.26
600. MERRILL LYNCH & CO INC COM	05/17/1999	10/22/2008	11,103.11	23,565.00	-12,461.89
300. MERRILL LYNCH & CO INC COM	04/02/2003	10/22/2008	5,551.56	11,481.00	-5,929.44
200. MERRILL LYNCH & CO INC COM	09/26/2001	10/22/2008	3,701.04	7,590.00	-3,888.96
1500. STERICYCLE INC COM	12/24/2003	12/10/2008	80,357.39	15,595.52	64,761.86
200. AMGEN INC COM	08/12/2004	12/18/2008	47,285.73	44,118.24	3,167.49
500. GENENTECH INC COM	07/31/2006	12/18/2008	39,782.77	40,320.00	-537.23
1000. ISHARES S&P SMALLCAP 600	12/22/2003	12/18/2008	130,543.36	131,860.00	-1,316.64
700. WATERS CORP COM	05/14/2004	12/24/2008	25,314.87	30,635.15	-5,320.28
700. WATERS CORP COM	07/31/2006	12/23/2008	25,314.87	28,666.00	-3,351.13
2500. WATERS CORP COM	01/05/2004	12/24/2008	90,410.23	83,483.23	6,926.99
200. JOHNSON & JOHNSON COM	11/07/2001	01/08/2009	11,750.77	11,858.62	-107.84
500. JOHNSON & JOHNSON COM	01/03/2002	01/08/2009	29,376.23	29,250.00	126.23
500. JOHNSON & JOHNSON COM	02/05/2002	01/08/2009	29,376.24	27,775.00	1,601.24
900. JOHNSON & JOHNSON COM	02/12/2004	01/08/2009	52,878.48	49,185.00	3,693.48
50. STARBUCKS CORP COM	03/23/2004	01/12/2009	490.00	945.00	-455.00
1000. STARBUCKS CORP COM	01/15/2004	01/12/2009	29,329.83	50,385.00	-20,985.17
1150. NIKE INC COM CL B	03/20/2006	01/13/2009	57,855.71	49,245.88	8,609.83
2200. CREST DIAGNOSTICS INC COM	01/27/2005	01/13/2009	105,469.38	101,585.57	3,883.81
503. METLIFE INC COM	11/10/2006	01/14/2009	13,795.10	29,168.27	-15,373.17
497. METLIFE INC COM	11/10/2006	01/14/2009	13,630.54	28,816.05	-15,185.52
200. ISHARES S&P MIDCAP 400					
INDEX FD CLOSED-END FUND	08/31/2005	01/15/2009	9,741.94	15,020.00	-5,278.06
300. OCCIDENTAL PETE CORP DEL	01/03/2008	01/15/2009	15,777.33	24,021.51	-8,244.18
400. OCCIDENTAL PETE CORP DEL	01/15/2004	01/15/2009	21,036.44	8,844.00	12,192.44
900. STERICYCLE INC COM	12/24/2003	01/15/2009	43,333.52	21,357.21	21,976.31
400. ISHARES S&P MIDCAP 400					
INDEX FD CLOSED-END FUND	08/31/2005	02/06/2009	20,775.88	30,040.00	-9,264.12
100000. PFIZER INC NOTE	09/24/2003	03/02/2009	100,000.00	98,239.00	1,761.00
100. TRAVELERS COS INC COM	09/13/2006	04/30/2009	4,060.01	4,602.39	-542.38
Totals					

04/07/10

BCA196 9095 12/11/2009 40-104240809340

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STATEMENT 6

HERBERT B JONES FOUNDATION M/AG 40
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long Term Gain/Loss
1100 TRAVELERS COS INC COM	07/31/2006	04/30/2009	44,660.06	50,385.00	-5,708.94
1100 TRAVELERS COS INC COM	05/16/2006	04/20/2009	44,660.06	49,337.00	-4,676.94
50 AFLAC INC COM	11/03/2005	05/13/2009	1,532.82	2,381.00	-748.18
850 AFLAC INC COM	07/07/2006	05/13/2009	27,877.58	19,083.00	-11,205.42
2100 AFLAC INC COM	06/09/2004	05/13/2009	68,874.02	86,125.40	-17,251.38
1100 MICROSOFT CORP COM	07/20/2004	05/19/2009	22,472.42	31,020.00	-8,547.58
1000 STRICKLYCLE INC COM	12/24/2003	05/19/2009	52,071.86	23,730.35	28,341.51
500 OCCIDENTAL PETE CORP DEL	03/15/2004	05/26/2009	31,549.18	11,055.00	20,494.18
705 PEPSICO INC COM	08/05/2005	08/10/2009	40,327.85	38,394.30	1,933.55
400 PEBSICO INC COM	01/07/2006	08/10/2009	22,881.05	31,022.52	-1,858.53
115 PEPSCO INC COM	02/12/2004	08/10/2009	6,578.18	5,849.79	728.51
870 PROCTER & GAMBLE CO COM	11/06/2007	08/10/2009	45,291.03	61,314.29	-16,023.26
200 STRYKER CORP COM	08/26/2004	08/10/2009	8,167.81	9,225.82	-1,058.01
675 STRYKER CORP COM	11/03/2005	08/10/2009	27,566.36	29,119.50	-1,553.14
1600 Stryker Corp Com	12/24/2003	08/10/2009	65,342.48	66,053.60	-711.12
100000 AMERICAN GENERAL FINANCE CORP GEN TERM NT	09/24/2003	08/18/2009	87,501.00	101,020.00	-13,519.00
250000 PROCTER & GAMBLE INTL FINANCE FGN HT	02/13/2008	08/19/2009	250,000.00	250,232.50	-232.50
500 PRAXAIR INC COM	07/07/2006	08/28/2009	38,033.02	27,031.35	10,981.67
830 PROCTER & GAMBLE CO COM	11/06/2007	08/28/2009	43,841.46	58,495.25	-14,653.79
TOTAL 15% RATE CAPITAL GAINS (LOSSES)			2095866.00	2126397.00	-30,531.00
Total			2095866.00	2126397.00	-30,531.00

60979 1,600

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SHORT-TERM CAPITAL LOSS -SEE ATTACHED DETAIL					
	54,827.	61,770.	0.	0.	-6,943.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
LONG-TERM CAPITAL GAIN - SEE ATTACHED DETAIL					
	2,095,866.	2,126,397.	0.	0.	-30,531.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
OTHER NON-CASH ADJUSTMENTS					
	0.	2,475.	0.	0.	-2,475.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
MISCELLANEOUS BASIS ADJUSTMENTS	PURCHASED		VARIOUS	VARIOUS
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
0.	964.	0.	0.	-964.

CAPITAL GAINS DIVIDENDS FROM PART IV 0.

TOTAL TO FORM 990-PF, PART I, LINE 6A -40,913.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	AMOUNT
KEY BANK - CORPORATE INTEREST	97,165.
KEY BANK - FOREIGN INTEREST	6,385.
KEY BANK - US GOVT INTEREST	61,543.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	165,093.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
KEY BANK - FOREIGN DIVIDENDS	10,650.	0.	10,650.
KEY BANK - OTHER DIVIDENDS	97,220.	0.	97,220.
KEY BANK - USGI DIVIDENDS	11,049.	0.	11,049.
TOTAL TO FM 990-PF, PART I, LN 4	118,919.	0.	118,919.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAX PREPARATION FEE	1,665.	832.		833.	
TO FORM 990-PF, PG 1, LN 16B	1,665.	832.		833.	

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	
EVERTRUST FEES & COMMISSIONS	55,354.	2,768.		52,586.	
TO FORM 990-PF, PG 1, LN 16C	55,354.	2,768.		52,586.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAXES PAID	7,060.	0.		0.	
FOREIGN TAXES PAID	960.	960.		0.	
TO FORM 990-PF, PG 1, LN 18	8,020.	960.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MEMBERSHIP - ASSOCIATION OF SMALL FOUNDATIONS	495.	0.		495.	
WEBSITE MAINTENANCE	83.	0.		83.	
WASHINGTON STATE FILING FEES	25.	12.		13.	
FIDELITY BOND INSURANCE PREMIUM	1,200.	600.		600.	

ANNUAL BOARD MEETING	955.	477.	478.
TO FORM 990-PF, PG 1, LN 23	2,758.	1,089.	1,669.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. AGENCY BOND	X		956,730.	1,012,596.
US TREASURY BONDS/NOTES	X		782,416.	805,295.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,739,146.	1,817,891.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,739,146.	1,817,891.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
COMMON STOCK	3,470,606.	4,227,934.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,470,606.	4,227,934.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	905,879.	947,015.
TOTAL TO FORM 990-PF, PART II, LINE 10C	905,879.	947,015.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME INVESTMENTS	COST	791,535.	793,728.
EQUITY INVESTMENTS	COST	1,200,880.	1,297,665.
LONG TERM FLOATING BONDS	COST	399,450.	143,934.
FOREIGN BONDS	COST	350,449.	355,633.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,742,314.	2,590,960.

FORM 990-PF	OTHER ASSETS	STATEMENT 12
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SECURITY SALES PROCEEDS RECEIVABLE	0.	136,682.	136,682.
TO FORM 990-PF, PART II, LINE 15	0.	136,682.	136,682.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 13
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN	EXPENSE CONTRIB ACCOUNT
MICHAEL BAUER C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
JANET WOODS C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
BILL ERWERT C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
GARY KUJAR C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
TERRY SMITH C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
NANCY LEMKE C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
TOM CRHA C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
JUDY KLINKHAM C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

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

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

HERBERT B. JONES FOUNDATION C/O KEYBANK NATIONAL ASSOCIATION,
601 - 108TH AVENUE NE SUITE 260
BELLEVUE, WA 98004

TELEPHONE NUMBER

FORM AND CONTENT OF APPLICATIONS

SEE GRANT APPLICATION FORM ATTACHED.

ANY SUBMISSION DEADLINES

APRIL 1

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION PROMOTES ENTREPRENEURISM AND SMALL BUSINESS THROUGH THE
INITIAL AND TEMPORARY SUPPORT OF NEW BUSINESS PROGRAMS MANAGED BY POST-
SECONDARY EDUCATIONAL ENTITIES IN THE STATE OF WASHINGTON. SEE MISSION
STATEMENT ON GRANT APPLICATION.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

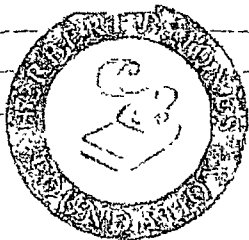
STATEMENT 15

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ENTERPRISE FOR EQUITY	NONE GREEN ENTERPRISE	EDUCATION	39,000.
GONZAGA UNIVERSITY	NONE BUSINESS PLAN COMPETITION	EDUCATION	20,000.
GONZAGA UNIVERSITY	NONE COLLABORATION WITH SPOKANE CC	EDUCATION	30,000.
HERITAGE COLLEGE	NONE INTERNSHIPS	EDUCATION	25,000.
N W SCHOOL FOR HEARING-IMPAIRED CHILDREN	NONE GENERAL FUND	EDUCATION	30,746.
N W SCHOOL FOR HEARING-IMPAIRED CHILDREN	NONE TEACHER PROGRAM	EDUCATION	36,000.
NORTHWEST ENTREPRENEUR NETWORK	NONE ENTREPRENEUR UNIVERSITY	EDUCATION	22,000.
SEATTLE PACIFIC UNIVERSITY	NONE MENTOR PROGRAMS	EDUCATION	9,008.
SEATTLE PACIFIC UNIVERSITY	NONE SOCIAL VENTURE COMPETITION	EDUCATION	20,000.
SEATTLE UNIVERSITY	NONE STUDENTS IN FREE ENTERPRISE	EDUCATION	30,000.

UNIVERSITY OF WASHINGTON	NONE BUSINESS PLAN COMPETITION	EDUCATION	25,000.
UNIVERSITY OF WASHINGTON LAW SCHOOL	NONE LAW SCHOOL CLINIC	EDUCATION	29,000.
SHORELINE COMMUNITY COLLEGE	NONE SMALL BUSINESS ACCELERATOR	EDUCATION	38,000.
STONE SOUP	NONE RURAL ENTREPRENEUR	EDUCATION	13,000.
WASHINGTON STATE UNIVERSITY	NONE CAMPUS ENTREPRENEUR	EDUCATION	27,000.
EVERETT COMMUNITY COLLEGE	NONE ENTREPRENEUR DEGREE	EDUCATION	35,000.
PACIFIC LUTHERAN UNIVERSITY	NONE IMPACT CASE COMPETITION	EDUCATION	20,000.
SPOKANE COMMUNITY COLLEGE	NONE ENTREPRENEUR COLLABORATION	EDUCATION	15,000.
UNIVERSITY OF WASHINGTON BOTHELL	NONE BUSINESS DEVELOPMENT CENTER	EDUCATION	15,000.
WASHINGTON CASH	NONE MICRO ENTERPRISE DEVELOPMENT	EDUCATION	15,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

493,754.



Home

Biography

Grant Guidelines

Grant History

Contact Us

HERBERT JONES FOUNDATION GRANT APPLICATION

MISSION STATEMENT

The Herbert B. Jones Foundation believes that entrepreneurship and small business are the backbone for the strength of our economic system.

We promote this belief through the initial and temporary support of new business programs managed by post-secondary educational entities in the state of Washington.

We desire the business community to be a vibrant and productive environment and the recipients of the Foundation's support to positively impact our greater business community.

GUIDELINES

- Grant requests will be for fiscal years, starting September 1
- Grant requests are due by the first Monday in April.
- Maximum 2 requests for consideration: a. A request can contain two or more inter-related, dependent segments, b. Each segment must show its need for other segments' accomplishment
- The minimum font size: 11
- Grants funds will not be provided for equipment, capital projects, gifts, endowments, or food costs
- Applicants must adhere strictly to format
- Please provide (5) stapled copies to:
Herbert B. Jones Foundation c/o Evertrust Asset Management, 505 5th Ave S, Ste. 170, Seattle, WA 98104
- The Foundation may make inquiries before, and will formally respond within 8 weeks

APPLICATION FORMAT

Name of Organization/Amount Requested/Time

Period Requested

Description/summary of program (Maximum 2
pages)

- Goals/objectives of program; i.e. how do these relate to HBJ mission statement?
- Results expected; i.e. how do the results satisfy HBJ goals?
- Target population; i.e. who benefits?
- Key staff and number of students to be involved
- Plan for measuring program results; i.e. how do you know you have succeeded?

**PROGRAM BUDGET (MAXIMUM 1
PAGE)**

- Detailed itemization of costs for each program and HBJ's funding portion
- Other funding resources; participant payments, grants, gifts, other
- Timetable of anticipated organizational expenditures

**APPENDIX (NOT REQUIRED IF
PREVIOUSLY PROVIDED)**

- Resume summary page (no more than ½ a page for each)
- History and mission of the organization
- Board and affiliations
- Overall Structure; description of sub-unit utilizing grant
- Evidence that your organization is a qualified tax-exempt organization capable of receiving grants from a private foundation

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