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Form **990**Department of the Treasury
Internal Revenue Service**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No 1545-0047

2008Open to Public
Inspection

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2008 calendar year, or tax year beginning **OCT 1, 2008** and ending **SEP 30, 2009**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type See Specific Instructions	C Name of organization THE GREATER ALLIANCE FOUNDATION, INC. C/O DOUG SCHWARZ Doing Business As		D Employer identification number 34-1873212
		Number and street (or P O box if mail is not delivered to street address) Room/suite 960 WEST STATE STREET 130		E Telephone number (330) 823-8560
		City or town, state or country, and ZIP + 4 ALLIANCE, OH 44601		G Gross receipts \$ 2,637,314.
		F Name and address of principal officer: DOUG SCHWARZ 960 WEST STATE STREET, SUITE 130, ALLIANCE,		H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) H(c) Group exemption number ▶
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c) (3) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527				
J Website: ▶ N/A				
K Type of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶				
L Year of formation 1998 M State of legal domicile OH				

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: THE ORGANIZATION SOLICITS DONATION TO DIRECT GIVING TOWARDS IDENTIFIABLE AND WORTHY NEEDS THAT		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets		
	3 Number of voting members of the governing body (Part VI, line 1a)	3 5	
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4 5	
	5 Total number of employees (Part V, line 2a)	5 2	
	6 Total number of volunteers (estimate if necessary)	6 10	
	7a Total gross unrelated business revenue from Part VIII, line 12, column (C)	7a 0.	
7b Net unrelated business taxable income from Form 990-E, line 34	7b 0.		
Revenue	8 Contributions and grants (Part VII, line 1h)	Prior Year 926,889.	Current Year 1,179,893.
	9 Program service revenue (Part VII, line 2g)		
	10 Investment income (Part VIII, column (A), lines 3, 4, and 5d)	166,275.	83,526.
	11 Other revenue (Part VIII, column (A), lines 5e, 6d, 8c, 9e, 10c, and 11e)	4,338.	5,873.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	1,097,502.	1,269,292.
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	522,187.	274,794.
	14 Benefits paid to or for members (Part IX, column (A), line 4)		
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	24,128.	25,731.
	16a Professional fundraising fees (Part IX, column (A), line 11e)		
	16b Total fundraising expenses (Part IX, column (D), line 25) ▶		
Expenses	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	62,525.	70,424.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	608,840.	370,949.
	19 Revenue less expenses. Subtract line 18 from line 12	488,662.	898,343.
	20 Total assets (Part X, line 16)	Beginning of Year 7,829,155.	End of Year 8,753,772.
Net Assets or Fund Balances	21 Total liabilities (Part X, line 26)	2,840,998.	2,760,107.
	22 Net assets or fund balances. Subtract line 21 from line 20	4,988,157.	5,993,665.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.				
Sign Here Signature of officer DOUG SCHWARZ, DIRECTOR Type or print name and title	Date 2/9/10			
	Preparer's signature MATTHEW A. LAFOUNTAIN Date 02/08/10 Check if self-employed <input type="checkbox"/> Preparer's identifying number (see instructions)			
Preparer's Use Only Firm's name (or yours if self-employed), address, and ZIP + 4	HILL, BARTH & KING LLC 119 EAST STATE STREET ALLIANCE, OH 44601		EIN ▶ Phone no ▶ (330) 821-2150	

May the IRS discuss this return with the preparer shown above? (see instructions)

☐ Yes ☐ No

915-17

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Part III Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission:

TO PROVIDE FOR INDIVIDUALS AND OTHER ENTITIES INTERESTED IN THE
QUALITY OF LIFE IN THE ALLIANCE AREA, THE OPPORTUNITY TO DIRECT THEIR
GIVING TOWARDS IDENTIFIABLE AND WORTHY NEEDS THAT SOMETIMES GO UNMET BY
ESTABLISHED CHARITABLE RESOURCES.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If "Yes", describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If "Yes", describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 274,794. including grants of \$) (Revenue \$)
MAKING GRANTS TO PUBLIC CHARITIES, COLLEGES, PUBLIC SCHOOL DISTRICTS,
OR GOVERNMENTAL UNITS FOR THE LONG TERM BENEFIT OF THE GREATER
ALLIANCE, OHIO COMMUNITY.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services. (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses \$ 274,794. (Must equal Part IX, Line 25, column (B).)

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C/O DOUG SCHWARZ

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Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>		
6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	X	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	X	
12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII</i>		X
13 Is the organization a school as described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the U.S.?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? <i>If "Yes," complete Schedule F, Part I</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>		X
17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20 Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>		X
21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	
22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? <i>If "Yes," complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>		X

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Part IV Checklist of Required Schedules (continued)

	Yes	No
28 During the tax year, did any person who is a current or former officer, director, trustee, or key employee:		
a Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? <i>If "Yes," complete Schedule L, Part IV</i>		X
b Have a family member who had a direct or indirect business relationship with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
c Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X

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Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable	15	
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	0	
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		X
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6a	Did the organization solicit any contributions that were not tax deductible?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year		
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		X
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		X
8	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
9	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.		
a	Did the organization make any taxable distributions under section 4966?		
b	Did the organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter: N/A		
a	Initiation fees and capital contributions included on Part VIII, line 12		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11	Section 501(c)(12) organizations. Enter: N/A		
a	Gross income from members or shareholders		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year N/A		

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Part VI Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code)

Section A. Governing Body and Management

	Yes	No
For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.		
1a Enter the number of voting members of the governing body	5	
1b Enter the number of voting members that are independent	5	
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5 Did the organization become aware during the year of a material diversion of the organization's assets?		X
6 Does the organization have members or stockholders?		X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
7b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	X	
b Each committee with authority to act on behalf of the governing body?		X
9a Does the organization have local chapters, branches, or affiliates?		X
b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
10 Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	X	
11 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

Section B. Policies

	Yes	No
12a Does the organization have a written conflict of interest policy? If "No," go to line 13		X
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?		
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done		
13 Does the organization have a written whistleblower policy?	X	
14 Does the organization have a written document retention and destruction policy?	X	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision:		
a The organization's CEO, Executive Director, or top management official?	X	
b Other officers or key employees of the organization? Describe the process in Schedule O. (see instructions)		X
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **OH**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
☐ Own website ☒ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: **SANDY FURCOLOW - 330-823-8560**
960 WEST STATE STREET, SUITE 130 44601

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if the organization did not compensate any officer, director, trustee, or key employee.

[illegible]

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Total								18,000.	0.	0.

2 Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization 0

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. **NONE**

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization 0

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Part VIII Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	1179893.				
	g Noncash contributions included in lines 1a-1f \$						
	h Total. Add lines 1a-1f			1,179,893.			
Program Service Revenue	Business Code						
	2 a						
	b						
	c						
	d						
	e						
	f All other program service revenue						
g Total. Add lines 2a-2f							
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			154,798.			154,798.
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross Rents	(i) Real	(ii) Personal				
	b Less: rental expenses						
	c Rental income or (loss)						
	d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
	b Less: cost or other basis and sales expenses						
	c Gain or (loss)						
	d Net gain or (loss)			<71,272.>			<71,272.>
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	a					
	b Less: direct expenses	b					
	c Net income or (loss) from fundraising events						
	9 a Gross income from gaming activities. See Part IV, line 19	a					
	b Less: direct expenses	b					
	c Net income or (loss) from gaming activities						
	10 a Gross sales of inventory, less returns and allowances	a					
b Less: cost of goods sold	b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue			Business Code				
11 a MISCELLANEOUS INCOME		900001	5,873.			5,873.	
b							
c							
d All other revenue							
e Total. Add lines 11a-11d			5,873.				
12 Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e			1,269,292.	0.	0.	89,399.	

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Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	274,794.	274,794.		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	18,000.		18,000.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	5,910.		5,910.	
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes	1,821.		1,821.	
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	21,595.		21,595.	
d Lobbying				
e Professional fundraising services See Part IV, line 17				
f Investment management fees	9,279.		9,279.	
g Other	1,115.		1,115.	
12 Advertising and promotion	1,070.		1,070.	
13 Office expenses	1,211.		1,211.	
14 Information technology				
15 Royalties				
16 Occupancy	3,000.		3,000.	
17 Travel	219.		219.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	557.		557.	
23 Insurance	2,270.		2,270.	
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a PRINTING AND PUBLICATIONS	10,562.		10,562.	
b MISCELLANEOUS	7,746.		7,746.	
c RECEPTIONS	5,040.		5,040.	
d DUES & SUBSCRIPTIONS	2,429.		2,429.	
e UTILITIES	1,256.		1,256.	
f All other expenses	3,075.		3,075.	
25 Total functional expenses. Add lines 1 through 24f	370,949.	274,794.	96,155.	0.
26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

THE GREATER ALLIANCE FOUNDATION, INC.
C/O DOUG SCHWARZ

Form 990 (2008)

34-1873212 Page **11**

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing		1	
	2 Savings and temporary cash investments	227,303.	2	85,668.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net		4	5,873.
	5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment: cost basis	4,298.		
	b Less: accumulated depreciation. Complete Part VI of Schedule D	3,752.	1,103.	546.
	11 Investments - publicly traded securities	3,615,116.	11	5,121,410.
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	3,985,633.	15	3,540,275.
16 Total assets. Add lines 1 through 15 (must equal line 34)	7,829,155.	16	8,753,772.	
Liabilities	17 Accounts payable and accrued expenses	454.	17	495.
	18 Grants payable	174,051.	18	211,649.
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable		24	
	25 Other liabilities. Complete Part X of Schedule D	2,666,493.	25	2,547,963.
	26 Total liabilities. Add lines 17 through 25	2,840,998.	26	2,760,107.
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	2,004,412.	27	3,298,370.
	28 Temporarily restricted net assets	1,435,245.	28	1,191,827.
	29 Permanently restricted net assets	1,548,500.	29	1,503,468.
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	4,988,157.	33	5,993,665.
	34 Total liabilities and net assets/fund balances	7,829,155.	34	8,753,772.

Part XI Financial Statements and Reporting

- 1** Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant?
- b** Were the organization's financial statements audited by an independent accountant?
- c** If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b** If "Yes," did the organization undergo the required audit or audits?

	Yes	No
2a		X
2b		X
2c		
3a		X
3b		

Department of the Treasury
Internal Revenue Service

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

2008
Open to Public
Inspection

Employer identification number	34-1873212
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Part I	Reason for Public Charity Status (All organizations must complete this part.) (see instructions)
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The organization is not a private foundation because it is: (Please check only **one** organization.)

- 1 ☐ A church, convention, conference of churches, or association of churches described in **section 170(b)(1)(A)(i)**.

2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**. (Attach Schedule H.)

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.

7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)

9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete the Part III.)

10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**. (see instructions)

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I b ☐ Type II c ☐ Type III - Functionally integrated d ☐ Type III - Other

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f ☐ If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box _____

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?

(ii) A family member of a person described in (i) above?

(iii) A 35% controlled entity of a person described in (i) or (ii) above?

h Provide the following information about the organizations the organization supports.

[illegible]

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule A (Form 990 or 990-EZ) 2008

THE GREATER ALLIANCE FOUNDATION, INC.

Schedule A (Form 990 or 990-EZ) 2008 C/O DOUG SCHWARZ

34-1873212 Page 2

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	328,823.	613,982.	673,923.	926,889.	1179893.	3723510.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 - 3	328,823.	613,982.	673,923.	926,889.	1179893.	3723510.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						2158618.
6 Public Support. Subtract line 5 from line 4						1564892.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	328,823.	613,982.	673,923.	926,889.	1179893.	3723510.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	56,024.	112,728.	134,687.	170,575.	83,526.	557,540.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)					5,873.	5,873.
11 Total support. Add lines 7 through 10						4286923.

12 Gross receipts from related activities, etc. (see instructions)

12

13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3)

organization, check this box and stop here

▶ ☐**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	36.50 %
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	34.66 %

16a 33 1/3% support test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization▶ ☒**b 33 1/3% support test - 2007.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization▶ ☐**17a 10% -facts-and-circumstances test - 2008.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization▶ ☐**b 10% -facts-and-circumstances test - 2007.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization▶ ☐**18 Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions▶ ☐

Schedule A (Form 990 or 990-EZ) 2008

Part III. Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I)**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 - 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support (Add lines 9, 10c, 11, and 12)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	%

19a 33 1/3% support tests - 2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶ ☐

b 33 1/3% support tests - 2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ▶ ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Schedule A (Form 990 or 990-EZ) 2008

Schedule D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization **THE GREATER ALLIANCE FOUNDATION, INC.**
C/O DOUG SCHWARZ

Employer identification number
34-1873212

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	7	7
2 Aggregate contributions to (during year)	1,029,688.	54,903.
3 Aggregate grants from (during year)	57,431.	26,583.
4 Aggregate value at end of year	2,429,759.	744,500.
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

- 1 Purpose(s) of conservation easements held by the organization (check all that apply).
- | | |
|---|--|
| <input type="checkbox"/> Preservation of land for public use (e.g., recreation or pleasure) | <input type="checkbox"/> Preservation of an historically important land area |
| <input type="checkbox"/> Protection of natural habitat | <input type="checkbox"/> Preservation of certified historic structure |
| <input type="checkbox"/> Preservation of open space | |
- 2 Complete lines 2a-2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.
- | | Held at the End of the Year |
|--|-----------------------------|
| a Total number of conservation easements | 2a |
| b Total acreage restricted by conservation easements | 2b |
| c Number of conservation easements on a certified historic structure included in (a) | 2c |
| d Number of conservation easements included in (c) acquired after 8/17/06 | 2d |
- 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ _____
- 4 Number of states where property subject to conservation easement is located ▶ _____
- 5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No
- 6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ▶ _____
- 7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$ _____
- 8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No
- 9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

- 1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.
- b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
- (i) Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____
- (ii) Assets included in Form 990, Part X ▶ \$ _____
- 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:
- a Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____
- b Assets included in Form 990, Part X ▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition
 b ☐ Scholarly research
 c ☐ Preservation for future generations

- d ☐ Loan or exchange programs
 e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes ☐ No

Part IV Trust, Escrow and Custodial Arrangements. Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
1c	
1d	
1e	
1f	

- c Beginning balance
 d Additions during the year
 e Distributions during the year
 f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV.

Part V Endowment Funds. Complete if organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Investment earnings or losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ▶ _____ %
 b Permanent endowment ▶ _____ %
 c Term endowment ▶ _____ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i) unrelated organizations
 (ii) related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIV the intended uses of the organization's endowment funds.

Part VI Investments - Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment	4,298.		3,752.	546.
e Other				
Total. Add lines 1a-1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				546.

Schedule D (Form 990) 2008

Total. (Col (b) should equal Form 990, Part X, col (B) line 12) ►**Total.** (Col (b) should equal Form 990, Part X, col (B) line 13) ►**Total.** (Column (b) should equal Form 990, Part X, col (B) line 15.)**Total.** (Column (b) should equal Form 990, Part X, col (B) line 25.)

34-1873212 Page 4

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the U.S.**

▶ **Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22.**
▶ **Attach to Form 990.**

OMB No. 1545-0047

2008

**Open to Public
Inspection**

Name of the organization **THE GREATER ALLIANCE FOUNDATION, INC.**

Employer identification number
34-1873212

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☐ Yes ☒ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed. ▶ ☐

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
YMCA PARTNER WITH YOUTH 205 S UNION AVENUE ALLIANCE, OH 44601	34-0714792	501(C)(3)	10,600.	0.			
JOHN HOPKINS 733 NORTH BROADWAY BALTIMORE, MD 21218	52-0595110	501(C)(3)	10,000.	0.			
ALLIANCE AREA DOMESTIC VIOLENCE PO BOX 3622 ALLIANCE, OH 44601	34-1329875	501(C)(3)	14,324.	0.			
INDEPENDENCE DAY FIREWORKS COUNCIL 75 W GLAMORGAN, SUITE 110 ALLIANCE, OH 44601	34-1873212	501(C)(3)	12,000.	0.			
INTERFAITH DAYCARE 470 EAST BROADWAY STREET ALLIANCE, OH 44601	34-1033910	501(C)(3)	57,000.	0.			
ONE BOOK ONE COMMUNITY 215 EAST BROADWAY STREET ALLIANCE, OH 44601	34-0714687	501(C)(3)	5,290.	0.			

2 Enter total number of section 501(c)(3) and government organizations

3 Enter total number of other organizations

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) 2008

SCHEDULE I-1
(Form 990)Department of the Treasury
Internal Revenue Service**Continuation Sheet for Schedule I (Form 990)**
▲ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).OMB No 1545-0047
2008**Open to Public**
Inspection

Name of the organization

THE GREATER ALLIANCE FOUNDATION, INC.
C/O DOUG SCHWARZEmployer identification number
34-1873212**Part I** Continuation of Grants and Other Assistance to Governments and Organizations in the U.S. (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNITED WAY 4825 HIGBEE AVENUE NW CANTON, OH 44718	13-4254191	501(C)(3)	6,500.	0.			
ALLIANCE CAREER CENTER 347 EAST SOUTH TEMPLE ALLIANCE, OH 44601	34-4000040	501(C)(3)	19,638.	0.			
SISTERS OF CHARITY 400 MARKET AVENUE N, SUITE 300 CANTON, OH 44702	34-1832697	501(C)(3)	10,000.	0.			
EARLY CHILDHOOD EDUCATION 285 WEST OXFORD STREET ALLIANCE, OH 44601	20-4763143	501(C)(3)	61,200.	0.			
YWCA 239 E MARKET STREET ALLIANCE, OH 44601	34-1832697	501(C)(3)	5,500.	0.			
LAKE AREA FREE CLINIC 856 ARMOUR ROAD, SUITE B OCONOMOWOC, WI 53066	39-2006388	501(C)(3)	7,000.	0.			
MARLINGTON LOCAL SCHOOLS 10320 MOULIN STREET, NE ALLIANCE, OH 44601	34-6002998	501(C)(3)	15,000.	0.			

2 Enter total number of Section 501(c)(3) and government organizations**3** Enter total number of other organizations

832241 12-17-08 LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I-1 (Form 990) 2008

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No 1545-0047

2008

Open to Public
Inspection

Name of the organization

THE GREATER ALLIANCE FOUNDATION, INC.
C/O DOUG SCHWARZ

Employer identification number
34-1873212

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SOMETIMES GO UNMET BY ESTABLISHED CHARITABLE RESOURCES IN THE ALLIANCE
AREA.

FORM 990, PART VI, SECTION A, LINE 8B: THE ORGANIZATION DOES NOT HAVE
COMMITTEES WITH THE AUTHORITY TO ACT ON BEHALF OF THE GOVERNING BODY

FORM 990, PART VI, SECTION A, LINE 10: SENT TO BOARD MEMBERS FOR APPROVAL

FORM 990, PART VI, SECTION B, LINE 15: MEETING OF THE BOARD OF DIRECTORS

FORM 990, PART VI, SECTION C, LINE 19: THE ORGANIZATION MAKES ITS
GOVERNING DOCUMENTS AVAILABLE UPON REQUEST AND ITS FINANCIAL STATEMENTS ARE
AVAILABLE IN ITS ANNUAL REPORT

For Taxable Year Ending September 30, 2009

HBK X-25

The Greater Alliance Foundation, Inc.
 EIN 34-1873212
 Bonds - GAF
 Year-ended

Date Acquired	Name	Date of Sale	Proceeds	Cost Basis	Gain/ (Loss)
Government Bonds					
	FHLMC Home Ln Mtg Corp 2425 8 0%		20,819 97	20,935 31	(115 34)
5/3/2007	US Treasury Note 4 0% Due 4/15/10	2/4/2009	26,006 84	24,588 00	1,418 84
12/27/2005	U S TSY 6% 8/15/09	1/16/2009	25,802 73	26,375 00	(572 27)
12/27/2005	U S TSY 6 5% 2/15/10	1/16/2009	15,958 01	16,200 00	(241 99)
8/1/2006	US Treasury Note Due 02/15/09	12/17/2008	50,226 56	47,710 50	2,516 06
GNMA					
6/15/2008	GNMA 04-10 B		15,902 89	15,902 89	-
10/30/2006	GNMA Pool # 781382		21,503 09	21,503 09	-
	GNMA - 274765		16 61	16 61	-
	GNMA - 266898		39 24	39 24	-
5/20/2009	GNMA Pool #780378		1,350 03	1,350 03	-
4/15/2008	GNMA 97-8 PN 7 5% DUE 4/16/17		2,619 44	2,619 44	-
8/20/2004	GNMA 2004-47 CL QD		1,510 34	1,510 34	-
12/19/2005	GNMA 2002-47 CL HM		4,175 78	4,175 78	-
7/13/2007	GNMA 05-76 A		2,533 67	2,533 67	-
12/20/2007	GNMA 01-65 PH 6 0%		4,007 25	4,007 25	-
3/19/2008	GNR 2003-100 AC 5 5% DUE 2/20/31		25,968 31	25,968 31	-
11/28/2006	GNMA 05-54 BU		11,382 71	11,382 71	-
3/31/2008	GNMA 02-83A	2/25/2009	9,398 94	9,226 60	172 34
FNMA					
12/12/2006	FNMA POOL 745251 DTD 1/1/6		15,631 07	15,631 07	-
5/20/2009	FNMA Pool #461647 Balloon		924 03	924 03	-
3/27/2008	FNBMA 545299 10/01/01		5,544 62	5,544 62	-
11/8/2005	FNMA Pool #252880		11,747 27	13,816 02	(2,068 75)
2/7/2007	FNMA POOL 545334		3,724 80	3,724 80	-
5/20/2009	FNMA Remic Ser 1993-106 CL Z		3,157 06	3,157 06	-
	FNMA 1993 105D 6 5% DUE 6/25/23		1,160 00	1,160 00	-
9/19/2005	FNMA Remic 1993 Ser 113 CL PK		2,320 17	2,320 17	-
1/23/2008	FNMA POOL 252206 6 0% Due 01/01/19		6,499 57	6,499 57	-
11/20/2006	FNMA 01-4 PC		6,337 67	6,337 67	-
3/25/2008	FNMA 94-65 LL Retail 7 375% DUE 04/25/24		4,000 00	4,000 00	-
7/30/2008	FNMA 02-66AL		18,607 95	18,663 44	(55 49)
5/20/2009	FNMA Remic Ser 1994-81 CL LL		7,000 00	7,000 00	-
5/20/2009	FNMA Remic Ser 1994-51 CL MM		3,000 00	3,000 00	-
5/20/2009	FNMA Remic Ser 1994-23 CL PX		566 70	566 70	-
Corporate Mortgage/Asset Back Securities					
	Federal Farm 07/ia2 1 credit bank		69,032 82	69,032 82	-
6/27/2006	Wshgtn Mut Mtg Sec CMO Se 2002-S5		3,817 35	3,817 35	-
6/26/2009	Residential accrdtd Ins cmo ser 2004-qs11 CL A4		2,709 92	2,709 92	-
	Huntington Bankshares 8 5% conv	4/17/2009	14,249 63	7,750 00	6,499 63
5/20/2009	DaimlerChrysler Auto Tr CMO Ser 2006-d		3,215 66	3,215 66	-
5/20/2009	Vectren Utility Holdings Inc Note	8/7/2009	18,865 00	16,869 98	1,995 02
7/23/2009	CWALT Inc 2005-6CB		619 88	619 88	-
7/29/2009	Wells Fargo MBS Tr Ser 2005-12 CL IA1		507 64	507 64	-
MUNICIPAL BONDS					
7/14/2005	FHLMC #G10430 Gold		6,246 26	6,246 26	-
2/15/2007	FHLMC Pool A00074		4,191 58	4,191 58	-
12/24/2008	FHLMC 1584L		3,242 83	3,242 83	-
3/30/2009	FHLMC 1584L		-	-	-
7/18/2005	FHLMC #E20271 Gold		5,592 72	5,592 72	-
5/20/2009	FHLMC Muticl Remic 2418 CL ME		1,418 77	1,418 77	-
10/19/2005	FHLMC #E62092 Gold		643 17	643 17	-
	FHLMC 3177 KA		6,473 17	6,473 17	-
2/6/2008	FHLMC 1547II 6 55% 8/15/08		3,000 00	3,000 00	-
3/27/2008	FHLMC 2496 5 5% 3/15/30		20,000 01	20,105 50	(105 49)
1/9/2007	Pennsylvania Electric Co		50,000 00	50,959 00	(959 00)
5/20/2009	New Castle PA RFDG Ser C Radian 4 75%		-	-	-
5/20/2009	New Castle PA RFDG Ser C Radian 5 0%	7/14/2009	24,008 89	24,018 00	(9 11)
5/24/2007	FHLMC 2840 OD		-	-	-
5/20/2009	FHLMC Muticl Remic 1622 CL LL		4,000 00	4,000 00	-
6/1/2009	Master Alternative LNS Remic Ser 2003-2 CL 6A		4,583 03	4,583 03	-
Certificates of Deposit					
12/5/2007	JP Morgan Chase Bank NA CD		75,000 00	75,000 00	-
Corporate Bonds					
4/13/2009	Simon Prop Group Note	8/7/2009	25520 95	24,383 91	1,137 04
5/28/2009	Mastr Alternative In Tr Remic Set 2003-2 CL 6A		1,258 41	1,258 41	-
Total			677,641 01	668,029.52	9,611.49

The Greater Alliance Foundation, Inc.

EIN: 34-1873212

Bonds - Gift Annuity

October 2008 - September 2009

Date Acquired	Name	Date of Sale	Proceeds	Cost Basis	Gain/ (Loss)
Corporate Bonds					
10/9/2008	DTE Energy Company Bonds	4/15/2009	50,000.00	49,896.50	103.50
GNMA					
12/18/2006	GNMA POOL 780921 dtd 11/01/98		3,826.95	3,826.95	-
1/18/2008	GNMA 2002-56B REMIC 5.134% 12/15/26		4,638.52	4,638.52	-
9/15/2004	GNMA 2002-51 CL D		6,532.99	6,532.99	-
12/20/2007	GNMA 01-65 PH 6 0%		9,350.27	9,350.27	-
5/20/2008	GNMA 05-88A		10,580.31	10,580.30	0.01
2/16/2006	GNMA 2002-80 CL EC		8,055.80	8,055.80	-
12/12/2006	GNMA 02-80 EC		3,811.28	3,811.28	-
FNMA					
6/23/2005	FNMA REMIC 1994-18 CL D		2,259.58	3,207.00	(947.42)
11/14/2006	FNMA G 93 17K		4,167.00	4,167.00	-
11/20/2006	FNMA 01-4PC		9,136.12	9,136.12	-
5/24/2007	FNMA 03-34 ET		15,999.99	15,720.00	279.99
9/17/2007	FNMA 94-72 J		27,001.11	27,001.11	-
	FHLMC #C80342		2,303.42	2,303.42	-
5/16/2005	fhlmc ser 1326 CL J		1,873.52	1,873.52	-
10/30/2006	FHLMC 1708 E	3/23/2009	2,353.60	2,391.61	(38.01)
7/8/2005	FHLMC Ser 2113 CL QE		344.92	371.91	(26.99)
6/7/2005	FHLMC POOL G30175		745.17	745.17	-
6/3/2004	FHLMC #C01120		509.36	509.36	-
10/27/2006	FHLMC 2627 EV		6,344.34	6,344.34	-
9/20/2007	FHLMC 3177 KA		10,413.40	10,413.40	-
7/12/2005	FNMA REMIC 1992-125 CL L		4,721.52	4,721.52	-
1/7/2005	FHLMC REMIC 2891 CL MX		1,227.92	1,227.92	-
CMO					
8/29/2005	FHLMC #M80770	9/15/2009	14,641.62	14,861.96	(220.34)
9/20/2005	FHLMC REMIC Ser 2610 CL VB		539.32	539.32	-
6/26/2009	CWMBS Inc. ser 2004-J1 CL 1A1		2,007.06	2,007.06	-
6/26/2009	Master Alt LN TR Remic Ser 2003-2 CL 6 A		2,531.45	2,531.45	-
7/23/2009	CWALT INC. 2005-6CB CL 1A1		536.44	536.44	-
Total Assets Sold/Gain(Loss)			206,452.98	207,302.24	(849.26)

The Greater Alliance Foundation, Inc.

EIN: 34-1873212

Stock Investments

Year-ended:

Date Acquired	Name	Date Sold	Proceeds	Cost Basis	Gain
Common Stock					
12/24/2007	AMGEN INC.	3/24/2009	5,026.98	4,775.78	251.20
		7/8/2009	5,970.85	4,775.78	1,195.07
12/6/2007	Cytec Ind. Inc	8/21/2009	8,422.13	18,779.97	(10,357.84)
5/8/2007	Cytec Ind., Inc.	4/29/2009	7,719.80	23,503.64	(15,783.84)
10/5/2007	Cytec Ind., Inc	5/4/2009	4,700.47	12,973.00	(8,272.53)
		8/21/2009	5,450.94	12,973.00	(7,522.06)
9/15/2003	Diebold Inc.	10/1/2008	17,044.90	26,871.01	(9,826.11)
		8/4/2009	5,292.86	9,403.37	(4,110.51)
		9/3/2009	14,872.66	25,482.92	(10,610.26)
1/25/2005	Diebold Inc.	9/30/2009	10,593.47	12,530.45	(1,936.98)
12/11/2007	Ebay, Inc.	10/1/2008	21,999.87	34,812.00	(12,812.13)
10/23/2008	Emerson Electric	12/17/2008	10,799.93	9,519.00	1,280.93
6/1/2006	Energy Conv Devices	10/6/2008	67,093.40	53,612.00	13,481.40
9/26/2008	Energy Conv Devices	10/6/2008	10,322.06	11,984.00	(1,661.94)
10/31/2005	General Electric	10/1/2008	12,551.82	17,006.64	(4,454.82)
11/10/2006	General Electric	10/1/2008	10,041.46	14,068.00	(4,026.54)
12/27/2005	GENERAL ELECTRIC	10/1/2008	2,510.37	3,532.00	(1,021.63)
7/31/2008	Linn Energy LLC Units	10/28/2008	7,499.95	10,904.00	(3,404.05)
9/8/2008	Linn Energy LLC Units	10/28/2008	7,499.96	9,967.60	(2,467.64)
9/16/2008	Linn Energy LLC Units	10/30/2008	16,799.90	16,187.00	612.90
10/8/2008	Linn Energy LLC Units	10/30/2008	8,399.95	6,100.00	2,299.95
11/14/2007	Mylan, Inc.	1/12/2009	10,900.73	13,986.40	(3,085.67)
12/22/2008	Conviven	12/22/2008	1,144.22	1,137.86	6.36
4/8/2009	Schering Plough	4/8/2009	10,331.37	10,318.00	13.37
5/28/2009	General Mills	5/29/2009	20,807.46	20,844.72	(37.26)
5/20/2009	DPL Inc	7/30/2009	16,679.56	15,820.00	859.56
5/20/2009	Fairpoint Communication Inc.	5/27/2009	6.97	12.71	(5.74)
5/20/2009	McDermott Intl Inc.	5/27/2009	14,197.27	11,981.25	2,216.02
5/4/2009	Wyeth	5/19/2009	35,671.56	34,383.36	1,288.20
Preferred and mutual funds					
3/31/2008	Schering Plough PFD	3/24/2009	10,504.94	7,675.00	2,829.94
Total			380,857.81	455,920.46	(75,062.65)

The Greater Alliance Foundation, Inc.

EIN: 34-1873212

Investments - Gift Annuity

Year Ended

Date Acquired	Name	Date Sold	Proceeds	Cost Basis	Gain
Common Stock					
9/26/2008	DuPont El De Nemours	11/11/2008	14,304.91	20,923.95	(6,619.04)
10/21/2008	DuPont El De Nemours	9/18/2009	6,617.12	6,805.80	(188.68)
3/4/2009	Unilever PLC	5/7/2009	10,875.52	9,039.65	1,835.87
	Total		31,797.55	36,769.40	(4,971.85)