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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 change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>STOCKTON RUSH BARTOL FOUNDATION</b>			A Employer identification number <b>23-2318470</b>
	Number and street (or P O box number if mail is not delivered to street address) <b>230 SOUTH BROAD STREET</b>		Room/suite <b>1003</b>	B Telephone number <b>215-545-4037</b>
C If exemption application is pending, check here ► <input type="checkbox"/> D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/>				
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"/>				
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) ► \$ <b>4,921,579.</b> (Part I, column (d) must be on cash basis)		J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		
<b>Part I</b> 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
Revenue	1 Contributions, gifts, grants, etc., received	<b>42,500.</b>		<b>N/A</b>
	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	<b>137,475.</b>	<b>137,247.</b>	<b>STATEMENT 2</b>
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	<b>&lt;951,069.&gt;</b>		<b>STATEMENT 1</b>
	b Gross sales price for all assets on line 6a	<b>5,304,517.</b>		
	7 Capital gain net income (from Part IV, line 2)		<b>0.</b>	
	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	<b>&lt;49,488.&gt;</b>	<b>&lt;55,304.&gt;</b>	<b>STATEMENT 3</b>	
12 Total. Add lines 1 through 11	<b>&lt;820,582.&gt;</b>	<b>81,943.</b>		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	<b>72,100.</b>		<b>72,100.</b>
	14 Other employee salaries and wages	<b>25,021.</b>		<b>25,021.</b>
	15 Pension plans, employee benefits	<b>6,596.</b>		<b>6,596.</b>
	16a Legal fees			
	b Accounting fees	<b>STMT 4</b>	<b>10,713.</b>	<b>10,713.</b>
	c Other professional fees	<b>STMT 5</b>	<b>27,859.</b>	<b>0.</b>
	17 Interest		<b>27,859.</b>	
	18 Taxes	<b>STMT 6</b>	<b>10,465.</b>	<b>2,271.</b>
	19 Depreciation and depletion		<b>938.</b>	<b>0.</b>
	20 Occupancy		<b>20,436.</b>	<b>0.</b>
	21 Travel, conferences, and meetings		<b>2,550.</b>	<b>0.</b>
	22 Printing and publications		<b>399.</b>	<b>0.</b>
	23 Other expenses	<b>RECEIVED STMT 7</b>	<b>11,152.</b>	<b>0.</b>
	24 Total operating and administrative expenses. Add lines 13 through 23		<b>188,229.</b>	<b>30,130.</b>
25 Contributions, gifts, grants paid		<b>130,000.</b>		
26 Total expenses and disbursements. Add lines 24 and 25	<b>RECEIVED STMT 7 IRS OSC FEB 22 2009</b>	<b>318,229.</b>	<b>30,130.</b>	
27 Subtract line 26 from line 12:		<b>&lt;1,138,811.&gt;</b>		
a Excess of revenue over expenses and disbursements				
b Net investment income (if negative, enter -0-)		<b>51,813.</b>		
c Adjusted net income (if negative, enter -0-)			<b>N/A</b>	

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.
	c	Investments - corporate bonds	STMT 9	903,262.	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.
	14	Land, buildings, and equipment basis ►	24,363.		
		Less accumulated depreciation	STMT 11 ►	23,257.	2,044. 1,106. 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.

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**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			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
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	{ }		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

8 286,612.

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 ►  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

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-)

3 Add lines 1 and 2

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

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

6a	5,071.
6b	
6c	
6d	

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here  if Form 2220 is attached9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**11 Enter the amount of line 10 to be: **Credited to 2009 estimated tax** ►

4,553.

Refunded ►

4,553.

0.

11 0.

11 0.

**Part VII-A Statements Regarding Activities**

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?

Yes

X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?

X

*If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*

c Did the foundation file Form 1120-POL for this year?

X

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

X

*If "Yes," attach a detailed description of the activities*3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

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?

X

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

X

*If "Yes," attach the statement required by General Instruction T.*

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

X

● By language in the governing instrument, or

X

● 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?

X

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

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

X

PA

X

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)

X

of each state as required by *General Instruction G?* If "No," attach explanation9 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)	<input type="checkbox"/> 11 <input checked="" type="checkbox"/> X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	<input type="checkbox"/> 12 <input checked="" type="checkbox"/> X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.BARTOL.ORG</u>	<input type="checkbox"/> 13 <input checked="" type="checkbox"/> X
14	The books are in care of ► <u>STOCKTON RUSH BARTOL FOUNDATION</u> Telephone no. ► <u>215-545-4037</u> Located at ► <u>230 SOUTH BROAD STREET SUITE 1003, PHILADELPHIA</u> , ZIP+4 ► <u>19102</u>	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► <input type="checkbox"/> 15 ► <input type="checkbox"/> 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.		<b>Yes</b>	<b>No</b>
<b>1a</b>	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>b</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
<b>c</b>	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 <input checked="" type="checkbox"/> X
<b>2</b>	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)):		
<b>a</b>	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>b</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
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____, _____, _____		
<b>3a</b>	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>b</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
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a <input checked="" type="checkbox"/> X
<b>b</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 <input checked="" type="checkbox"/> 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)?

Organizations relying on a current notice regarding disaster assistance check here

N/A



5b

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.

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
BETH FELDMAN BRANDT C/O STOCKTON RUSH BARTOL FOUNDATION, PHILADELPHIA, PA 19102 SEE ATTACHED LIST	EXECUTIVE DIRECTOR 40.00	72,100.	2,163.	0.
	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 VIII** **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

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

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

0

## **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.

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	N/A	
2		
3		
4		

Part IX-B | Summary of Program-Related Investments

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

---

**Amount**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
<b>1</b>	<b>NONE</b>	
<b>2</b>		0.

All other program-related investments. See instructions.

All other program related investments. See instructions.

3 \_\_\_\_\_  
\_\_\_\_\_

**Total. Add lines 1 through 3**

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 <b>Total</b> (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 <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,402,983.
6 <b>Minimum investment return.</b> 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 <b>Distributable amount as adjusted.</b> 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 <b>Qualifying distributions.</b> 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 <b>Adjusted qualifying distributions.</b> 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.

**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			0.	
a Enter amount for 2007 only				
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.			0.	
a Applied to 2007, but not more than line 2a				
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.			

**Part XIV | Private Operating Foundations (see instructions and Part VII-A, question 9)**

N/A

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

		Information described in Section				
		Prior 3 years			(e) Total	
		(a) 2008	(b) 2007	(c) 2006	(d) 2005	
2	a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
	b 85% of line 2a					
	c Qualifying distributions from Part XII, line 4 for each year listed					
	d Amounts included in line 2c not used directly for active conduct of exempt activities					
	e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	3 Complete 3a, b, or c for the alternative test relied upon:					
	a "Assets" alternative test - enter:					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
	b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
	c "Support" alternative test - enter:					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

**Part XV** **Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**

## 1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

**NONE**

## 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ►  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a The name, address, and telephone number of the person to whom applications should be addressed:**

EXECUTIVE DIRECTOR, STOCKTON RUSH BARTOL FOUNDATION, (215)545-4037  
230 SOUTH BROAD STREET, SUITE 1003, PHILADELPHIA, PA 19102

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

SEE ATTACHED

**c Any submission deadlines:**

**APPLICATIONS ACCEPTED MAY 1ST FOR JUNE REVIEW**

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

**NO GRANTS ARE MADE TO RELIGIOUS OR POLITICAL ORGANIZATIONS OR FOR PROGRAMS PRESENTED OUTSIDE THE CITY OF PHILADELPHIA.**

## Part XV Supplementary Information (continued)

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

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

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Form 990-PF (2008)

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

## **Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

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).
N/A	



**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

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

**2008****Name of the organization****STOCKTON RUSH BARTOL FOUNDATION****Employer identification number****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

STOCKTON RUSH BARTOL FOUNDATION

Employer identification number

23-2318470**Part I** **Contributors** (see instructions)

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

## STOCKTON RUSH BARTOL FOUNDATION

## 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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a			<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-PE

828102  
04-25-08

\* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

(D) - Asset disposed

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	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
				PURCHASED	VARIOUS	VARIOUS
SMITH BARNEY #1884	2,719,164.	2,924,622.	0.	0.	0.	<205,458. >
(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E)	(F)	
SMITH BARNEY #1884	1,402,893.	1,645,119.	0.	0.	0.	<242,226. >
(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SMITH BARNEY #487	810,166.	1,187,609.	0.	PURCHASED	VARIOUS	VARIOUS
				DEPREC.	GAIN OR LOSS	
				0.	0.	<377,443. >

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

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

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

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SMITH BARNEY #482		PURCHASED	VARIOUS	VARIOUS
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
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

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

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

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.	
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.	
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.	
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

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

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

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

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. Wasylshyn**

**Angela Watson**

# 2009 Bartol Foundation Auditor's Report

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

Thursday, October 15, 2009

Page 1 of 3

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AT 11/19/09  
PBC

<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>		Philadelphia	19104	4821	6/29/09	Music and Mentorship Program	5000
<b>C</b> <i>International Ballet Exchange</i>	4225 Chestnut St	Philadelphia	19144	4822	6/29/09	Ballet residency in three Phila. public schools	<b>40-15</b>
<b>T</b> <i>Lantern Theater Company</i>	38 E. School House Lane 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
<b>T</b> <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
<b>T</b> <i>Peregrine</i>	1400 North American St, Suite 412	Philadelphia	19122	4840	7/9/09	Enterprise Platform Management Service Subsid	5000
<b>T</b> <i>Philadelphia Dance Projects</i>	1427 Spruce St	Philadelphia	19102	4858	9/9/09	Dance TAG	1500 <b>Q</b>
<b>T</b> <i>Philadelphia Folklore Project</i>	735 S. 50th St.	Philadelphia	19143	4826	6/29/09	Folk arts education programs	5000
<b>T</b> <i>Philadelphia Young Playwrights</i>	7 Ben Franklin Parkway, 2nd floor	Philadelphia	19103-1208	4827	6/29/09	Playwriting program in Philadelphia schools.	5000
<b>T</b> <i>Print Center</i>	1614 Latimer Street	Philadelphia	19103	4828	6/29/09	Artists-in-Schools Program	5000

<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>
T Scribe Video Center	4212 Chestnut St. 3rd floor	Philadelphia	19104	4829	6/29/09	Documentary History Project for Youth	5000
T Southwest Community Enrichment Center	1341 South 46th Street	Philadelphia	19143	4830	6/29/09	Community Art Center	5000
T Spiral Q Puppet Theater	3114 Spring Garden St., 2nd floor	Philadelphia	19104	4831	6/29/09	General operating support	5000
T University City Arts League	4226 Spruce St.	Philadelphia	19104	4832	6/29/09	General operating support	5000
T Village of Arts and Humanities	2544 Germantown Ave.	Philadelphia	19133	4833	6/29/09	General operating support	5000
						WORKSHOP Grant	131,500
						( 1,500 ) a	130,000 PL
							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: \_\_\_\_\_ \$ \_\_\_\_\_ Organizational revenues for  
(if different) last completed fiscal year

Fiscal Agent: \_\_\_\_\_ \$ \_\_\_\_\_ Organizational budget  
(if applicable) 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):

<input type="checkbox"/> Yes <input type="checkbox"/> No	Is this your first application to the Bartol Foundation?
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Mission:

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

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**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