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

2008

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

For calendar year 2008, or tax year beginning NOV 1, 2008, and ending OCT 31, 2009

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

Name of foundation

The Bennie & Martha Benjamin
Foundation, Inc

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

c/o David A Beale, 355 NE 5th Avenue

Room/suite

1

City or town, state, and ZIP code

Delray Beach, FL 33483

A Employer identification number

13-3555717

B Telephone number

561-243-1477

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 foundationI Fair market value of all assets at end of year
(from Part II, col. (c), line 16)

\$ 2,019,398. (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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	21,722.	21,722.		Statement 1
4	Dividends and interest from securities	9,790.	9,790.		Statement 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,473.			
b	Gross sales price for all assets on line 6a	590,918.			
7	Capital gain net income (from Part IV, line 2)		1,473.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	153,970.	146,038.		Statement 3
12	Total. Add lines 1 through 11	186,955.	179,023.		
13	Compensation of officers, directors, trustees, etc.	62,100.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees Stmt 4	2,379.	2,379.		0.
b	Accounting fees Stmt 5	4,000.	2,000.		2,000.
c	Other professional fees Stmt 6	25,344.	23,470.		1,874.
17	Interest				
18	Taxes				
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	6,771.	0.		6,771.
22	Printing and publications				
23	Other expenses Stmt 7	10,797.	6,466.		3,331.
24	Total operating and administrative expenses. Add lines 13 through 23	111,391.	34,315.		13,976.
25	Contributions, gifts, grants paid	197,693.			197,693.
26	Total expenses and disbursements. Add lines 24 and 25	309,084.	34,315.		211,669.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<122,129.>			
b	Net investment income (if negative, enter -0-)		144,708.		
c	Adjusted net income (if negative, enter -0-)			N/A	

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Form 990-PF (2008)

**The Bennie & Martha Benjamin
Foundation, Inc**

13-3555717

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	84,703.	64,100.	64,100.
	2	Savings and temporary cash investments	607,471.	894,252.	894,252.
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations Stmt 9	574,622.	250,415.	261,835.
	b	Investments - corporate stock Stmt 10	130,465.	111,722.	166,211.
	c	Investments - corporate bonds Stmt 11	48,357.	0.	0.
Liabilities	11	Investments - land, buildings, and equipment basis ▶ 220,000.			
		Less accumulated depreciation ▶	220,000.	220,000.	220,000.
	12	Investments - mortgage loans Stmt 12	125,000.	125,000.	125,000.
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation ▶			
	15	Other assets (describe ▶ <u>Closely Held Stock</u>)	288,000.	288,000.	288,000.
	16	Total assets (to be completed by all filers)	2,078,618.	1,953,489.	2,019,398.
	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			
	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 ▶ <input type="checkbox"/>			
		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 ▶ <input checked="" type="checkbox"/>			
		and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds	2,078,618.	1,953,489.	
	30	Total net assets or fund balances	2,078,618.	1,953,489.	
	31	Total liabilities and net assets/fund balances	2,078,618.	1,953,489.	

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	2,078,618.
2	Enter amount from Part I, line 27a	2	<122,129.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,956,489.
5	Decreases not included in line 2 (itemize) ▶ Federal Taxes Paid	5	3,000.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,953,489.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b See Attached Statement			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 590,918.		589,445.	1,473.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			1,473.

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	1,473.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007	214,822.	2,196,085.	.097820
2006	187,409.	2,256,804.	.083042
2005	263,745.	2,305,005.	.114423
2004	198,092.	2,338,220.	.084719
2003	174,671.	2,438,640.	.071626

2 Total of line 1, column (d)	2	.451630
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	.090326
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	2,021,508.
5 Multiply line 4 by line 3	5	182,595.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,447.
7 Add lines 5 and 6	7	184,042.
8 Enter qualifying distributions from Part XII, line 4	8	211,669.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,447.
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	0.
3 Add lines 1 and 2		3	1,447.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	1,447.
6 Credits/Payments:			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a	3,064.	
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	3,064.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	10.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,607.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax <input checked="" type="checkbox"/> 1,607. Refunded <input checked="" type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> NY		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Foundation, Inc**

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>bennieandmartha.org</u>	13	X	
14	The books are in care of ► <u>David A Beale</u> Telephone no. ► <u>561-243-1477</u> Located at ► <u>355 NE 5th Avenue #1, Delray Beach, FL</u> ZIP+4 ► <u>33483</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	<input type="checkbox"/> 15 N/A		

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? If "Yes," list the years ► _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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

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

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

☐ Yes
☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes
☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes
☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes
☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes
☒ No

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

N/A

☒

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes
☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes
☒ No

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

☐ Yes
☒ No

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes
☒ No

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

N/A

☐ Yes
☐ No

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Jack N Albert	Director			
7500 Bondsberry Court				
Boca Raton, FL 33434	5.00	17,950.	0.	0.
David A Beale	Director			
11894 Island Lake Lane				
Boca Raton, FL 33498	5.00	29,700.	0.	0.
Seymour Braun, Esq.	Director			
110 East 59th Street, S-3201				
New York, NY 10022	5.00	14,450.	0.	0.

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

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

Total number of other employees paid over \$50,000 0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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

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 instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	524,175.
b	Average of monthly cash balances	1b	895,117.
c	Fair market value of all other assets	1c	633,000.
d	Total (add lines 1a, b, and c)	1d	2,052,292.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,052,292.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	30,784.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,021,508.
6	Minimum investment return. Enter 5% of line 5	6	101,075.

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

1	Minimum investment return from Part X, line 6	1	101,075.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	1,447.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,447.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	99,628.
4	Recoveries of amounts treated as qualifying distributions	4	21,121.
5	Add lines 3 and 4	5	120,749.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	120,749.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	211,669.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	211,669.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1,447.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	210,222.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				120,749.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003	56,541.			
b From 2004	86,817.			
c From 2005	153,819.			
d From 2006	78,763.			
e From 2007	92,986.			
f Total of lines 3a through e	468,926.			
4 Qualifying distributions for 2008 from Part XII, line 4: ► \$ 211,669.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				120,749.
e Remaining amount distributed out of corpus	90,920.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	559,846.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	56,541.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	503,305.			
10 Analysis of line 9:				
a Excess from 2004	86,817.			
b Excess from 2005	153,819.			
c Excess from 2006	78,763.			
d Excess from 2007	92,986.			
e Excess from 2008	90,920.			

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

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

None

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

None

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

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

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

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
See Statement 13				
Total			▶ 3a	197,693.
b <i>Approved for future payment</i>				
None				
Total			▶ 3b	0.

Enter gross amounts unless otherwise indicated.

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

Form **990-PF** (2008)

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 | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | 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. | | |

[illegible]

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

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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.

Sign Here

Signature of officer or trustee

Date _____

Title

Secretary & Executive
Director

Preparer's
signature

Firm's name (or yours if self-employed), address, and ZIP code **Elizabeth A Dunn, CPA, PA
1001 Yamato Road #100
Boca Raton, FL 33431**

Date _____

09/12/10

☐ Check if self-employed

Preparer's identifying number

EIN ▶

Phone no. 561-391-1120

Form **990-PF** (2008)

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 US Treasury Notes 11/15/2008		P	04/15/03	11/15/08
b Praxair Inc		P	01/06/04	11/28/08
c Chase Manhattan 1/15/2009		P	06/19/97	01/15/09
d Cameron International Corp		P	01/31/05	02/19/09
e US Treasury Notes 02/28/2009		P	05/23/07	02/28/09
f US Treasury Notes 04/15/2009		P	01/31/05	04/15/09
g US Treasury Notes 04/15/2009		P	02/22/05	04/15/09
h GNMA Pool		P	Various	Various
i US Treasury Bill 12/18/2008		P	06/26/08	12/28/08
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 100,000.		108,029.	<8,029.>
b 11,588.		7,594.	3,994.
c 50,000.		48,358.	1,642.
d 16,235.		16,054.	181.
e 100,000.		100,005.	<5.>
f 50,000.		49,288.	712.
g 50,000.		49,040.	960.
h 13,095.		12,939.	156.
i 200,000.		198,138.	1,862.
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<8,029.>
b			3,994.
c			1,642.
d			181.
e			<5.>
f			712.
g			960.
h			156.
i			1,862.
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	1,473.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

Source	Amount
Audrey Bacchus	384.
UBS/Paine Webber	21,125.
Virginia P Anthony	213.
Total to Form 990-PF, Part I, line 3, Column A	21,722.

Form 990-PF Dividends and Interest from Securities Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
UBS/Paine Webber	9,790.	0.	9,790.
Total to Fm 990-PF, Part I, ln 4	9,790.	0.	9,790.

Form 990-PF Other Income Statement 3

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Royalties	146,038.	146,038.	
Individuals Return of Grants Rescinded Various	7,932.	0.	
Total to Form 990-PF, Part I, line 11	153,970.	146,038.	

Form 990-PF Legal Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal Fees	2,379.	2,379.		0.
To Fm 990-PF, Pg 1, ln 16a	2,379.	2,379.		0.

Form 990-PF	Accounting Fees			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Accounting Fees	4,000.	2,000.		2,000.	
To Form 990-PF, Pg 1, ln 16b	4,000.	2,000.		2,000.	

Form 990-PF	Other Professional Fees			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Professional Secretary	18,735.	16,861.		1,874.	
Investment Managment Fees	6,609.	6,609.		0.	
To Form 990-PF, Pg 1, ln 16c	25,344.	23,470.		1,874.	

Form 990-PF	Other Expenses			Statement	7
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Bank Service Charges	216.	216.		0.	
Admin & Operating Expenses	10,331.	6,000.		3,331.	
Licenses & Fees	250.	250.		0.	
To Form 990-PF, Pg 1, ln 23	10,797.	6,466.		3,331.	

Footnotes				Statement	8
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Form 990-PF	U.S. and State/City Government Obligations		Statement	9
Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
	X		250,415.	261,835.
Total U.S. Government Obligations			250,415.	261,835.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			250,415.	261,835.

Form 990-PF	Corporate Stock		Statement	10
Description			Book Value	Fair Market Value
			111,722.	166,211.
Total to Form 990-PF, Part II, line 10b			111,722.	166,211.

Form 990-PF	Corporate Bonds		Statement	11
Description			Book Value	Fair Market Value
			0.	0.
Total to Form 990-PF, Part II, line 10c			0.	0.

Form 990-PF	Mortgage Loans		Statement	12
Description			Book Value	Fair Market Value
Mortgage Receivable			125,000.	125,000.
Total to Form 990-PF, Part II, line 12			125,000.	125,000.

Form 990-PF	Grants and Contributions Paid During the Year	Statement 13
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Recipient Name and Address	Recipient Relationship and Purpose of Grant	Recipient Status	Amount
Candelis Inc, 18821 Bardeen Avenue, Irvine, CA 92612	None Contribution - Cardiac Center	Public- Medical	10,414.
Cherian Joseph-Jnofinn, #2U Whites Bay, Fredriksted, VI 00840	None Grant	Individual/ Student	6,488.
Dawn Grell, Estate Brookman JA22, St Thomas, VI 00802	None Grant	Individual/ Student	1,443.
Gov Juan F Luis Hospital, 4007 Estate Diamond Ruby, Christiansted, VI 00820	None Contribution - Cardiac Center (2 installments)	Public - Medical	65,761.
JudyAnne T Ross,	None Grant	Individual/ Student	3,840.
Regis University, 3333 Regis Blvd, Denver, CO 80221	None Contribution	Public- Medical	1,443.
Roy L Schneider Hospital, 9048 Sugar Estate, St Thomas, VI 00802	None Nursing Program, Computer Lab	Public- Medical	55,225.
South Coast Training, LLC, 69 Main Street, Fairhaven, MA 02719	None Contribution	Public - Medical	8,189.

The Bennie & Martha Benjamin Foundation,

13-3555717

St Croix Benjamin School Program, Inc 4007 Estate Diamond Ruby, Christiansted, V.I. 00823	None Contribution - Cardiac Center	Public - Medical	10,414.
Stony Brook University School of Medicine Nicolls Road & Health Sciences Dr, Stony Brook, NY 11794	None Scholarship	Public- Education	11,381.
Ten Thousand Helpers 61-A Hospital Street Frederiksted, St Croix, VI 00802	None Contribution- Rainbow House Project, Run for Respect	Public	8,300.
The Ascap Foundation One Lincoln Plaza, New York, NY 10023	None Contribution	Public	500.
University of Massachusetts, 300 Massachusetts Ave, Amherst, MA 01003	None Scholarship	Public - Education	2,295.
University of Virgin Islands, RR 1, Box 10000 Kingshill, St Croix, VI 00802	None Scholarship	Public- Education	12,000.
Total to Form 990-PF, Part XV, line 3a			<u>197,693.</u>

Portfolio Summary

BENNIE & MARTHA BENJAMIN FOUNDATION
TN8-578652
October 31, 2009

	<u>MARKET VALUE</u>	<u>% OF TOTAL</u>	<u>ANNUAL INCOME</u>	<u>CURRENT YIELD</u>
CASH & EQUIVALENTS	894,252	67.6	3,577	0.4
FIXED INCOME	308,635	23.3	15,795	5.1
EQUITY	119,411	9.0	2,786	2.3
TOTAL ASSETS	<u>1,322,298</u>	<u>100.0</u>	<u>22,158</u>	<u>1.7</u>
ACCRUED INCOME	4,667			
TOTAL ASSETS PLUS ACCRUED INCOME	<u>1,326,965</u>	<u>100.0</u>	<u>22,158</u>	

Sector Analysis of Equities

BENNIE & MARTHA BENJAMIN FOUNDATION

TN8-578652

October 31, 2009

	<u>TOTAL COST</u>	<u>MARKET VALUE</u>	<u>% OF EQUITIES</u>	<u>ANNUAL INCOME</u>	<u>CURRENT YIELD</u>
EQUITIES					
CONSUMER STAPLES	5,288	23,200	19.4	704	3.0
HEALTHCARE	13,089	14,504	12.1	392	2.7
FINANCIALS	9,510	11,235	9.4	42	0.4
ENERGY	19,161	38,118	31.9	744	2.0
TRANSPORTATION	10,455	13,986	11.7	408	2.9
CAPITAL GOODS	5,819	18,368	15.4	496	2.7
TOTAL EQUITIES	<u><u>63,322</u></u>	<u><u>119,411</u></u>	<u><u>100.0</u></u>	<u><u>2,786</u></u>	<u><u>2.3</u></u>

Portfolio Valuation

BENNIE & MARTHA BENJAMIN FOUNDATION
TN8-578652
October 31, 2009

		COST		MARKET VALUE		UNREAL G/L	IND. ANN INCOME	CURR YIELD
		UNIT	TOTAL	UNIT	TOTAL			
CASH & EQUIVALENTS	MONEY MARKET FUND		894,252		894,252	0	3,577	0.4
	FIXED INCOME							
GOVERNMENT OBLIGATIONS								
100,000	U S TREASURY NOTES 4.625% 11/15/09	99.91	99,906	100.15	100,152	247	4,625	4.6
100,000	U S TREASURY NOTES 4.500% 11/15/10	99.37	99,367	104.23	104,230	4,863	4,500	4.3
TOTAL			199,273		204,382	5,109	9,125	4.5
MORTGAGE BACKED SECURITIES								
713	GNMA POOL #268331 8.500% 06/15/18	99.90	713	112.75	804	92	61	7.5
915	GNMA POOL #1684 8.000% 09/20/21	100.01	915	113.25	1,036	121	73	7.1
4,852	GNMA POOL #430294 7.000% 10/15/27	75.76	3,676	110.37	5,355	1,679	340	6.3
5,899	GNMA POOL #2728 6.000% 03/20/29	54.15	3,194	107.48	6,340	3,146	354	5.6
342	GNMA POOL #2796 7.000% 08/20/29	85.02	291	109.70	376	84	24	6.4

ASCENSION ASSET MANAGEMENT, LLC.

Portfolio Valuation

BENNIE & MARTHA BENJAMIN FOUNDATION

TN8-578652

October 31, 2009

	COST		MARKET VALUE		UNREAL G/L	IND. ANN INCOME	CURR YIELD
	UNIT	TOTAL	UNIT	TOTAL			
3,453 GNMA POOL #3150 6.500% 10/20/31	106.44	3,675	108.26	3,738	63	224	6.0
2,610 GNMA POOL #569801 6.000% 05/15/32	94.78	2,474	107.30	2,800	327	157	5.6
2,296 GNMA POOL #3239 6.500% 05/20/32	105.37	2,419	107.86	2,477	57	149	6.0
4,982 GNMA POOL #3249 6.000% 06/20/32	104.79	5,221	107.44	5,353	132	299	5.6
2,524 GNMA POOL #3260 6.000% 07/20/32	95.05	2,399	107.44	2,712	313	151	5.6
24,640 GNMA POOL #3474 6.000% 11/20/33	106.19	26,165	107.39	26,462	297	1,478	5.6
TOTAL		51,142		57,453	6,310	3,310	5.8
MUTUAL FUNDS - FIXED INCOME							
MUTUAL FUNDS - FIXED INCOME							
4,000 ABERDEEN GLOBAL INCOME FD	12.10	48,400	11.70	46,800	-1,600	3,360	7.2
TOTAL FIXED INCOME		298,815		308,635	9,820	15,795	5.1
EQUITY							
CONSUMER STAPLES							
CONSUMER STAPLES							
400 PROCTER & GAMBLE CO	13.22	5,288	58.00	23,200	17,912	704	3.0

ASCENSION ASSET MANAGEMENT, LLC.

Portfolio Valuation

BENNIE & MARTHA BENJAMIN FOUNDATION

TN8-578652

October 31, 2009

	COST		MARKET VALUE		UNREAL G/L	IND. ANN INCOME	CURR YIELD
	UNIT	TOTAL	UNIT	TOTAL			
HEALTHCARE							
HEALTHCARE							
200 JOHNSON & JOHNSON CO	64.28	12,856	59.05	11,810	-1,046	392	3.3
48 MEDCO HEALTH SOLUTIONS INC	4.86	233	56.12	2,694	2,461	-	-
TOTAL HEALTHCARE		<u>13,089</u>		<u>14,504</u>	<u>1,415</u>	<u>392</u>	<u>2.7</u>
FINANCIALS							
FINANCIALS							
500 LEUCADIA NATL CORP	19.02	9,510	22.47	11,235	1,725	42	0.4
ENERGY							
ENERGY							
300 ENCAN CORP	19.08	5,723	55.39	16,617	10,895	240	1.4
300 EXXON MOBIL CORP	44.80	13,439	71.67	21,501	8,062	504	2.3
TOTAL ENERGY		<u>19,161</u>		<u>38,118</u>	<u>18,957</u>	<u>744</u>	<u>2.0</u>
TRANSPORTATION							
TRANSPORTATION							
300 NORFOLK SOUTHN CORP	34.85	10,455	46.62	13,986	3,531	408	2.9

ASCENSION ASSET MANAGEMENT, LLC.

Portfolio Valuation

BENNIE & MARTHA BENJAMIN FOUNDATION

TN8-578652

October 31, 2009

	COST		MARKET VALUE		UNREAL G/L	IND. ANN INCOME	CURR YIELD
	UNIT	TOTAL	UNIT	TOTAL			
<u>CAPITAL GOODS</u>							
CAPITAL GOODS							
400 ILLINOIS TOOL WORKS INC	14.55	5,819	45.92	18,368	12,549	496	2.7
TOTAL EQUITY		<u>63,322</u>		<u>119,411</u>	<u>56,089</u>	<u>2,786</u>	<u>2.3</u>
TOTAL ASSETS		<u>1,256,389</u>		<u>1,322,298</u>	<u>65,908</u>	<u>22,158</u>	<u>1.7</u>
ACCRUED INCOME				4,667			
TOTAL ASSETS PLUS ACCRUED INCOME		<u>1,256,389</u>		<u>1,326,965</u>		<u>22,158</u>	

CD = CALL DATE
PD = PRE DATE
PT = PUT DATE

ASCENSION ASSET MANAGEMENT, LLC.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**
- **Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.**
- **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 The Bennie & Martha Benjamin Foundation, Inc Number, street, and room or suite no. If a P.O. box, see instructions. c/o David A Beale, 355 NE 5th Avenue, No. 1 City, town or post office, state, and ZIP code. For a foreign address, see instructions. Delray Beach, FL 33483
	Employer identification number 13-3555717 For IRS use only

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

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

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

David A Beale

- The books are in the care of **355 NE 5th Avenue #1 - Delray Beach, FL 33483**
 Telephone No. **561-243-1477** 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 **September 15, 2010.**
- 5 For calendar year _____, or other tax year beginning **NOV 1, 2008**, and ending **OCT 31, 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
Certain information that is needed in order to file a complete and accurate income tax return is still not on hand.

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	\$	0.
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	\$	3,064.
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.

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 **ED Beale** Title **CRA** Date **6/14/10**

Form 8868 (Rev. 4-2009)