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OGDEN, UT

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	260,447	120,435	120,435
	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 (attach schedule) (see page 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	3,415,813	3,732,257	3,718,778
	c Investments—corporate bonds (attach schedule)	3,605,610	4,156,340	4,156,340
	11 Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶	787,243	776,600	1,450,000
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	2,500	2,500	2,500
Liabilities	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	8,071,613	8,788,132	
	17 Accounts payable and accrued expenses	54,504	4,250	
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)	99,005	99,005	
	23 Total liabilities (add lines 17 through 22)	153,509	103,255	
	Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	6,894,625	6,894,625	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	1,023,479	1,790,252	
	30 Total net assets or fund balances (see page 17 of the instructions)	7,918,104	8,684,877	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	8,071,613	8,788,132	

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	7,918,103
2 Enter amount from Part I, line 27a	2	489,747
3 Other increases not included in line 2 (itemize) ▶	3	277,027
4 Add lines 1, 2, and 3	4	8,684,877
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	8,684,877

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 COMMON STOCK				
b MUTUAL FUNDS- CAPITAL GAIN DISTRIBUTIONS		(SEE	ATTACHED	SCHEDULE)
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a			214,987	
b			62,039	
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
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) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8		3

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☐ No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007	761,958	7,265,700	.1049
2006	4,900,830	10,168,446	.4820
2005	1,227,161	10,731,545	.1144
2004	996,244	12,160,593	.0815
2003	843,276	13,594,877	.0603

2 Total of line 1, column (d)	2	.8431
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	.1686
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	8,479,271
5 Multiply line 4 by line 3	5	142,961
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	10,521
7 Add lines 5 and 6	7	153,482
8 Enter qualifying distributions from Part XII, line 4	8	5,126,991

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ 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 ☒ and enter 1% of Part I, line 27b	1	10,521	
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		
3 Add lines 1 and 2	3	10,521	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	10,521	
6 Credits/Payments:			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a		
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		
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	10,521	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2009 estimated tax	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		✓
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>		✓
1c Did the foundation file Form 1120-POL for this year?		✓
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (2) On foundation managers. ► \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		✓
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? <i>If "Yes," attach a conformed copy of the changes</i>		✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
4b 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? <i>If "Yes," attach the statement required by General Instruction T</i>		✓
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?	✓	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV.</i>	✓	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ►		
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? <i>If "No," attach explanation</i>	✓	
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 on page 27)? <i>If "Yes," complete Part XIV</i>		✓
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		✓

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 page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
Website address ▶				
14	The books are in care of ▶	Telephone no. ▶		
Located at ▶		ZIP+4 ▶		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			☐

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

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

	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? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	✓
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? ☐ Yes ☐ No If "Yes," list the years ▶ 20...., 20...., 20...., 20....		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20...., 20...., 20...., 20....		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☐ No		
b If "Yes," did it have excess business holdings in 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.)	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)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b**

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? **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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
(SEE ATTACHED SCHEDULE)				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

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

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

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

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

Expenses

1		
		
2		
		
	N/A	
3		
		
4		
		

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

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

Amount

1		
	NONE	
2		
		
All other program-related investments. See page 24 of the instructions.		
3		
		

Total. Add lines 1 through 3



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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	6,973,990
b	Average of monthly cash balances	1b	181,907
c	Fair market value of all other assets (see page 24 of the instructions)	1c	1,452,500
d	Total (add lines 1a, b, and c)	1d	8,608,397
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	8,608,397
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	129,126
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,479,271
6	Minimum investment return. Enter 5% of line 5	6	423,964

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

1	Minimum investment return from Part X, line 6	1	423,964
2a	Tax on investment income for 2008 from Part VI, line 5	2a	10,521
b	Income tax for 2008 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	10,521
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	413,443
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	413,443
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	413,443

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	5,126,991
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	5,126,991
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	10,521
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,116,470

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

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

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				413,443
2 Undistributed income, if any, as of the end of 2007:				
a Enter amount for 2007 only				
b Total for prior years: 20____, 20____, 20____				
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				
4 Qualifying distributions for 2008 from Part XII, line 4: \$ 5,126,991				
a Applied to 2007, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2008 distributable amount				5,126,991
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2008. (If an amount appears in column (d), the same amount must be shown in column (a).)	(4,713,548)			(4,713,548)
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	(4,713,548)			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
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) (see page 27 of the instructions)				
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a				
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				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

[illegible]

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 page 27 of 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 page 28 of the 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 ATTACHED SCHEDULE

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

SEE ATTACHED SCHEDULE

- c** Any submission deadlines:

REQUEST FOR CURRENT YEAR FUNDING SHOULD BE SENT AS EARLY AS POSSIBLE

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

SEE ATTACHED SCHEDULE

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Grants and Contributions Paid During the Year or Approved for Future Payment		Foundation status of recipient	Purpose of grant or contribution	Amount
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor			
Name and address (home or business)				
a <i>Paid during the year</i>				
SEE ATTACHED SCHEDULE				
Total				3a 4,884,633
b <i>Approved for future payment</i>				
Total				3b

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions)
1	Program service revenue:					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	1,134	
4	Dividends and interest from securities			14	684,792	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)				685,926	
13	Total. Add line 12, columns (b), (d), and (e)				685,926	685,926

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 28 of the instructions.)
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[illegible]

Part XVII 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) | ✓ |
| (2) | Other assets | 1a(2) | ✓ |
| b | Other transactions: | | |
| (1) | Sales of assets to a noncharitable exempt organization | 1b(1) | ✓ |
| (2) | Purchases of assets from a noncharitable exempt organization | 1b(2) | ✓ |
| (3) | Rental of facilities, equipment, or other assets | 1b(3) | ✓ |
| (4) | Reimbursement arrangements | 1b(4) | ✓ |
| (5) | Loans or loan guarantees | 1b(5) | ✓ |
| (6) | Performance of services or membership or fundraising solicitations | 1b(6) | ✓ |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | ✓ |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[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

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.

Joseph A. Vallone
Signature of officer or trustee

1/21/10
Date

Executive Director
Title

Sign Here

**Paid
Preparer's
Use Only**

Preparer's
signature

Bebo

Date _____

01-15-10

Check if self-employed ☒

Preparer's identifying
number (see **Signature** on
page 30 of the instructions)

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

BERT W. PALO & ASSOCIATES
2109 Brandies Ave. Cinnaminson, NJ. 08077-3512

EIN ► 22 3064824
Phone no (856) 303-8191

THE HAROLD B. & DOROTHY A. SNYDER FOUNDATION
FORM 990-PF
FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART I - LINE 4

Dividend Income - Common Stock	\$ 117,884
Dividend Income - Mutual Funds	566,908
Interest Income - TD Bank	941
Interest Income - Edward Jones	<u>193</u>
	<u>\$ 685,926</u>

PART I - LINE 18

TAXES

	COLUMN <u>(a)</u>	COLUMN <u>(b)</u>	COLUMN <u>(c)</u>
Provision of Federal Income Taxes	\$ <u>3,114</u>	\$ <u>-</u>	\$ <u>3,114</u>

PART I - LINE 23

Other Expenses

	COLUMN <u>(a)</u>	COLUMN <u>(b)</u>	COLUMN <u>(c)</u>
Dues & Subscriptions	\$ 495	\$ -	\$ 495
Insurance	7,543	-	7,543
Secretarial Expenses	3,975	-	3,975
Internet Site	8,450	-	8,450
Bank Charges	40	-	40
Architectural Costs	5,720	-	5,720
Utilities - Heat & Electric	1,060	-	1,060
Trustee Expenses	3,067	-	3,067
Dinner Expenses	1,252	-	1,252
Gratuity Event	225	-	225
Board Meeting Lunch	90	-	90
Conference Call - Board Meeting	173	-	173
Fee	98	-	98
Pension Fund	72,320	14,464	57,856
Postage	1,699	170	1,529
Vanguard Investment Fees	<u>13,438</u>	<u>13,438</u>	<u>-</u>
	<u>\$ 119,645</u>	<u>\$ 28,072</u>	<u>\$ 91,573</u>

PART I - LINE 25

Grants and Scholarships

	Award <u>Amount</u>
Josephine S. Place - Technology Grant	\$ 7,000
Seton Hall - Scholarship & Award	13,500
Kean University - Scholarship	12,000
Seton Hall - Scholarship	<u>10,000</u>
	\$ 42,500
Excess Carryover from 2006	\$ 4,437,232
Excess Carryover from 2007	<u>404,901</u>
	<u>4,842,133</u>
	<u>\$ 4,884,633</u>

THE HAROLD B. & DOROTHY A. SNYDER FOUNDATION
FORM 990-PF
FISCAL YEAR ENDED SEPTEMBER 30, 2009

<u>PART II - LINE 10a</u>	Beginning	End
<u>Investments - U.S. & State</u>	<u>of Year</u>	<u>of Year</u>
<u>Government Obligations</u>		
U.S. Government Bonds	\$ <u>929,580</u>	\$ <u>-</u>

<u>PART II - LINE 10c</u>	
<u>Investments - Corporate Bonds</u>	
Vanguard Brokerage Service	\$ <u>4,156,340</u>

<u>PART II - LINE 13</u>	Beginning	End
<u>Investments - Other</u>	<u>of Year</u>	<u>of Year</u>
Investments in Amwell Valley Co.	\$ 2,500	\$ 2,500

<u>PART II - LINE 14</u>	Appraised		Current Year	Accumulated
<u>Land, Building & Equipment</u>	<u>Value</u>	<u>Rate</u>	<u>Depreciation</u>	<u>Depreciation</u>
Land	\$ 776,600		\$ -	\$ -
Building	<u>673,400</u>	5.26%	<u>10,643</u>	<u>673,400</u>
	<u>\$1,450,000</u>		\$ <u>10,643</u>	\$ <u>673,400</u>

<u>PART II - LINE 22</u>	Beginning	End
<u>Other Liabilities</u>	<u>of Year</u>	<u>of Year</u>
Security Deposits	\$ <u>99,004</u>	\$ <u>99,004</u>

PART III- Analysis of Changes
in Net Assets or Fund Balances
LINE 3 - Other Increases

Gain (Loss) on Sale of Common Stock	\$ 214,987
Mutual Funds - Capital Gain Distributions	<u>62,039</u>
	\$ <u>277,026</u>

THE HAROLD B. & DOROTHY A. SNYDER FOUNDATION

FORM 990-PF

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART II - BALANCE SHEET

LINE 10 b - Corporate Stocks

<u># of Shares</u>	<u>Description</u>	<u>Book Value</u>	<u>Market Value</u>
9,866.089	Capital Income Builder Fund	\$ 457,392	\$ 457,392
16,072.361	Capital World Growth & Income Fund	522,191	522,191
2,142.732	Europacific Growth	79,667	69,489
15,730.147	Growth Fund of America	403,793	400,490
4,587.806	JPMorgan High Yield Fund	34,317	34,317
21,499.934	JPMorgan Core Bond Fund	239,908	239,908
745.450	Dodge & Cox Stock Fund	68,634	68,634
5,262.350	Dodge & Cox Income Fund	68,634	68,634
3,896.683	Mutual Global Discovery Fund	102,950	102,950
6,308.233	Lord Abbett Total Return Fund	68,634	68,634
1,132.044	Capital Income Builder Fund	53,500	53,500
2,370.762	Federated Kaufmann Small Cap	45,756	45,756
2,553.332	JPMorgan Mid Cap Value Fund	45,756	45,756
45,686.950	JPMorgan Federal Money Market Fund	45,687	45,687
2,966.015	Loomis Sayles Invst Grade BD Y	34,317	34,317
3,213.182	Hartford Capital Appreciation	91,511	91,511
6,728.782	Allianz NFJ Large Cap Value	80,073	80,073
2,678.381	Van Kampen America value Fund	57,023	57,023
1,374.042	Franklin Balance Sheet Investment Fund	57,023	57,023
4,374.346	Franklin Mutual Shares Fund	79,832	79,832
2,887.227	Delaware Select Growth Fund	68,427	68,427
1,160.178	DWS Small Cap Value Fund	34,214	34,214
8,558.760	Eaton Vance Income Fund Boston	45,618	45,618
8,249.220	Goldman Sacks Commodity	45,618	45,618
8,613.978	MFS Value Fund	171,309	171,309
1,981.102	Harbor International Fd Instl	102,641	102,641
9,996.567	Manning & Napier World Opprt. Series	80,073	80,073
3,431.679	T Rowe Price Intl Bond Fund	34,317	34,317
9,831.505	T Rowe Price New Income Fund	91,236	91,236
2,646.150	T Rowe Price Blue Chip Growth	80,073	80,073
2,775.673	Pioneer Fund CLY	91,236	91,236
4,534.640	T Rowe Price International Bond Fund	45,618	45,618
10,126.123	Pioneer Bond Fund CL Y	91,236	91,236
3,364.173	Oppenheimer Intrnl Growth Fund CL Y	79,832	79,832
2,534.344	Oppenheimer Real Estate Fund CLY	34,214	34,214
		<u>\$ 3,732,257</u>	<u>\$ 3,718,778</u>

THE HAROLD B. & DOROTHY A. SNYDER FOUNDATION

FORM 990-PF

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART VIII - Officers, Directors, Trustees and Foundation Managers

Names & Addresses	Title & Avg. Hrs. Paid pr/week Devoted to Position	Contribution To Employee Benefit Program	Expense Amt. & Other Allowance	Compensation
1. Ethelyn Allison P.O. Box 671 Moorestown, NJ.08057	Trustee 1 hour	\$ None	\$ None	\$ 2,400
2. Lillian Palumbo P.O. Box 671 Moorestown, NJ.08057	Trustee 2 hour	None	None	2,000
3. Phyllis J. Snyder P.O. Box 671 Moorestown, NJ.08057	Trustee 2 hour	None	None	2,000
4. J. Vernon. Whittenburg P.O. Box 671 Moorestown, NJ.08057	Trustee 2 hour	None	None	2,800
5. Joseph A. Vallone III P.O. Box 671 Moorestown, NJ.08057	Trustee Exec. Director 35 hours	None	None	105,000
6. Melvin Cook P.O. Box 671 Moorestown, NJ.08057	Trustee 1 hour	None	None	1,500
7. Arlene S. Cortese P.O. Box 671 Moorestown, NJ.08057	Trustee 1 hour	None	None	1,500
8. Laura Stammel P.O. Box 671 Moorestown, NJ.08057	Trustee 1 hour	None	None	1,500
9. Shannon Cortese P.O. Box 671 Moorestown, NJ. 08057	Trustee 1 hour	None	None	1,500

TOTAL COMPENSATION

\$ 120,200

THE HAROLD B. & DOROTHY A. SNYDER FOUNDATION
FORM 990-PF
FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART X - MINIMUM INVESTMENT RETURN

LINE 1: Fair Market value of assets not used(or held for use) directly in carrying out charitable, ect., purposes:

Date	Mutual Funds	Common Stocks	Total
Oct. 08	\$ 3,194,290	\$ 5,103,452	\$ 8,297,742
Nov. 08	3,155,791	5,112,523	8,268,314
Dec. 08	3,264,505	2,926,126	6,190,631
Jan. 09	3,193,612	2,927,037	6,120,649
Feb. 09	3,144,604	2,931,282	6,075,886
Mar. 09	3,197,074	3,158,165	6,355,239
Apr. 09	3,237,924	3,159,354	6,397,278
May 09	3,317,611	3,164,057	6,481,668
Jun. 09	3,318,693	3,902,207	7,220,900
Jul. 09	3,388,028	3,907,971	7,295,999
Aug. 09	3,423,092	3,907,695	7,330,787
Sept. 09	3,732,257	3,920,528	7,652,785
	\$ 39,567,481	\$ 44,120,397	\$ 83,687,878
	Average Monthly Balance: \$ <u>6,973,990</u>		

PART X - MINIMUM INVESTMENT RETURN

LINE 1b - Average monthly cash balance:

Date	Edward Jones	Commerce Checking	Commerce Savings	Business Ultra MM	Total
Oct. 08	\$ 55,597	\$ 31,972	\$ 10,067	\$ 122,951	\$ 219,887
Nov. 08	55,653	25,776	23,801	122,470	227,700
Dec. 08	55,701	11,959	37,549	-	105,209
Jan. 09	55,716	133,699	51,283	-	240,698
Feb. 09	55,728	98,366	65,017	-	219,111
Mar. 09	55,729	62,567	78,786	-	197,082
Apr. 09	55,729	23,572	92,520	-	171,821
May 09	55,730	11,638	106,254	-	173,622
Jun. 09	55,731	9,111	120,037	-	184,879
Jul. 09	55,731	54,238	33,777	-	143,746
Aug. 09	55,733	85,823	2,511	-	144,067
Sep. 09	2,004	136,802	16,251	-	155,057
	\$ 614,782	\$ 685,523	\$ 637,853	\$ 244,721	\$ 2,182,879
	Average Monthly Balance:\$ <u>181,907</u>				

PART X - LINE 1c - Fair Market Value of all other Assets

Investments - Other	\$ 2,500
Land, Building & Equipment	<u>1,450,000</u>
	\$ <u>1,452,500</u>