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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 OCT 1, 2008, and ending SEP 30, 2009

G Check all that apply: ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

STOCKTON RUSH BARTOL FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

230 SOUTH BROAD STREET

Room/suite

1003

City or town, state, and ZIP code

PHILADELPHIA, PA 19102

A Employer identification number

23-2318470

B Telephone number

215-545-4037

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test,
check here and attach computation ☐E If private foundation status was terminated
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

\$ 4,921,579. (Part I, column (d) must be on cash basis)

J Accounting method: ☐ Cash ☒ Accrual☐ Other (specify)

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	42,500.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	137,475.	137,247.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	<951,069.>			STATEMENT 1
b	Gross sales price for all assets on line 6a	5,304,517.			
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	<49,488.>	<55,304.>		STATEMENT 3
12	Total. Add lines 1 through 11	<820,582.>	81,943.		
13	Compensation of officers, directors, trustees, etc	72,100.	0.		72,100.
14	Other employee salaries and wages	25,021.	0.		25,021.
15	Pension plans, employee benefits	6,596.	0.		6,596.
16a	Legal fees				
b	Accounting fees STMT 4	10,713.	0.		10,713.
c	Other professional fees STMT 5	27,859.	27,859.		0.
17	Interest				
18	Taxes STMT 6	10,465.	2,271.		7,674.
19	Depreciation and depletion	938.	0.		
20	Occupancy	20,436.	0.		20,436.
21	Travel, conferences, and meetings	2,550.	0.		2,550.
22	Printing and publications	399.	0.		399.
23	Other expenses STMT 7	11,152.	0.		11,123.
24	Total operating and administrative expenses. Add lines 13 through 23	188,229.	30,130.		156,612.
25	Contributions, gifts, grants paid	130,000.			130,000.
26	Total expenses and disbursements. Add lines 24 and 25	318,229.	30,130.		286,612.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<1,138,811.>			
b	Net investment income (if negative, enter -0-)		51,813.		
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		26,658.	30,090.	30,090.
	2	Savings and temporary cash investments		337,158.	283,663.	283,663.
	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		8,755.	9,959.	9,959.
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock	STMT 8	3,032,999.	2,377,109.	2,377,109.
	c	Investments - corporate bonds	STMT 9	903,262.	140,640.	140,640.
	Liabilities	11	Investments - land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other	STMT 10	799,828.	2,069,912.	2,069,912.
14		Land, buildings, and equipment: basis ▶	24,363.			
		Less: accumulated depreciation	STMT 11 ▶	23,257.	2,044.	1,106.
15		Other assets (describe ▶)	STATEMENT 12)	6,549.	9,100.	9,100.
16		Total assets (to be completed by all filers)		5,117,253.	4,921,579.	4,921,579.
17		Accounts payable and accrued expenses		10,030.	13,626.	
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)		10,030.	13,626.	
	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted		5,107,223.	4,899,882.	
	25	Temporarily restricted		0.	8,071.	
	26	Permanently restricted				
	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		5,107,223.	4,907,953.		
31	Total liabilities and net assets/fund balances		5,117,253.	4,921,579.		

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	5,107,223.
2	Enter amount from Part I, line 27a	2	<1,138,811.>
3	Other increases not included in line 2 (itemize) ▶ CURRENT YEAR UNREALIZED GAINS	3	939,541.
4	Add lines 1, 2, and 3	4	4,907,953.
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	4,907,953.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENT			
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 5,304,517.		6,255,586.	<951,069.>
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			<951,069.>
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 <951,069.>
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	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		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	320,048.	5,967,936.	.053628
2006	339,081.	6,347,490.	.053420
2005	326,594.	6,061,601.	.053879
2004	323,713.	5,770,886.	.056094
2003	334,119.	5,615,183.	.059503

2 Total of line 1, column (d)	2	.276524
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	.055305
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	4,402,983.
5 Multiply line 4 by line 3	5	243,507.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	518.
7 Add lines 5 and 6	7	244,025.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	286,612.

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)		1	518.
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		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	518.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	518.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
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	5,071.	
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	5,071.	
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	4,553.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax <input checked="" type="checkbox"/> 4,553. Refunded <input type="checkbox"/>	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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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) <input checked="" type="checkbox"/> PA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.BARTOL.ORG	13	X	
14	The books are in care of STOCKTON RUSH BARTOL FOUNDATION Telephone no. 215-545-4037 Located at 230 SOUTH BROAD STREET SUITE 1003, PHILADELPHIA, PA 19102 ZIP+4 19102			
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

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

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

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

☐ 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?

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?

N/A

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

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
BETH FELDMAN BRANDT C/O STOCKTON RUSH BARTOL FOUNDATION, PHILADELPHIA, PA 19102 SEE ATTACHED LIST	EXECUTIVE DIRECTOR	72,100.	2,163.	0.
	40.00			
	0.00	0.	0.	0.

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

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

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

0

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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	3,779,394.
b	Average of monthly cash balances	1b	671,590.
c	Fair market value of all other assets	1c	19,050.
d	Total (add lines 1a, b, and c)	1d	4,470,034.
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	4,470,034.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	67,051.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,402,983.
6	Minimum investment return. Enter 5% of line 5	6	220,149.

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	220,149.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	518.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	518.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	219,631.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	219,631.
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	219,631.

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	286,612.
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	286,612.
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	518.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	286,094.

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				219,631.
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	56,690.			
b From 2004	41,411.			
c From 2005	31,563.			
d From 2006	33,987.			
e From 2007	28,432.			
f Total of lines 3a through e	192,083.			
4 Qualifying distributions for 2008 from Part XII, line 4: ► \$	286,612.			
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				219,631.
e Remaining amount distributed out of corpus	66,981.			
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	259,064.			
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	56,690.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	202,374.			
10 Analysis of line 9:				
a Excess from 2004	41,411.			
b Excess from 2005	31,563.			
c Excess from 2006	33,987.			
d Excess from 2007	28,432.			
e Excess from 2008	66,981.			

N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

2008.05030 STOCKTON RUSH BARTOL FOUNDA STOCKTO1

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE ATTACHED SCHEDULE	N/A	PUBLIC CHARITIES	SEE ATTACHED	130,000.
Total				130,000.
b Approved for future payment				
NONE				
Total				0.

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2008

Name of the organization

Employer identification number

STOCKTON RUSH BARTOL FOUNDATION

23-2318470

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

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

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

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

☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

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

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

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

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

Name of organization

Employer identification number

STOCKTON RUSH BARTOL FOUNDATION

23-2318470

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	UNIVERSITY OF THE ARTS 1608 WALNUT STREET, 18TH FLOOR PHILADELPHIA, PA 19103	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	PHOEBE W HAAS CHARITABLE TRUST B TWO LOGAN SQ; 100 N 18TH ST; STE 1110 PHILADELPHIA, PA 19103	\$ 25,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

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	SMITH BARNEY #1884	P	VARIOUS	VARIOUS
b	SMITH BARNEY #1884	P	VARIOUS	VARIOUS
c	SMITH BARNEY #487	P	VARIOUS	VARIOUS
d	SMITH BARNEY #487	P	VARIOUS	VARIOUS
e	SMITH BARNEY #758	P	VARIOUS	VARIOUS
f	SMITH BARNEY #758	P	VARIOUS	VARIOUS
g	SMITH BARNEY #482	P	VARIOUS	VARIOUS
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,719,164.		2,924,622.	<205,458.>
b 1,402,893.		1,645,119.	<242,226.>
c 810,166.		1,187,609.	<377,443.>
d 99,109.		132,609.	<33,500.>
e 139,295.		220,033.	<80,738.>
f 24,992.		39,934.	<14,942.>
g 108,898.		105,660.	3,238.
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<205,458.>
b			<242,226.>
c			<377,443.>
d			<33,500.>
e			<80,738.>
f			<14,942.>
g			3,238.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 }

2

<951,069.>

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

2008 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	FURNITURE & EQUIPMENT	VARIES	SL	.000	16	24,363.			24,363.	22,319.		938.
	* TOTAL 990-PF PG 1					24,363.		0.	24,363.	22,319.	0.	938.
	DEPR											

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
SMITH BARNEY #1884					
	2,719,164.	2,924,622.	0.	0.	<205,458.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SMITH BARNEY #1884					
	1,402,893.	1,645,119.	0.	0.	<242,226.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SMITH BARNEY #487					
	810,166.	1,187,609.	0.	0.	<377,443.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SMITH BARNEY #487	99,109.	132,609.	0.	0.	<33,500.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SMITH BARNEY #758	139,295.	220,033.	0.	0.	<80,738.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SMITH BARNEY #758	24,992.	39,934.	0.	0.	<14,942.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SMITH BARNEY #482	108,898.	105,660.	0.	0.	3,238.

CAPITAL GAINS DIVIDENDS FROM PART IV

0.

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

<951,069.>

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	2
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SALOMON SMITH BARNEY - DIVIDENDS	101,901.	0.	101,901.
SALOMON SMITH BARNEY - INTEREST	35,346.	0.	35,346.
TAX-EXEMPT INTEREST FROM PARTNERSHIP INVESTMENT	228.	0.	228.
TOTAL TO FM 990-PF, PART I, LN 4	137,475.	0.	137,475.

FORM 990-PF	OTHER INCOME	STATEMENT	3
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INCOME	5,721.		
NET PARTNERSHIP INCOME	<55,209.>		
TOTAL TO FORM 990-PF, PART I, LINE 11	<49,488.>		

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDIT/REVIEW FEES	7,150.	0.		7,150.
BOOKKEEPING	3,563.	0.		3,563.
TO FORM 990-PF, PG 1, LN 16B	10,713.	0.		10,713.

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	
INVESTMENT, BANKING & CUSTODIAL FEES	27,859.	27,859.		0.	
TO FORM 990-PF, PG 1, LN 16C	27,859.	27,859.		0.	

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	7,674.	0.		7,674.	
EXCISE TAX	518.	0.		0.	
FOREIGN TAXES	2,271.	2,271.		0.	
FEDERAL WITHHOLDING FROM PARTNERSHIP INVESTMENT	2.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	10,465.	2,271.		7,674.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
DUES & SUBSCRIPTIONS	1,165.	0.		1,165.	
INSURANCE	1,235.	0.		1,235.	
OFFICE EXPENSE	1,502.	0.		1,502.	
POSTAGE	209.	0.		209.	
TELEPHONE	2,080.	0.		2,080.	
PAYROLL SERVICE	1,388.	0.		1,388.	
ENTERTAINMENT	670.	0.		670.	
CONSULTING	945.	0.		945.	
NONDEDUCTIBLE EXPENSES FROM PARTNERSHIP INVESTMENT	29.	0.		0.	
WORKSHOPS	1,929.	0.		1,929.	
TO FORM 990-PF, PG 1, LN 23	11,152.	0.		11,123.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
COMMON STOCKS HELD AT SMITH BARNEY	2,377,109.	2,377,109.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,377,109.	2,377,109.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
GOVERNMENT AND CORPORATE BONDS HELD AT SMITH BARNEY	140,640.	140,640.
TOTAL TO FORM 990-PF, PART II, LINE 10C	140,640.	140,640.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PARTNERSHIP INTEREST IN IVY MULTI STRATEGY HEDGE FUND LLC	FMV	0.	0.
EXCHANGE TRADED & CLOSED END FUNDS	FMV	581,629.	581,629.
MORTGAGE & ASSET BACKED SECURITIES	FMV	420,606.	420,606.
MUTUAL FUNDS	FMV	1,067,677.	1,067,677.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,069,912.	2,069,912.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	11
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE & EQUIPMENT	24,363.	23,257.	1,106.
TOTAL TO FM 990-PF, PART II, LN 14	24,363.	23,257.	1,106.

FORM 990-PF	OTHER ASSETS		STATEMENT 12
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DEPOSITS	6,035.	6,035.	6,035.
ACCRUED INTEREST	514.	3,065.	3,065.
TO FORM 990-PF, PART II, LINE 15	6,549.	9,100.	9,100.



Stockton Rush Bartol Foundation

Board of Directors

Linda Reichert, Chair

Elizabeth Sayre, Vice-Chair

Helen Shannon, Secretary

Ann Diebold, Treasurer

Suzanne Cunningham

Joan Huckstep

Evelyne Laurent-Perrault

Wendy Osterweil

Kathryn Petersen

Anula Shetty

Elizabeth Shevlin

Karol M. Wasylyshyn

Angela Watson

2009 Bartol Foundation Auditor's Report

Organization	Address	City	Zip	Check #	Check date	Description	2009 Grant
T Al-Bustan Seeds of Culture							
	526 S. 46th St.	Philadelphia	19143	4811	6/29/09	General operating support	5000
C Art Sanctuary							
	1801 West Diamond St.	Philadelphia	19121-1590	4812	6/29/09	General operating support and Bartol Award	10000 40-11
C Art-Reach							
	1819 JFK Blvd.	Philadelphia	19103	4813	6/29/09	Cultural accessibility programs in Philadelphia	5000 40-12
T Asian Arts Initiative							
	1219-1223 Vine St.	Philadelphia	19107	4814	6/29/09	General operating support	5000
C Bowerbird							
	2226 Locust St.	Philadelphia	19103	4815	6/29/09	Open Sound monthly music workshops	5000
C Clay Studio							
	139 North 2nd Street	Philadelphia	19106	4863	9/21/09	Claymobile workshops in Philadelphia.	5000 40-14
Cliveden of the National Trust							
	6401 Germantown Avenue	Philadelphia	19144	4817	6/29/09	After school poetry workshop	5000
Commonwealth Youthchoirs							
	35 West Chelton Ave	Philadelphia	19144	4818	6/29/09	Choral music education programs.	5000
T Community Education Center							
	3500 Lancaster Avenue	Philadelphia	19104-4916	4819	6/29/09	General operating support	5000
InterAct Theatre Company							
	2030 Sansom Street	Philadelphia	19103	4820	6/29/09	Educational outreach residencies	5000

Thursday, October 15, 2009

Page 1 of 3

40-10

PBC
Jm 11/19/09

<i>Organization</i>	<i>Address</i>	<i>City</i>	<i>Zip</i>	<i>Check #</i>	<i>Check date</i>	<i>Description</i>	<i>2009 Grant</i>
<i>Intercultural Family Services</i>							
	4225 Chestnut St	Philadelphia	19104	4821	6/29/09	Music and Mentorship Program	5000
C <i>International Ballet Exchange</i>							
	38 E. School House Lane	Philadelphia	19144	4822	6/29/09	Ballet residency in three Phila. public schools	5000 40-15
T <i>Lantern Theater Company</i>							
	PO Box 53428	Philadelphia	19105-3428	4823	6/29/09	In-school theatre residency	5000
<i>Leah Stein Dance Company</i>							
	130 E. Cliveden St.	Philadelphia	19119	4824	6/29/09	Site specific dance with education program	5000
T <i>OASIS</i>							
	4700 Wissahickon Ave., Ste 126	Philadelphia	19144	4854	9/1/09	Artist in residence project	5000
<i>Pasion y Arte</i>							
	6411 Overbrook Ave	Philadelphia	19151	4825	6/29/09	Juerga Flamenco improvisational sessions	5000
T <i>Peregrine</i>							
	1400 North American St., Suite 412	Philadelphia	19122	4840	7/9/09	Enterprise Platform Management Service Subsid	5000
T <i>Philadelphia Dance Projects</i>							
	1427 Spruce St	Philadelphia	19102	4858	9/9/09	Dance TAG	1500 a
T <i>Philadelphia Folklore Project</i>							
	735 S. 50th St.	Philadelphia	19143	4826	6/29/09	Folk arts education programs	5000
T <i>Philadelphia Young Playwrights</i>							
	7 Ben Franklin Parkway, 2nd floor	Philadelphia	19103-1208	4827	6/29/09	Playwriting program in Philadelphia schools.	5000
T <i>Print Center</i>							
	1614 Latimer Street	Philadelphia	19103	4828	6/29/09	Artists-in-Schools Program	5000

Organization	Address	City	Zip	Check #	Check date	Description	2009 Grant
└ Scribe Video Center	4212 Chestnut St. 3rd floor	Philadelphia	19104	4829	6/29/09	Documentary History Project for Youth	5000
└ Southwest Community Enrichment Center	1341 South 46th Street	Philadelphia	19143	4830	6/29/09	Community Art Center	5000
└ Spiral Q Puppet Theater	3114 Spring Garden St., 2nd floor	Philadelphia	19104	4831	6/29/09	General operating support	5000
└ University City Arts League	4226 Spruce St.	Philadelphia	19104	4832	6/29/09	General operating support	5000
└ Village of Arts and Humanities	2544 Germantown Ave.	Philadelphia	19133	4833	6/29/09	General operating support	5000
							131,500
							WORKSHOP Grant (1,500) a
							130,000 PL
							✓

PROPOSAL SUMMARY FORM

Application Deadline: Received by Friday, May 1, 2009 at 5:00 pm.



Organization Name: _____

Address: _____

Phone: _____ Fax: _____

Primary Contact E-mail: _____ Web site: _____

Executive Director: _____

\$ _____ Amount requested

Primary Contact: _____
(if different)

\$ _____ Organizational revenues for
last completed fiscal year

Fiscal Agent: _____
(if applicable)

\$ _____ Organizational budget
for current year

Fiscal year begins _____

Request is for: ☐ General Operating Support ☐ Project Support
(select one)

\$ _____ Project budget

\$ _____ Funds committed to
project to date

If applicable, project description (ten words or less):

☐ Yes ☐ No Is this your first application
to the Bartol Foundation?

Mission:

Brief historical sketch of organization (as context for this request).

Please check off required attachments:

- ☐ Proposal Summary Form: 2 copies
- ☐ Proposal Narrative, (no more than 3 pages): 2 copies
- ☐ Proposal budget, with funds committed to date, if project support is requested: 2 copies
- ☐ Current year organizational budget
- ☐ Most recent audited financial statements or, if unavailable, most recent 990
- ☐ List of Board of Directors with affiliations
- ☐ IRS determination letter for 501(c)(3) status
- ☐ Annual report or overview of activities for the past year