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

**2008**

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2008, or tax year beginning **OCT 1, 2009**, and ending **NOV 30, 2009**  
 G Check all that apply:  Initial return  Final return  Amended return  Address change  Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>THE JORDAN FOUNDATION</b> C/O JAMES L. JOSLIN Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>C/O TFC FINANCIAL MGMT., 30 FEDERAL ST.</b> City or town, state, and ZIP code <b>BOSTON, MA 02110</b>	A Employer identification number <b>04-3215547</b> B Telephone number <b>(617) 951-0770</b>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		C If exemption application is pending, check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 0.</b> J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)		

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))</small>	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>1</b> Contributions, gifts, grants, etc., received				
<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
<b>3</b> Interest on savings and temporary cash investments				
<b>4</b> Dividends and interest from securities	47.	47.		<b>STATEMENT 1</b>
<b>5a</b> Gross rents				
<b>b</b> Net rental income or (loss)				
<b>6a</b> Net gain or (loss) from sale of assets not on line 10	10,952.			
<b>b</b> Gross sales price for all assets on line 6a <b>57,152.</b>				
<b>7</b> Capital gain net income (from Part IV, line 2)		10,952.		
<b>8</b> Net short-term capital gain				
<b>9</b> Income modifications				
<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold				
<b>c</b> Gross profit or (loss)				
<b>11</b> Other income				
<b>12 Total</b> Add lines 1 through 11	10,999.	10,999.	0.	
<b>13</b> Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
<b>14</b> Other employee salaries and wages				
<b>15</b> Pension plans, employee benefits				
<b>16a</b> Legal fees				
<b>b</b> Accounting fees				
<b>c</b> Other professional fees	97.	97.	0.	0.
<b>17</b> Interest				
<b>18</b> Taxes				
<b>19</b> Depreciation and depletion				
<b>20</b> Occupancy				
<b>21</b> Travel, conferences, and meetings				
<b>22</b> Printing and publications				
<b>23</b> Other expenses				
<b>24 Total operating and administrative expenses</b> Add lines 13 through 23	97.	97.	0.	0.
<b>25</b> Contributions, gifts, grants paid	57,921.			57,921.
<b>26 Total expenses and disbursements</b> Add lines 24 and 25	58,018.	97.	0.	57,921.
<b>27 Subtract line 26 from line 12:</b>				
<b>a</b> Excess of revenue over expenses and disbursements	-47,019.			
<b>b</b> Net investment income (if negative, enter -0-)		10,902.		
<b>c</b> Adjusted net income (if negative, enter -0-)			0.	

CANNED MAR 31 2010  
 Operating and Administrative Expenses  
 RECEIVED STMT 2  
 MAR 29 2010  
 OGDEN, UT  
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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

	Beginning of year			End of year		
	(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>						
1 Cash - non-interest-bearing						
2 Savings and temporary cash investments						
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 <b>STMT 3</b>	1,517.	0.	0.			
b Investments - corporate stock						
c Investments - corporate bonds						
11 Investments - land, buildings, and equipment, basis ▶						
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other <b>STMT 4</b>	45,502.	0.	0.			
14 Land, buildings, and equipment, basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)						
<b>16 Total assets (to be completed by all filers)</b>	<b>47,019.</b>	<b>0.</b>	<b>0.</b>			
<b>Liabilities</b>						
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 ▶)						
<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>	<b>0.</b>			
<b>Net Assets or Fund Balances</b>						
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	660,000.	660,000.				
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.				
29 Retained earnings, accumulated income, endowment, or other funds	-612,981.	-660,000.				
<b>30 Total net assets or fund balances</b>	<b>47,019.</b>	<b>0.</b>	<b>0.</b>			
<b>31 Total liabilities and net assets/fund balances</b>	<b>47,019.</b>	<b>0.</b>	<b>0.</b>			

**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	47,019.
2 Enter amount from Part I, line 27a	2	-47,019.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	0.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	0.

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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	<b>SEE ATTACHED STATEMENT</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				
b				
c				
d				
e	57,152.	46,200.		10,952.
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) 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			10,952.	
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	10,952.
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	151,894.	126,563.	1.200145
2006	160,744.	203,779.	.788815
2005	57,000.	214,508.	.265724
2004	115,783.	209,590.	.552426
2003	107,420.	317,540.	.338288
2	Total of line 1, column (d)		3.145398
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		.629080
4	Enter the net value of noncharitable-use assets for 2008 from Part X, line 5		28,667.
5	Multiply line 4 by line 3		18,034.
6	Enter 1% of net investment income (1% of Part I, line 27b)		109.
7	Add lines 5 and 6		18,143.
8	Enter qualifying distributions from Part XII, line 4		57,921.

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.

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**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	109.
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	109.
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	109.
6	Credits/Payments:		
a	2008 estimated tax payments and 2007 overpayment credited to 2008	6a	174.
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	174.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	65.
11	Enter the amount of line 10 to be: Credited to 2009 estimated tax <input type="checkbox"/> 0. Refunded <input checked="" type="checkbox"/>	11	65.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		N/A
5	X	
6	X	
7	X	
8a		
8b	X	
9		X
10		X

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)			X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X		
14	The books are in care of ▶ JAMES JOSLIN, TFC FINANCIAL MGMT Telephone no. ▶ (617) 951-0770 Located at ▶ 30 FEDERAL STREET, BOSTON, MA ZIP+4 ▶ 02110			
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 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		
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? N/A		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A		
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		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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)?  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

b 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**

**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
BARBARA R. JORDAN 30 STANDISH RD WAYLAND, MA 01778	TRUSTEE 0.00	0.	0.	0.
GERALD REID JORDAN 27A KELLY COURT BRIGHTON, MA 02135	TRUSTEE 0.00	0.	0.	0.

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

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

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

**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	
<b>Total.</b> Add lines 1 through 3 <span style="float: right;">▶ 0.</span>	

**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	28,345.
b	Average of monthly cash balances	1b	759.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	29,104.
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	29,104.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	437.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	28,667.
6	Minimum investment return. Enter 5% of line 5 <b>ADJUSTED FOR SHORT TAX PERIOD</b>	6	240.

**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	240.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	109.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	109.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	131.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	131.
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	131.

**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	57,921.
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	57,921.
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	109.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	57,812.

**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				131.
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	91,967.			
b From 2004	105,737.			
c From 2005	46,517.			
d From 2006	151,067.			
e From 2007	145,778.			
f Total of lines 3a through e	541,066.			
4 Qualifying distributions for 2008 from Part XII, line 4: ▶ \$	57,921.			
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				131.
e Remaining amount distributed out of corpus	57,790.			
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:	598,856.			
a Corpus Add lines 3f, 4c and 4e Subtract line 5				
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	91,967.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	506,889.			
10 Analysis of line 9:				
a Excess from 2004	105,737.			
b Excess from 2005	46,517.			
c Excess from 2006	151,067.			
d Excess from 2007	145,778.			
e Excess from 2008	57,790.			

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**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				(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).)

**BARBARA R. JORDAN**

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:

**SEE STATEMENT 7**

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.

THE JORDAN FOUNDATION

Form 990-PF (2008)

C/O JAMES L. JOSLIN

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**Part XV** Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
VINEYARD HOUSE, INC, 15 CHURCH STREET UNIT D, VINEYARD HAVEN, MA 02568	NONE	PUBLIC CHARITY	CHARITABLE	921.
EMERALD NECKLACE CONSERVANCY INC, 891 CENTRE STREET, JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	CHARITABLE	500.
SUDBURY VALLEY TRUSTEES INC., 18 WOLBACH ROAD, SUDBURY, MA 01776	NONE	PUBLIC CHARITY	CHARITABLE	500.
THE HOLTON ARMS SCHOOL, 7303 RIVER ROAD, BETHESDA, MD 20817	NONE	PUBLIC CHARITY	CHARITABLE	1,000.
COMMUNITY SERVINGS INC, 18 MARBURY TERRACE, JAMAICA PLAIN, MA 02130	NONE	PUBLIC CHARITY	CHARITABLE	40,000.
MOTHER CAROLINE ACADEMY AND EDUCATION CENTER INC, 515 BLUE HILL AVENUE, DORC	NONE	PUBLIC CHARITY	CHARITABLE	5,000.
JAMES J DINEEN PARTNERSHIP IN PRIMARY CARE C/O MASS GENERAL HOSPITAL, DEVELO	NONE	PUBLIC CHARITY	CHARITABLE	10,000.
<b>Total</b>				<b>57,921.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>





**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 168.878 SH ALGER FD SMALL MID CAP GROWTH	P	11/19/08	11/09/09
b 1882.702 SH DFA IV DM INTL CORE EQUITY	P	12/11/09	11/09/09
c 304.878 SH DFA IV DM TX MNG US VAL FD	P	12/19/08	11/09/09
d 284.173 SH DFA IV DM TAX MGD US SM CAP VAL PORT	P	12/19/08	11/09/09
e 44.133 SH ROWE T PRICE INTL FDS INC INTL DISCOVER	P	05/29/09	11/09/09
f 70.429 SH TURNER FDS EMERGING GROWTH INST	P	06/10/02	11/09/09
g 121.396 SH VAN ECK FDS GLOBAL HARD ASSETS	P	12/11/08	11/09/09
h 654.662 SH VANGUARD INDEX TR LARGE CAP INDEX SIGN	P	11/07/08	11/09/09
i 189.694 SH VANGUARD INDEX TR GROWTH INDEX FUND	P	05/05/06	11/09/09
j COST BASIS ADJUSTMENT	P	10/21/01	11/09/09
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,047.		1,400.	647.
b 18,934.		13,960.	4,974.
c 3,637.		2,900.	737.
d 4,365.		3,580.	785.
e 1,604.		1,300.	304.
f 2,553.		3,228.	-675.
g 4,767.		3,200.	1,567.
h 14,011.		11,750.	2,261.
i 4,535.		4,882.	-347.
j 699.			699.
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			647.
b			4,974.
c			737.
d			785.
e			304.
f			-675.
g			1,567.
h			2,261.
i			-347.
j			699.
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	10,952.
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	DIVIDENDS AND INTEREST FROM SECURITIES		STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
NATIONAL ADVISORS TRUST	47.	0.	47.	
TOTAL TO FM 990-PF, PART I, LN 4	47.	0.	47.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TFC FINANCIAL MGMT, BOSTON, MA	93.	93.	0.	0.	
NAT'L ADVISORS TRUST, BOSTON, MA	4.	4.	0.	0.	
TO FORM 990-PF, PG 1, LN 16C	97.	97.	0.	0.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS		STATEMENT	3
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
MERRIMAC TREASURY FUND	X		0.	0.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			0.	0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	4
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
DOMESTIC EQUITIES	COST	0.	0.
INTERNATIONAL EQUITIES	COST	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 13		0.	0.

FORM 990-PF	STATEMENT CONCERNING LIQUIDATION, TERMINATION, ETC. - PART VII-A, LINE 5	STATEMENT	5
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EXPLANATION

ALL ASSETS OF THE FOUNDATION HAVE BEEN DISTRIBUTED TO ENTITIES WHICH QUALIFY UNDER SEC 501(C)(3) OF THE INTERNAL REVENUE CODE. SEE ACTION BY WRITTEN CONSENT OF THE TRUSTEES AND BOARD OF MANAGERS DATED 11-20-09

FORM 990-PF

DISSOLUTION STATEMENT

STATEMENT 6

NAME OF RECIPIENT

EMERALD NECKLACE CONSERVANCY INC

ADDRESS OF RECIPIENT

7303 RIVER ROAD  
DORCHESTER, MA 02121

FAIR MARKET VALUE  
OF ASSETS

500.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

SUDBURY VALLEY TRUSTEES INC

ADDRESS OF RECIPIENT

18 WOLBACH ROAD  
SUDBURY, MA 01776

FAIR MARKET VALUE  
OF ASSETS

500.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

THE HOLTON ARMS SCHOOL

ADDRESS OF RECIPIENT

7303 RIVER ROAD  
BETHESDA, MD 20817

FAIR MARKET VALUE  
OF ASSETS

1,000.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

COMMUNITY SERVINGS INC

ADDRESS OF RECIPIENT

18 MARBURY TERRACE  
JAMAICA PLAIN, MA 02130

FAIR MARKET VALUE  
OF ASSETS

40,000.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

MOTHER CAROLINE ACADEMY AND EDUCATION CENTER INC

ADDRESS OF RECIPIENT

515 BLUE HILL AVENUE  
DORCHESTER, MA 02121

FAIR MARKET VALUE  
OF ASSETS

5,000.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

VINEYARD HOUSE INC

ADDRESS OF RECIPIENT

15 CHURCH STREET UNIT D  
VINEYARD HAVEN, MA 02568

FAIR MARKET VALUE  
OF ASSETS

921.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

JAMES J DINEEN PARTNERSHIP IN PRIMARY CARE

ADDRESS OF RECIPIENT

7303 RIVER ROAD  
BOSTON, MA 02114

FAIR MARKET VALUE  
OF ASSETS

10,000.

EXPLANATION OF DISTRIBUTED ASSETS

CASH

NAME OF RECIPIENT

ADDRESS OF RECIPIENT

FAIR MARKET VALUE  
OF ASSETS

EXPLANATION OF DISTRIBUTED ASSETS

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 7

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BARBARA JORDAN, C/O JAMES L. JOSLIN, TFC FINANCIAL MANAGEMENT  
30 FEDERAL STREET  
BOSTON, MA 02110

TELEPHONE NUMBER

617-951-0770

FORM AND CONTENT OF APPLICATIONS

NO SPECIFIC APPLICATION FORM IS NECESSARY. COMPLETE INFORMATION ON THE CHARITABLE PURPOSE OF THE REQUEST IS REQUIRED.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NO RESTRICTIONS, EXCEPT IT MUST BE A TAX EXEMPT ORGANIZATION.

## THE JORDAN FOUNDATION

Action By Written Consent of the Trustee and Board of Managers

as of November 30, 2009

The undersigned, being trustees and members of the board of Managers of The Jordan Foundation (the "**Foundation**"), said Foundation having been created by Barbara Jordan and Gerald Reid Jordan by a Trust Agreement dated December 6, 1993, hereby adopts the following actions by written consent as of the date hereof:

### Liquidation and Dissolution of Foundation

VOTED: That it is in the best interests of the Foundation to liquidate and dissolve.

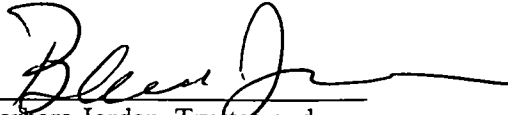
VOTED: That steps be taken accordingl to law to dissolve the Foundation, and to that end and purpose that the Foundation adopt the following as its Plan of Complete Liquidation and Dissolution ("the **Plan**"):

1. The Foundation will proceed to distribute all of its funds to entities qualified under Section 501(c)(3) of the Internal Revenue Code.
2. The Foundation will cease to carry on any business, except as may be necessary to properly wind up its affairs, will take the necessary steps to complete formal dissolution under the Massachusetts General Laws, including without limitation the filing of all Form PCs and any other forms or documents required by the Office of the Attorney General.
3. The trustees and members of the Board of Managers are authorized and empowered to take all steps necessary or appropriate to complete the liquidation of the Foundation as provided in this Plan.
4. All such distributions in liquidation and other steps set forth above to be performed by the Foundation shall be completed as soon as possible after the adoption of the Plan.

### Omnibus

VOTED: That the Trustees and Board of Managers of the Foundation be, and acting singly they hereby are, authorized, empowered and directed to execute and deliver all such agreements, certifications, instruments and other documents ant to take such other actions required by, contemplated by, related to or determined by any of them to be necessary or appropriate to carry out the purpose of the foregoing votes; and that the execution and delivery of any such agreement, certificate, instrument or other document, and that the taking of any such other action, by any of them, shall be conclusive evidence that the same was authorized and approved hereby and the taking of such actions prior to the date of this vote is hereby ratified and confirmed.

Witness my hand and seal as of the date first noted above.

x   
Barbara Jordan, Trustee and  
Member of Board of Managers

x   
Gerald Reid Jordan, Trustee and  
Member of Board of Managers