Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note: *The foundation may be able to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-0052

2008

For calendar year 2008, or tax year beginning OCTOBER 1 , 2008, and ending SEPTEMBER 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: J. FRANK SCMIDT FAMILY CHARITABLE FOUNDATION

Number and street (or P.O box number if mail is not delivered to street address): PO BOX 189 — Room/suite:

City or town, state, and ZIP code: BORING, OR 97009

A Employer identification number: 93-1265440

B Telephone number (see page 10 of the instructions)

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 5,362,215

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions).)*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3 Interest on savings and temporary cash investments	91,950	91,950		
	4 Dividends and interest from securities	133,333	133,333		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	(314,737)			
	b Gross sales price for all assets on line 6a 2,271,592				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)	0			
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	(89,454)	225,283	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	641			641
	b Accounting fees (attach schedule)	5,007			5,007
	c Other professional fees (attach schedule)	8,211	8,211		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	2,605	1,934		671
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	108			108
	24 **Total operating and administrative expenses.** Add lines 13 through 23	16,572	10,145	0	6,427
	25 Contributions, gifts, grants paid	269,995			269,995
	26 **Total expenses and disbursements.** Add lines 24 and 25	286,567	10,145	0	276,422
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	(376,021)			
	b **Net investment income** (if negative, enter -0-)		215,138		
	c **Adjusted net income** (if negative, enter -0-)			0	

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Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	1,227	37,532	37,532
	2 Savings and temporary cash investments	1,021,749	340,324	340,324
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶ F-1	500,000	500,000	500,000
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule) F-2	414,113	419,026	368,350
	c Investments—corporate bonds (attach schedule) F-2	453,626	629,878	672,601
	11 Investments—land, buildings, and equipment. basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule) F-3 & F-4	3,116,861	3,203,333	3,441,946
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ PREPAID EXCISE TAX)		1,462	1,462
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	5,507,576	5,131,555	5,362,215
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	5,507,576	5,131,555	
	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** (see page 17 of the instructions)	5,507,576	5,131,555	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	5,507,576	5,131,555	

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	5,507,576
2 Enter amount from Part I, line 27a	2	(376,021)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	5,131,555
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	5,131,555

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	SEE SCHEDULE F-5	P	VARIOUS	VARIOUS
b				
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	2,271,592		2,586,329	(314,737)
b				
c				
d				
e				

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

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

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	(314,737)
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2007	302,406	5,876,960	0.0515
2006	302,398	6,421,359	0.0471
2005	284,525	5,677,107	0.0501
2004	326,382	5,328,399	0.0613
2003	230,271	4,705,474	0.0489

2 **Total** of line 1, column (d)	2	0.2589
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	.05178
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	5,068,488
5 Multiply line 4 by line 3	5	262,446
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,151
7 Add lines 5 and 6	7	264,597
8 Enter qualifying distributions from Part XII, line 4	8	276,422

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling letter: ____________ (attach copy of ruling letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b	1	2,151
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	2,151
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	2,151
6	Credits/Payments:		
a	2008 estimated tax payments and 2007 overpayment credited to 2008 — 6a		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	0
8	Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	73
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	2,224
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	0
11	Enter the amount of line 10 to be: **Credited to 2009 estimated tax** ▶ **Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		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?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	NA	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ OREGON			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIVon page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ JAN BARKLEY Telephone no. ▶ 503-663-1000
Located at ▶ 9500 S.E. 327TH, BORING, OREGON ZIP+4 ▶ 97009-9710

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

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

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

1a During the year did the foundation (either directly or indirectly):

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No

(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No

			Yes	No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		

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

			Yes	No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?	1c		X

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):

a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? ☐ Yes ☒ No
If "Yes," list the years ▶ 20 ___ , 20 ___ , 20 ___ , 20 ___

			Yes	No
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions.)	2b		

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
▶ 20 ___ , 20 ___ , 20 ___ , 20 ___

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No

			Yes	No
b	If "Yes," did it have excess business holdings in 2008 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

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

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

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see page 23 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE SCHEDULE F-6				

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

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

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

Total number of others receiving over $50,000 for professional services . . . . ▶ 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	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See page 24 of the instructions 3	
Total. Add lines 1 through 3 . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	3,863,084
b	Average of monthly cash balances	1b	705,404
c	Fair market value of all other assets (see page 25 of the instructions)	1c	500,000
d	**Total** (add lines 1a, b, and c)	1d	5,068,488
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,068,488
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,068,488
6	**Minimum investment return.** Enter 5% of line 5	6	253,424

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

1	Minimum investment return from Part X, line 6			1	253,424
2a	Tax on investment income for 2008 from Part VI, line 5	2a	2,151		
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	2,151
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	251,273
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	251,273
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	251,273

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	276,422
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	276,422
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	2,151
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	274,271

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

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

			(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1	Distributable amount for 2008 from Part XI, line 7					251,273
2	Undistributed income, if any, as of the end of 2008:					
a	Enter amount for 2007 only					
b	Total for prior years: 20____,20____,20____					
3	Excess distributions carryover, if any, to 2007:					
a	From 2003					
b	From 2004	61,552				
c	From 2005	3,418				
d	From 2006	29,760				
e	From 2007	16,426				
f	**Total** of lines 3a through e		111,156			
4	Qualifying distributions for 2008 from Part XII, line 4: ▶ $ 276,422					
a	Applied to 2007, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)					
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)					
d	Applied to 2008 distributable amount					251,273
e	Remaining amount distributed out of corpus		25,149			
5	Excess distributions carryover applied to 2008 *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6	**Enter the net total of each column as indicated below:**					
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		136,305			
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					
d	Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions			0		
e	Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				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)(E) or 4942(g)(3) (see page 27 of the instructions)					
8	Excess distributions carryover from 2003 not applied on line 5 or line 7 (see page 27 of the instructions)					
9	**Excess distributions carryover to 2009.** Subtract lines 7 and 8 from line 6a		136,305			
10	Analysis of line 9:					
a	Excess from 2004	61,552				
b	Excess from 2005	3,418				
c	Excess from 2006	29,760				
d	Excess from 2007	16,426				
e	Excess from 2008	25,149				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling . . . . ▶ N/A

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a	0	0	0	0	0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	0	0	0	0	0
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter ⅔ of minimum investment return shown in Part X, line 6 for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1 Information Regarding Foundation Managers:

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

N/A

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.

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

Check here ▶ ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

N/A

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

N/A

c Any submission deadlines:

N/A

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

N/A

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
a *Paid during the year*				
SEE SCHEDULES F-7 - F-10				269,995
Total . . . . . . ▶ 3a				269,995
b *Approved for future payment*				
Total . . . . . . ▶ 3b				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	91,950	
4 Dividends and interest from securities			14	133,333	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	(314,737)	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		(89,454)	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 (89,454)

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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). (See page 28 of the instructions.)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☐ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

X Jane E. Barkley — Signature of officer or trustee | Date: 6-1-10 | Title: Trustee

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ☐	Preparer's identifying number (see Signature on page 30 of the instructions)
Mary E. Perkins	5/18/10		
Firm's name (or yours if self-employed), address, and ZIP code	MARY E. PERKINS, CPA, P.C. 520 SW 6TH, #1110 PORTLAND, OR 97204	EIN ▶ 93-1303840	Phone no. 503-226-7188

THE J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATION

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART I: LINE 16a - LEGAL FEES:

Hanna Strader	$	641

PART I. LINE 16b - ACCOUNTING FEES:

Mary E. Perkins, CPA, P.C. - Accounting fees for the preparation of Form 990-PF	$	5,007

PART I: LINE 16c - OTHER PROFESSIONAL FEES:

Lincoln Financial Securities - Broker fees	$	8,211

PART I: LINE 18 - TAXES:

State of Oregon Department of Justice Fee, FYE 9/30/08	$	671
Federal Excise Tax , FYE 9/30/08		1,934
Total Taxes	$	2,605

PART I: LINE 23 - OTHER EXPENSES:

Fees for annual report - Oregon Corporation Division	$	50
Office expense		58
Total Other Expenses	$	108

PART II: LINE 7 - OTHER NOTES AND LOANS RECEIVABLE:

Note receivable - U.S. Capital Trust, LLC, 10% interest	$	500,000

THE J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATION

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART II: LINE 10b - INVESTMENTS - CORPORATE STOCK:

	NUMBER OF SHARES	AVERAGE COST PER SHARE	TOTAL COST
Etelos, Inc. - preferred stock	62,500.00	$ 2.00	$ 125,000
Bank America Corp. common stock	14,382.37	$ 20.44	294,026
Total Corporate Stock			$ 419,026

PART II: LINE 10c - INVESTMENTS - CORPORATE BONDS.

	QUANITY		
Bank of America Corp, Senior Note 4.875%, matures 9/15/12	150,000	-	$ 141,619
Citigroup, Inc., Senior Unsec. Note 4.625%, matures 8/3/10	150,000		$ 146,226
GE Capital Corp Medium Term Note 4.75%, matures 9/15/14	200,000		$ 193,722
Wachovia Corp Medium Term Note 5.7%, matures 8/1/13	150,000	-	148,311
Total Corporate bonds			$ 629,878

THE J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATION

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART II: LINE 13 - INVESTMENTS - OTHER:

MUTUAL FUNDS:

	NUMBER OF SHARES		AVERAGE COST PER SHARE	TOTAL COST
Calamos Growth Fund Class A	929.37	$	32.28	30,000
Calamos Growth & Income Class B	1,611.09	$	30.92	49,815
Capital World Growth & Income	1,128.52	$	33.49	37,793
CGM Focus Fund	762.49	$	26.24	20,004
CGM Mutual Fund	874.45	$	23 11	20,212
Columbia Acorn	495.97	$	16.13	8,000
Dodge & Cox Balanced	338.97	$	48.23	16,917
Dodge & Cox Stock Fund	1,642.18	$	99.87	164,008
Eaton Vance World Health	3.02	$	10.08	31
Europacific Growth	571.93	$	39.83	22,782
Federated Kaufman Fund	1,364.06	$	5.42	7,395
Fidelity Advisor Emerging Markets	3,534.42	$	12.20	43,123
Fidelity Select Wireless	5,494.51	$	5.46	30,019
Franklin Income Fund	25,593.13	$	2.49	63,773
Growth Fund of America	1,777.66	$	23.57	41,899
Growth Fund of America Class F-1	2,393.49	$	20.89	50,000
Income Fund of America	2,684.18	$	20.06	53,835
International Growth & Income	2,401.95	$	21.41	51,416
Investment Co. of America	4,058.85	$	21.57	87,555
Keeley Small Cap Value Class A	1,092.37	$	17.73	19,370
Mutual Series Class A	1,412.71	$	14.39	20,321
Mutual Series Class Z	1,271.43	$	21.52	27,364
Oakmark Equity and Income Fund	7,573.17	$	26.02	197,056
T. Rowe Price Health Sciences	1,899.17	$	20.96	39,808
T. Rowe Price Mid-Cap Value	1,128.03	$	21.52	24,279
Seligman Comm and Information	4,802.09	$	27.55	132,315
Vanguard Health Care Fund	1,594.20	$	120.58	192,223
Vanguard Wellsley Income	4,100.60	$	21.83	89,504
Vanguard Mid Cap Stock Index	5,020.67	$	11.12	55,827
Total Mutual Funds				1,596,644

THE J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATION

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART II: LINE 13 - INVESTMENTS - OTHER (Continued):

CERTIFICATES OF DEPOSITS:

	NUMBER OF SHARES	AVERAGE COST PER SHARE	TOTAL COST
Washington Mutual Bank, 4.65% MATURES 12/31/10	100,000	1.00	100,000
Flagstar Bank FSB, 5.15%, matures 9/14/10	100,000	1 00	100,000
Total Certificates of Deposits			200,000

UNIT INVESTMENT TRUST:

	NUMBER OF SHARES	AVERAGE COST PER SHARE	TOTAL COST
First Trust, unit 1990 diversified equity strategic allocation	49,433	10.11	499,995
First Trust, unit 1994 inflation hedge port series monthly cash	5,026	8.19	41,141
First Trust, unit 2053 investment grade select closed end port. Series 12	83,727	10 34	865,553
Total Unit Investment Trust			1,406,689
TOTAL INVESTMENTS - OTHER			$ 3,203,333

THE J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATION

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART IV: LINE 1 - CAPITAL GAINS AND LOSSES:	NUMBER OF SHARES	DATE PURCHASED	DATE SOLD	SALES PRICE	COST BASIS	GAIN/ (LOSS)
Capital World Bond	2,802.69	VARIOUS	10/16/2008	50,000	55,966	(5,966)
Capital World Bond	2,802.69	VARIOUS	10/16/2008	50,000	55,966	(5,966)
Vanguard Short Term Investment Grade	2,018.16	1/14/2008	10/17/2008	20,000	21,675	(1,675)
Dodge & Cox Income Fund	6,708.41	1/2/2008	10/20/2008	75,000	84,183	(9,183)
Seligman Cash Management	40,000.00	VARIOUS	10/20/2008	40,000	40,000	-
Capital World Bond	2,754.82	VARIOUS	2/4/2009	50,000	54,965	(4,965)
Capital World Bond	2,754.82	VARIOUS	2/4/2009	50,000	54,965	(4,965)
Dodge & Cox Income Fund	5,814.12	VARIOUS	2/4/2009	69,188	72,867	(3,679)
Seligman Cash Management	40,841.36	VARIOUS	2/4/2009	40,841	40,841	-
Vanguard Short Term Investment Grade	2,847.33	VARIOUS	2/4/2009	27,904	30,490	(2,586)
Vanguard Wellington	2,395.08	VARIOUS	2/4/2009	55,781	77,427	(21,646)
Calamos Growth Fund Class B	812.81	VARIOUS	2/20/2009	22,102	38,466	(16,364)
Calamos Growth Fund Class A	1,728.81	VARIOUS	2/20/2009	34,766	53,666	(18,900)
Capital World Growth & Income	660.79	VARIOUS	2/20/2009	14,981	22,231	(7,250)
Dodge & Cox Balanced Fund	1,105.95	2/4/2009	2/20/2009	49,981	53,229	(3,248)
Fidelity Advisor Emerging Mkts	2,662.41	VARIOUS	2/20/2009	24,981	32,640	(7,659)
Fidelity Select Wireless	2,203.44	VARIOUS	2/20/2009	9,742	10,840	(1,098)
Franklin Income Fund	19,736.84	VARIOUS	2/20/2009	29,981	50,006	(20,025)
Growth Fund of America Class A	1,870.66	VARIOUS	2/20/2009	34,981	44,091	(9,110)
Investment Co. Of America	1,352.81	VARIOUS	2/20/2009	24,981	29,232	(4,251)
Keeley Small Cap Value A	1,163.69	10/21/2008	2/20/2009	14,981	20,634	(5,653)
Oakmark Fund	93.48	VARIOUS	2/20/2009	2,011	4,837	(2,826)
Oppenheimer Global Fund	240.97	VARIOUS	2/20/2009	8,029	12,747	(4,718)
Seligman Comm and Information	1,604.49	VARIOUS	2/20/2009	40,000	43,384	(3,384)
Vanguard Windsor II	1,864.13	VARIOUS	2/20/2009	29,863	45,159	(15,296)
Capital World Bond	551.28	VARIOUS	4/23/2009	9,970	10,989	(1,019)
Fidelity Telecom & Utilities	1,513 56	VARIOUS	4/23/2009	17,856	31,207	(13,351)
Seligman Cash Management	40,000.31	VARIOUS	4/23/2009	40,000	40,000	-
First Trust, Unit 1478 investment grade select	98,709.00	9/10/2007	8/3/2009	865,559	1,000,001	(134,442)
CIT Group Inc Senior Note	218,000.00	9/10/2007	4/10/2009	218,000	210,758	7,242
Home Depot Inc Sr Note	250,000.00	9/11/2007	9/15/2009	250,000	242,867	7,133
Columbia Fair Settlement	-	VARIOUS	12/3/2008	10	-	10
Putnam Fair Settlement	-	VARIOUS	12/31/2008	103	-	103
Total Capital Gains and Losses				$ 2,271,592	$2,586,329	$ (314,737)

Schedule F-5

J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATIONS

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART VIII· LINE 1 - INFORMATION ABOUT OFFICERS, DIRECTORS, TRUSTEES, FOUNDATION MANAGERS, HIGHLY PAID EMPLOYEES AND CONTRACTORS

	Title or Position	Average Hours Per Week Devoted To Position	Contributions To Employee Benefit Plans	Expense and Other Other Expenses	Compensation
J Frank Schmidt, III 13529 S.E. Leann Court Boring, Oregon 97009	Director	0	None	None	None
Jan Schmidt Barkley 10486 S.E. Telford Road Boring, Oregon 97009	Director	6	None	None	None
Jean Schmidt Webster 7428 N. Woodson Fresno, California 93711	Director	0	None	None	None

J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATIONS

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART XVI: LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
Boy Scouts of America	Public	Charitable	500
Family Self-Sufficiency Corp	Public	Charitable	1,000
Gresham Center for Arts	Public	Charitable	14,000
Gresham Historical Society	Public	Charitable	500
Gresham Senior Center	Public	Charitable	500
Junior Achievement	Public	Charitable	300
Kiwanis Club	Public	Charitable	1,000
Lions Club	Public	Charitable	100
Loaves and Fishes	Public	Charitable	300
Make a Wish Foundation	Public	Charitable	1,000
Marks Prairie Community Club	Public	Charitable	1,000
Mt. Hood Pops Orchestra	Public	Charitable	300
4-H of Oregon	Public	Charitable	200
Northwest Forest Conservancy	Public	Charitable	500
Oregon Humane Society	Public	Charitable	700
Oregon Paralyzed Veterans of America	Public	Charitable	300
Oregon Public Broadcasting	Public	Charitable	500
Oregon Historical Society	Public	Charitable	200
Presbyterian Church	Public	Charitable	300
Redeemer Lutheran Church	Public	Charitable	500
Salvation Army	Public	Charitable	500
Sandy Historical Society	Public	Charitable	500
Sandy Oktoberfest	Public	Charitable	200
Special Olympics of Oregon	Public	Charitable	300
Troutdale Historical Society	Public	Charitable	1,000
Young Life	Public	Charitable	1,000
Zimmerman Heritage Farm FRW Historical Society	Public	Charitable	500
ALS Association	Public	Medical Research	500
American Cancer Society	Public	Medical Research	250
American Diabetes Association	Public	Medical Research	500

J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATIONS

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART XVI: LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
American Heart Association	Public	Medical Research	350
American Lung Association	Public	Medical Research	350
American Red Cross	Public	Medical Research	200
Community Medical Foundation	Public	Medical Research	2,000
The Leukemia & Lymphoma Society	Public	Medical Research	1,850
Arthritis Foundation	Public	Medical Research	350
Doernbecher Childrens' Hospital Foundation	Public	Medical Research	500
Hutchinson Cancer Research	Public	Medical Research	500
March of Dimes	Public	Medical Research	350
Mt. Hood Hospice	Public	Medical Research	500
Mt. Hood Medical Center Foundation	Public	Medical Research	1,500
Multiple Sclerosis Society	Public	Medical Research	350
Muscular Distrophy Society	Public	Medical Research	350
National Kidney Foundation of Michigan	Public	Medical Research	350
Medical Teams International	Public	Medical Research	500
OSHU Foundation - Alzheimers	Public	Medical Research	300
OSHU Foundation - Parkinsons	Public	Medical Research	500
Oral Hull Foundation for the Blind	Public	Medical Research	350
Providence St. Vincent Med. Foundation	Public	Medical Research	10,000
Shriner's Hospital	Public	Medical Research	500
St. Baldricks Foundation	Public	Medical Research	250
Corbett Education Foundation	Public	Educational	500
Gresham Barlow Foundation	Public	Educational	2,300
Portland Lutheran School	Public	Educational	1,000
Sandy High School - FFA	Public	Educational	300

J FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATIONS

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART XVI· LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
APLD Event Sponsor	Public	Horticultural Research	800
Acorn Outreach	Public	Horticultural Research	500
Alliance for Community Trees	Public	Horticultural Research	7,500
American In Bloom	Public	Horticultural Research	3,000
American Nursery & Landscape Assoc.	Public	Horticultural Research	2,500
American Society of Landscape Architects	Public	Horticultural Research	5,000
Arbor Day Foundation	Public	Horticultural Research	100
Arnold Arboretum	Public	Horticultural Research	500
Bernheim Arboretum	Public	Horticultural Research	500
Berry Botanic Garden	Public	Horticultural Research	1,000
Chemeketa Community College	Public	Horticultural Research	2,000
Clackamas Community College	Public	Horticultural Research	2,000
Colorado Nursery Res & Educacation Found.	Public	Horticultural Research	300
Colorado State University	Public	Horticultural Research	4,000
Connecticut Agri. Experiment Station	Public	Horticultural Research	2,000
Friends of Trees	Public	Horticultural Research	12,000
Holden Arboretum	Public	Horticultural Research	500
Hoyt Arboretum	Public	Horticultural Research	4,000
HRI JFS Grant	Public	Horticultural Research	2,000
Indiana Nursery Endowment Fund	Public	Horticultural Research	250
International Plant Propagators Society	Public	Horticultural Research	250
Kansas State University	Public	Horticultural Research	3,000
Landscape Plant Development Center	Public	Horticultural Research	10,000
Leach Botanical Garden	Public	Horticultural Research	500
MHCC Scholarship Fund	Public	Horticultural Research	2,000
Michigan State University	Public	Horticultural Research	6,000
Missouri Botanical Garden	Public	Horticultural Research	500
Missouri Landscape & Nursery Foundation	Public	Horticultural Research	500
Morton Arboretum	Public	Horticultural Research	11,000
New York Restoration Project	Public	Horticultural Research	12,000
North Carolina State University	Public	Horticultural Research	14,500

J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION

93-1265440

FORM 990-PF - RETURN OF PRIVATE FOUNDATIONS

FISCAL YEAR ENDED SEPTEMBER 30, 2009

PART XVI: LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OAN	Public	Horticultural Research	3,000
Ohio State University	Public	Horticultural Research	5,000
Oregon Ag Fest	Public	Horticultural Research	250
Oregon State University	Public	Horticultural Research	38,595
Paul Ciener Botanical Garden	Public	Horticultural Research	3,000
Texas A & M University	Public	Horticultural Research	8,000
University of Arkansas	Public	Horticultural Research	5,000
University of Florida	Public	Horticultural Research	5,000
University of Minnesota	Public	Horticultural Research	5,000
Urban Forest Foundation	Public	Horticultural Research	500
U.S.D.A.	Public	Horticultural Research	26,500
U.S. National Arboretum	Public	Horticultural Research	500
Washington State University	Public	Horticultural Research	3,000
Yew Dell Gardens	Public	Horticultural Research	1,000
Total (See Part SV, Line 3a)			$ 269,995

- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box . ▶ ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print File by the extended due date for filing the return. See instructions	Name of Exempt Organization J. FRANK SCHMIDT FAMILY CHARITABLE FOUNDATION	**Employer identification number** 93-1265440
	Number, street, and room or suite no. If a P.O. box, see instructions. PO BOX 189	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BORING OR 97009	

Check type of return to be filed (File a separate application for each return):

☐ Form 990	☒ Form 990-PF	☐ Form 1041-A	☐ Form 6069
☐ Form 990-BL	☐ Form 990-T (sec. 401(a) or 408(a) trust)	☐ Form 4720	☐ Form 8870
☐ Form 990-EZ	☐ Form 990-T (trust other than above)	☐ Form 5227	

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

- The books are in the care of ▶ JAN BARKLEY
  Telephone No. ▶ 503-663-4128 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ________ . If this is for the whole group, check this box . . . . . . ▶ ☐ . If it is for part of the group, check this box. . . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until 08/15, 2010.

5 For calendar year ______, or other tax year beginning 10/1, 2008, and ending 9/30, 2009.

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension TAXPAYER REQUEST ADDITIONAL TIME TO FILE IN ORDER TO GATHER ADDITIONAL DOCUMENTATION.

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	$
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	$
c	**Balance Due.** Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	$ 0.00

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ Mary E. P— Title ▶ CPA Date ▶ 05/14/10