

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

Department Internal Re	nt of the Treasury evenue Service (77)	Note: The fo	ounda	tion may b	e able to use eporting requi	a copy o	f this retu	ırn t	o s	atısfy sta	te			•
	endar year 2008, or	tax year beginning	1	2/01	·	, and end	ting 1	1/	30)	2009	L	-	
G Che	ck all that apply	Initial return	Fina	al return	Amended	return	A	ddre	ess	change			ne change	
Use the IRS laborated of the I	The Wolco se, P.O. Box Denver, C		ound	ation				E	3	84-1 Telephone (303) 449- on application	e the 713	instructions) 3 0 pending, check h	nere 🏲 📗
H CI	neck type of organiz	vation: X Section	n 501	(c)(3) exer	mpt private fo	undation	<u></u> -	┦╹		_	ganizations, manizations		there ng the 85% test	check
) nonexempt charita			ther taxable p					here and	attach compu	utation	ı	▶
I Fa	ir market value of all ass om Part II, column (c), Ii	sets at end of year J		ounting m		ash	Accrual	_ E			foundation s tion 507(b)(1		was terminated check here	▶ □
(″ ► \$				Other (specif				. 🚽 F	•	If the four	ndation is in	a 60-r	month terminati	on _
Part	Analysis of I		art I,		f) must be on				Т		tion 507(b)(1			
	Expenses (The columns (b), (c), sarily equal the contractions (see the instruction)	he total of amounts i and (d) may not ne amounts in column (ions))	ces- a)	expense	venue and is per books		t investm income	nent			justed net		(d) Disburs for char purpo (cash bas	ritable oses
		fts, grants, etc, received (e foundn is not req to att				<u> </u>		1	-		*	-	*	
		e founds is not red to att avings and temporar							\dashv	<u></u>		-		
	cash investm	ents	•		318.			318						
ļ	4 Dividends and in 5a Gross rents	iterest from securities			23,414.		23,4	<u>4 1 4</u>	-			-+		
ļ	b Net rental incom- or (loss)	e		**			. ? ,	: , <u>\$</u>		10	jr.		* *	:
R	6a Net gain/(loss) fr	om sale of assets not on	line 10											
E	b Gross sales price assets on line 6a	<u> </u>			< 8	₩	* 🗱	,	-	*	<u> </u>	€· }	·	*
Ē	7 Capital gain net8 Net short-terr	income (from Part IV, line n capital gain	2)	RE	CEIVE			₹.,	-			-	3	-
N U	9 Income modif	fications	ے ا			- Q								
E	10 a Gross sales less returns and		25.	I MAF	0 2 201	10	\$	¥		*	3	~	•	
	allowances b Less: Cost of			F1 - '''	. 0 ~ 50;	1 2	*	- 	_		<u>\$0</u>			
	goods sold		1	00	DEN L									
	c Gross profit/(los		L			387 3	, , ,,, ,	* \$					₩ .	*
ĺ	11 Other income	e (attach schedule)							I			-	* 7	
	12 Total. Add Im	es 1 through 11			23,732.		23,	732				0.	*	
_	•	f officers, directors, truste	es, etc		33,300.				\Box					
		salaries and wages is, employee benefits								····				
A		h schedule) See S			7,478.	 			\dashv					7,478.
Ď	b Accounting fees				24,380.				7					24,380.
ı N	c Other prof fees ((attach sch)							_]					
PS	17 Interest18 Taxes (attach so	hedule). See Stm	+ 2		52. 10.			10	\dashv	···				52.
OPERAT	18 Taxes (attach sol		ור א		10.	 		10	<u>' · </u>					
i i i	sch) and dep	lètion	•	-					4					
Ň V G E	20 Occupancy 21 Travel, confe	rences, and meeting	ıs		25,281.				\dashv					25,281.
A E N X D P	22 Printing and	publications												
E	23 Other expens	ses (attach schedule) See Statemer			10,761.				1					LO,7 <u>61</u> .
N S	24 Total operation	ng and administrativ				 			+	/	 			10, 101.
S	expenses. Ad	dd lines 13 through 2	3		101,262.			10).					57 <u>,9</u> 52.
	25 Contributions, gi	ifts, grants paid es and disbursemer				 			-		<u>-</u>			
	Add lines 24	and 25	ı.S.		101,262.			10	<u>) .</u>			0.	(57,952.
		26 from line 12:												
	a Excess of rev and disburse	venue over expense ements	5		-77,53 0.				}					
	b Net investment i	ncome (if negative, enter	-0-)				23,	722	2.					
	C Adjusted net inc	ome (if negative, enter -0-	1	F		1			- 1			0.1		

Part	II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	f year
art		(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash'— non-interest-bearing			
	2,	Savings and temporary cash investments	51,138.	23,608.	23,608.
	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 the instructions).			
	7	Other notes and loans receivable (attach sch).			
Š		Less: allowance for doubtful accounts		<u> </u>	
A S E T	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
S	10a	a Investments – U.S. and state government obligations (attach schedule)			
		Investments — corporate stock (attach schedule)			
	(Investments — corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis		<u> </u>	,
		Less accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	Investments — other (attach schedule) Statement 5	500,000.	500,000.	525,935.
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
		/			
	10	Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	551,138.	523,608.	549,543.
Ŀ	17	Accounts payable and accrued expenses			.K
Å	18	Grants payable .			
A B	19	Deferred revenue			
Ľ	20	Loans from officers, directors, trustees, & other disqualified persons St 6	50,000.	100,000.	
Ţ	21	Mortgages and other notes payable (attach schedule)			
i	22	Other liabilities (describe			
_ <u>E</u> _ <u>S</u>	23	Total liabilities (add lines 17 through 22).	50,000.	100,000.	%
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
N F E U	24	Unrestricted			
E U	25	Temporarily restricted			
, D	26	Permanently restricted .			₹
A B A L A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
EL	27	Capital stock, trust principal, or current funds .			
5 N	28	Paid-in or capital surplus, or land, building, and equipment fund]
OE	29	Retained earnings, accumulated income, endowment, or other funds	501,138.	423,608.	
R S	30	Total net assets or fund balances (see the instructions)	501,138.	423,608.	
	31	Total liabilities and net assets/fund balances (see the instructions)	551,138.	523,60 <u>8</u> .	
Parl	- 111	Analysis of Changes in Net Assets or Fund Balance		323,000.	<u> </u>
1	Tota	I net assets or fund balances at beginning of year Part II, colum of year figure reported on prior year's return).	n (a), line 30 (must agre	e with	501,138.
2		er amount from Part I, line 27a		2	-77,530.
3		increases not included in line 2 (itemize)		3	1,555
4		lines 1, 2, and 3		4	423,608.
5		ases not included in line 2 (itemize)		5	
_6		I net assets or fund balances at end of year (line 4 minus line 5) -	- Part II, column (b), line	30 6	423,608.

	(a) List and describ	e the kind(s) of property sold (e g , rea se, or common stock, 200 shares MLC	l estate, (b) F	- Purchase	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
	a N/A		. ,,	- Donation		
	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 (e) plus (f) m	
	a					
t	b					
	<u>c</u>	 				
	d					
	Complete only for coasts above		10/21/60			
	(i) Fair Market Value	ring gain in column (h) and owned by the	(k) Excess of column (i)	na	l) Gains (Colu ain minus column (k	
	as of 12/31/69	as of 12/31/69	over column (j), if any		ın -0-) or Losses (fr	
	<u>a</u>	 				
	<u>b</u>					
	<u>с</u> d		<u> </u>			 -
	<u>e</u>					<u> </u>
3	If gain, also enter in Part I, lin in Part I, line 8	et capital loss) If gain, also e If (loss), enter (loss) as defined in sections 1222(5) are 8, column (c) (see the instructions) I er Section 4940(e) for Reduce	If (loss), enter -0-	3		
		lify under section 4940(e). Do not comp in each column for each year; see the		entries		X No
	(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(colu	(d) Distribution umn (b) divided	
_	2007	228,114.	539,7	54.		
	2006	236, 409.	556,5	46.		0.422626
	2005	194,533.				
	2004	231,000	616,9	58.		0.424779
_	2003	215,544.	803,9	56.		0.424779 0.315310 0.268104
				56.		0.422626 0.424779 0.315310 0.268104 0.121426
2	Total of line 1, column (d)	215,544.	803,9	56.		0.424779 0.315310 0.268104 0.121426
2	Average distribution ratio for t	215,544.	803, 9 965, 2 I on line 2 by 5, or by the	56. 54.		0.424779 0.315310 0.268104
_	Average distribution ratio for t number of years the foundation	215, 544. 117, 207.	803, 9 965, 2 If on line 2 by 5, or by the years.	56. 54.		0.424779 0.315310 0.268104 0.121426 1.552245 0.310449
3	Average distribution ratio for t number of years the foundatio	he 5-year base period – divide the tota n has been in existence if less than 5 y	803, 9 965, 2 If on line 2 by 5, or by the years.	56. 54. 2		0.424779 0.315310 0.268104 0.121426 1.552245 0.310449 537,318
3	Average distribution ratio for t number of years the foundatio Enter the net value of nonchar Multiply line 4 by line 3	he 5-year base period — divide the tota n has been in existence if less than 5 y	803, 9 965, 2 If on line 2 by 5, or by the years.	56. 54. 2 3		0.424779 0.315310 0.268104 0.121426 1.552245 0.310449 537,318
3 4 5	Average distribution ratio for the number of years the foundation. Enter the net value of noncharm. Multiply line 4 by line 3. Enter 1% of net investment in	he 5-year base period — divide the tota n has been in existence if less than 5 y	803, 9 965, 2 If on line 2 by 5, or by the years.	56. 54. 2 3 4		0.424779 0.315310 0.268104 0.121426 1.552245 0.310449 537,318
3 4 5 6	Average distribution ratio for the number of years the foundation. Enter the net value of noncharm. Multiply line 4 by line 3. Enter 1% of net investment in Add lines 5 and 6.	215, 544. 117, 207. the 5-year base period – divide the tota in has been in existence if less than 5 year table-use assets for 2008 from Part X, come (1% of Part I, line 27b)	803, 9 965, 2 If on line 2 by 5, or by the years.	56. 54. 2 3 4 5		0.424779 0.315310 0.268104 0.121426 1.552245

	990-PF (2008) The Wolcott Family Foundation 84-15/0/2		P	age 4
Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the instru	uctions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			
	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,		4	74.
	check here ☐ and enter 1% of Part I, line 27b			
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable	<u>. *</u>		
	foundations only Others enter -0-) . 2			0.
3	Add lines 1 and 2		4	74.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		4	74.
6	Credits/Payments:	2, . %	£ .	.
а	2008 estimated tax pmts and 2007 overpayment credited to 2008.		. 3	
ь	Exempt foreign organizations — tax withheld at source	*	1 2	4
С	Tax paid with application for extension of time to file (Form 8868)	1 1		1
d	Backup withholding erroneously withheld 6d 6d		<u> </u>	
7	Total credits and payments Add lines 6a through 6d			<u>0.</u>
8	Enter any penalty for underpayment of estimated tax. Check here 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		4	74.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11	Enter the amount of line 10 to be: Credited to 2009 estimated tax			
Pan	VII-A Statements Regarding Activities			
1 a	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?	<u></u>	Yes	No_X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		Х_
	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			Ü,
С	Did the foundation file Form 1120-POL for this year?	1 c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.	. 31		
_		O.	*	
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$\bigs\\$\$ \$ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	,	X
_	If 'Yes,' attach a detailed description of the activities	<u>-</u> ≫ %	N/ 8-1	
_	·			
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
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If 'Yes,' has it filed a tax return on Form 990-T for this year?	4b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
	If 'Yes,' attach the statement required by General Instruction T	5.678	,	San
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or			18.7
		*	I. I	. 35
	 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	Х	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X	
	Enter the states to which the foundation reports or with which it is registered (see the instructions)	2		
	СО			
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 <i>General Instruction G² If 'No,' attach explanation</i>	8b	Х	
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	9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		х
BAA	and addicesses	Form 9	90-PF	

	990-PF (2008) The Wolcott Family Foundation	84-157072	88	P	age 5
Par	t 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		<u>X</u>
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption	application?	13	_X	
	Website address ► www.WolfFoundation.org				
14		ne no 🕨 <u>(303)</u>	449	-713	<u> </u>
	Located at ► 4410 Arapahoe Avenue, Suite 135 Boulder CO ZIP + 4	► <u>803</u> 03	:=		-
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	- 1 1	N/A	•	
Dar	and enter the amount of tax-exempt interest received or accrued during the year t VII-B Statements Regarding Activities for Which Form 4720 May Be Required	▶ 15			N/A
Гаг	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1.8	During the year did the foundation (either directly or indirectly).		\vdash	163	140
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No		* « <u>*</u>	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			`~	
	disqualified person?	X Yes No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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 X 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 X No			
ŧ	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 the instructio	ns) ⁷	1 b		X
	Organizations relying on a current notice regarding disaster assistance check here	►	,) Î	
•	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?		1 c	- 101	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)):				
ā	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 X No			
	If 'Yes,' list the years ► 20 , 20 , 20 , 20				
ŀ	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a	a)(2) to	2b	N	/A
	all years listed, answer 'No' and attach statement — see the instructions) the the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years he	ore	20	: 10	/A
•	► 20, 20, 20	216			
3a	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X No		ı	
) }	
	o 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	İ			
	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	N	/A
A -				†	 -
48	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		Х
ŀ	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

BAA

Form **990-PF** (2008)

Form 990-PF (2008) The Wolcott Family			84-157	
Part VII-B Statements Regarding Activit	ies for Which Form	n 4720 May Be Re	quired (continued)	
5a During the year did the foundation pay or incur	•			
(1) Carry on propaganda, or otherwise attempt	to influence legislation	(section 4945(e))?	Yes X	No
(2) Influence the outcome of any specific public on, directly or indirectly, any voter registrat	c election (see section 4 ion drive?	955), or to carry	Yes X	No
(3) Provide a grant to an individual for travel,	study, or other similar pi	urposes?	Yes X	No
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section 4	an a charıtable, etc, org 1940(d)(2)? (see ınstruct	anization described tions)	Yes X	No
(5) Provide for any purpose other than religious educational purposes, or for the prevention	s, charitable, scientific, of cruelty to children or	literary, or animals?	Yes X	No
b If any answer is 'Yes' to 5a(1)-(5), did any of th described in Regulations section 53 4945 or in (see instructions)?	e transactions fail to qua current notice regarding	ralify under the exceptioning disaster assistance	าร	5b N/A
Organizations relying on a current notice regar	ding disaster assistance	check here	▶ 🗍	
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure respons	e foundation claim exen	nption from the	N/A Yes	No
If 'Yes,' attach the statement required by Regul	, -	5(d)		
6a Did the foundation, during the year, receive any on a personal benefit contract?	funds, directly or indire	ectly, to pay premiums	Yes X	
b Did the foundation, during the year, pay premiu	-	y, on a personal benefit	contract?	6b X
If you answered 'Yes' to 6b, also file Form 8870			, D, G	No Z
7a At any time during the tax year, was the foundation recover any presented				
b If yes, did the foundation receive any proceeds Part VIII Information About Officers, D	or have any net income	Foundation Mana	action?	
and Contractors			igers, riiginiy r ala	Employees,
1 List all officers, directors, trustees, foundation	managers and their co	mpensation (see instruc	tions).	
(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 Statement 7				
		33,300.	0.	0.
2 Compensation of five highest-paid employees	(other than those inclu	ded on line 1 – see instr	uctions). 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		00/10/00	>	0 Form 990-PF (2008)
BAA	TEEA0306L	U9/18/U8		rorm 330-PF (2008)

Form 990-PF (2008) The Wolcott Family Foundation	84-157	
Part VIII Information About Officers, Directors, Trustees, Fou and Contractors (continued)	ndation Managers, Highly Paid	Employees,
3 Five highest-paid independent contractors for professional services — (see in enter 'NONE.	nstructions). If 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	<u></u>	0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic organizations and other beneficiaries served, conferences convened, research papers produced, etc	al information such as the number of	Expenses
1 N/A		
'		
2		
3		
4		
Part IX-B Summary of Program-Related Investments (see insti	ructions)	
	<u> </u>	<u>.</u>
Describe the two largest program-related investments made by the foundation during	ng the tax year on lines 1 and 2	Amount
1 <u>N/A</u>		
		
2		
All other program-related investments See instructions.		
3		
	•	
Total Add lines 1 through 3	<u>-</u> 1	U

BAA

Form **990-PF** (2008)

Form 990-PF (2008) The Wolcott Family Foundation	84-1570728	
Part X Minimum Investment Return (All domestic foundations must complete this pa see instructions.)	rt. Foreign fou	ndations,
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	1 a	515,20
b Average of monthly cash balances	1b	30,30
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c).	1d	545,50
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		· · · · · · · · · · · · · · · · · · ·
(attach detailed explanation)	0.	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	545,50
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	8,18
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	537,31
6 Minimum investment return. Enter 5% of line 5.	6	26,86
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private and certain foreign organizations check here ► and do not complete the	operating foun is part.)	dations
1 Minimum investment return from Part X, line 6	1	26,86
2a Tax on investment income for 2008 from Part VI, line 5.	74.	
b Income tax for 2008 (This does not include the tax from Part VI) 2b		
c Add lines 2a and 2b	2c	47
3 Distributable amount before adjustments Subtract line 2c from line 1	3	26,39
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	26,39
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	26,39
Part XII Qualifying Distributions (see instructions)	3 ()	
1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes. a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	67,95
b Program-related investments — total from Part IX-B	1 b	
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	67,95
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 instructions)	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	67,95
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating when qualifies for the section 4940(e) reduction of tax in those years	<u></u>	
PAA		m 990-PF (

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,			*	26 302
2	Undistributed income, if any, as of the end of 2007.			* * * * * * * * * * * * * * * * * * *	26,392.
i	a Enter amount for 2007 only			0.	,
	b Total for prior years 20, 20, 20		0.	* ***	
3	Excess distributions carryover, if any, to 2008				
i	a From 2003 69, 480.) , ;			* ()
ı	From 2004 175, 970.	,		* * 4	
	From 2005 164,293.	2			
	d From 2006 209,138.	** ***	. ^		
	From 2007 199, 028.	1 1 3 4 YA.	` '\ \ \		
1	Total of lines 3a through e	817,909.			
4	Qualifying distributions for 2008 from Part				
	XII, line 4 ► \$67, 952.				
ě	Applied to 2007, but not more than line 2a	\$\tag{\frac{1}{2}}	14 /W , 74	0.	x. T., At F
ŀ	Applied to undistributed income of prior years				
	(Election required – see instructions)	,- <u></u>	0.		
•	Treated as distributions out of corpus				
	(Election required – see instructions)	0.	3007		
	Applied to 2008 distributable amount				26,392.
	Remaining amount distributed out of corpus	41,560.			
5	Excess distributions carryover applied to 2008 (If an amount appears in column (d), the	0.			0.
	same amount must be shown in column (a))				
6	Enter the net total of each column as				
	indicated below:				
â	a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	859,469.			
ł	Prior years' undistributed income. Subtract line 4b from line 2b		_		
			0.		
•	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.		
C	Subtract line 6c from line 6b Taxable	· :			
	amount — see instructions	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	0.	<u> </u>	* * * *
•	Undistributed income for 2007. Subtract line 4a from	, , , , , , , , , , , , , , , , , , , ,			` , , \$'
	line 2a Taxable amount — see instructions	",	**	0.	<u>'å</u>
f	Undistributed income for 2008 Subtract lines	y •	,		
	4d and 5 from line 1. This amount must be				
7	distributed in 2009	/		<u> </u>	0.
′	Amounts treated as distributions out of corpus to satisfy requirements imposed			*	
	by section 170(b)(1)(F) or 4942(g)(3)	0			
	(see instructions)	0.			
8	Excess distributions carryover from 2003 not	CO 400			
	applied on line 5 or line 7 (see instructions)	69,480.	- +		
9	Excess distributions carryover to 2009.	700 000			
10	Subtract lines 7 and 8 from line 6a	789,989.			
	Analysis of line 9: Excess from 2004 175, 970.				
	Excess from 2004 175, 970. 164, 293.				
	Excess from 2006 209, 138.				
	Excess from 2007 199, 028.				
e	Excess from 2008 41,560.				

is effective for 2008, enter the date of the i	etermination letter t	hat it is a private o	VII-A, question perating foundation,		N/A
	ruling			· •	
b Check box to indicate whether the foundation		ating foundation de		4942(j)(3) or	4942()(
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		
investment return from Part X for	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Tot
each year listed. b 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed			<u> </u>		 -
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					ı.
512(a)(5)), or royalties)		<u> </u>			
(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			Ì		
arr exempt organization					
(4) Gross investment income					
(4) Gross investment income Part XV Supplementary Information	n (Complete this	s part only if th	e organization	had \$5,000 or m	ore in
(4) Gross investment income Part XV Supplementary Information assets at any time during t	he year — see	s part only if th	e organization	had \$5,000 or m	ore in
(4) Gross investment income Part XV Supplementary Information assets at any time during to Information Regarding Foundation Manage a List any managers of the foundation who had	the year — see items: nave contributed mo	nstructions.) re than 2% of the to	otal contributions rec		
2art XV Supplementary Information assets at any time during to Information Regarding Foundation Managers of the foundation who have close of any tax year (but only if they have	the year — see items: nave contributed mo	nstructions.) re than 2% of the to	otal contributions rec		
(4) Gross investment income Part XV Supplementary Information assets at any time during to Information Regarding Foundation Manage a List any managers of the foundation who had	the year — see items: nave contributed mo	nstructions.) re than 2% of the to	otal contributions rec		
(4) Gross investment income Part XV Supplementary Information assets at any time during to a List any managers of the foundation who have close of any tax year (but only if they have See Statement 8	the year — see ers: nave contributed more the contributed more the	re than 2% of the to nan \$5,000) (See s	otal contributions rec ection 507(d)(2))	eived by the foundation	on before th
(4) Gross investment income Part XV Supplementary Information assets at any time during to a linformation Regarding Foundation Managera List any managers of the foundation who have close of any tax year (but only if they have	the year — see ers: have contributed more the contributed more the contributed more of	re than 2% of the to tan \$5,000) (See so	otal contributions rec ection 507(d)(2))	eived by the foundation	on before th
(4) Gross investment income Part XV Supplementary Information assets at any time during to assets at any time during to a List any managers of the foundation who is close of any tax year (but only if they have See Statement 8 b List any managers of the foundation who is a control of the founda	the year — see ers: have contributed more the contributed more the contributed more of	re than 2% of the to tan \$5,000) (See so	otal contributions rec ection 507(d)(2))	eived by the foundation	on before th
(4) Gross investment income Part XV Supplementary Information assets at any time during to assets at any time during to a List any managers of the foundation who have close of any tax year (but only if they have See Statement 8 b List any managers of the foundation who can partnership or other entity) of which the None	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10	re than 2% of the to lan \$5,000) (See so the stock of a corpo % or greater interes	otal contributions recelection 507(d)(2)) oration (or an equallist	eived by the foundation	on before th
2 Information Regarding Contribution, Grar	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 at, Gift, Loan, Schola	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest	otal contributions received to 507(d)(2)) pration (or an equally st	eived by the foundation	on before th
(4) Gross investment income Part XV Supplementary Information assets at any time during to a List any managers of the foundation who is close of any tax year (but only if they have see Statement 8 b List any managers of the foundation who is a partnership or other entity) of which the None 2 Information Regarding Contribution, Gran Check here	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 tt, Gift, Loan, Scholamakes contributions	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest rship, etc, Program to preselected char	otal contributions reception 507(d)(2)) oration (or an equally st	eived by the foundation of the and does not accept	on before the
(4) Gross investment income Part XV Supplementary Information assets at any time during to a List any managers of the foundation who is close of any tax year (but only if they have see Statement 8 b List any managers of the foundation who is a partnership or other entity) of which the None 2 Information Regarding Contribution, Grant Check here if the foundation only is requests for funds if the foundation makes complete items 2a, b, c, and d	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 makes contributions a gifts, grants, etc. (re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest arship, etc, Program to preselected char see instructions) to	otal contributions reception 507(d)(2)) pration (or an equally st itable organizations individuals or organ	eived by the foundation of the and does not accept	on before the
(4) Gross investment income Part XV Supplementary Information assets at any time during to a List any managers of the foundation who is close of any tax year (but only if they have see Statement 8 b List any managers of the foundation who is a partnership or other entity) of which the None Information Regarding Contribution, Grant Check here if the foundation only is requests for funds.	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 makes contributions a gifts, grants, etc. (re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest to preselected char- see instructions) to	otal contributions reception 507(d)(2)) pration (or an equally st itable organizations individuals or organ	eived by the foundation of the and does not accept	on before the
(4) Gross investment income Part XV Supplementary Information assets at any time during to assets at any time during to assets at any time during to a List any managers of the foundation who is close of any tax year (but only if they have See Statement 8 b List any managers of the foundation who is a partnership or other entity) of which the None Information Regarding Contribution, Grant Check here if the foundation only is requests for funds if the foundation makes complete items 2a, b, c, and did a The name, address, and telephone number	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 makes contributions a gifts, grants, etc. (re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest to preselected char- see instructions) to	otal contributions reception 507(d)(2)) pration (or an equally st itable organizations individuals or organ	eived by the foundation of the and does not accept	on before the
(4) Gross investment income Supplementary Information assets at any time during to a List any managers of the foundation who is close of any tax year (but only if they have see Statement 8 b List any managers of the foundation who is a partnership or other entity) of which the None 2 Information Regarding Contribution, Grand Check here if the foundation only is requests for funds if the foundation makes complete items 2a, b, c, and did a The name, address, and telephone number see Statement 9	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 makes contributions is gifts, grants, etc. (or of the person to we	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest rship, etc, Program to preselected char see instructions) to	otal contributions recection 507(d)(2)) Oration (or an equally st Intable organizations individuals or organizationly organizations)	erved by the foundation of the y large portion of the and does not accept sizations under other of	on before the
(4) Gross investment income Part XV Supplementary Information assets at any time during to a List any managers of the foundation who have see Statement 8 b List any managers of the foundation who can partnership or other entity) of which the None 2 Information Regarding Contribution, Grant Check here Information If the foundation only requests for funds If the foundation makes complete items 2a, b, c, and described a The name, address, and telephone numbers. See Statement 9 b The form in which applications should be seen asset to a supplementary in the form in which applications should be seen asset to a supplementary in the form in which applications should be seen asset to a supplementary in the form in which applications should be seen asset to a supplementary in the form in which applications should be seen as a supplementary in the form in which applications should be seen as a supplementary in the form in which applications should be seen as a supplementary in the form in which applications should be seen as a supplementary in the form in which applications should be seen as a supplementary in the form in which applications should be seen as a supplementary in the form in t	the year — see ers: have contributed more the contributed more the contributed more the contributed more of foundation has a 10 makes contributions is gifts, grants, etc., (or of the person to we submitted and informations.)	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest rship, etc, Program to preselected char see instructions) to	otal contributions recection 507(d)(2)) Oration (or an equally st Intable organizations individuals or organizationly organizations)	erved by the foundation of the y large portion of the and does not accept sizations under other of	on before the
(4) Gross investment income Part XV Supplementary Information assets at any time during to a List any managers of the foundation who have see of any tax year (but only if they have see Statement 8 b List any managers of the foundation who can partnership or other entity) of which the None 2 Information Regarding Contribution, Grant Check here if the foundation only if requests for funds of the foundation makes complete items 2a, b, c, and does a The name, address, and telephone number see Statement 9 b The form in which applications should be see Statement for Line 2a	the year — see ers: have contributed more the contributed more the contributed more the contributed more of foundation has a 10 makes contributions is gifts, grants, etc., (or of the person to we submitted and informations.)	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest rship, etc, Program to preselected char see instructions) to	otal contributions recection 507(d)(2)) oration (or an equally st intable organizations individuals or organization)	erved by the foundation of the y large portion of the and does not accept sizations under other of	on before the
art XV Supplementary Information assets at any time during to assets at any time during to a List any managers of the foundation who have close of any tax year (but only if they have See Statement 8 b List any managers of the foundation who can partnership or other entity) of which the None 2 Information Regarding Contribution, Grant Check here If the foundation only is requests for funds If the foundation makes complete items 2a, b, c, and described a The name, address, and telephone number See Statement 9 b The form in which applications should be see Statement for Line 2a can apply and the supplications and the supplications are supplied to the see Statement for Line 2a can submission deadlines.	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 makes contributions is gifts, grants, etc. (or of the person to we submitted and information in the contributions is gifts, grants, etc.)	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest rship, etc, Program to preselected char see instructions) to	otal contributions recection 507(d)(2)) oration (or an equally st intable organizations individuals or organization)	erved by the foundation of the y large portion of the and does not accept sizations under other of	on before the
(4) Gross investment income art XV Supplementary Information assets at any time during to a List any managers of the foundation who have see of any tax year (but only if they have see Statement 8 b List any managers of the foundation who can partnership or other entity) of which the None 2 Information Regarding Contribution, Grant Check here Information only if the foundation only if requests for funds of the foundation makes complete items 2a, b, c, and does a The name, address, and telephone numbers. See Statement 9 b The form in which applications should be see Statement for Line 2a	the year — see ers: have contributed more the contributed more the contributed more of foundation has a 10 or, Gift, Loan, Scholar makes contributions is gifts, grants, etc. (or of the person to we submitted and inform	re than 2% of the to than \$5,000) (See so the stock of a corpo % or greater interest rship, etc, Program to preselected char see instructions) to from applications sh	otal contributions recection 507(d)(2)) oration (or an equally st intable organizations individuals or organization or organizations and the step should include states.	erved by the foundation of the year portion of the and does not accept it is at least one of the received by the foundation of the received by the foundation of the received by the foundation of the foundation	on before the ownership of the ownership

3 Grants and Contributions Paid During the Yea	or Approved for Futur	e 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)	substantial contributor	recipient	CONTRIBUTION	
Name and address (home or business) a Paid during the year	śubstantial contributor	recipient		
Total	, , , , , , , , , , , , , , , , , , , 		▶ 3	a
b Approved for future payment Total			→ 3	

Part XVI-A Analysis of Income-Producing Activities

					 	
	s amounts unless otherwise indicated •	(a) Business code	d business income (b) Amount	(c) Exclu- sion	i by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Progr	ram service revenue.	ļi		code		(see the instructions)
_						
				 		
		 		 		
e		 				
a Fees	and contracts from government agencies	1				
-	bership dues and assessments .					
	st on savings and temporary cash investments	·		14	318.	
	ends and interest from securities			14	23,414.	
	ental income or (loss) from real estate	A 1651 18 Y		1		
	-financed property					
b Not d	lebt-financed property					
6 Net re	ntal income or (loss) from personal property					
7 Other	r investment income					
8 Gain o	r (loss) from sales of assets other than inventory					
9 Net 11	ncome or (loss) from special events					
10 Gross	s profit or (loss) from sales of inventory					CALLES CONTRACTOR OF THE PROPERTY OF THE PROPE
11 Other	r revenue.			3.000		
a				-		
						
		1 1		-		
d				ļ		
e	-A-) A-d	## N.5°, ##	· · · · · · · · · · · · · · · · · · ·		23,732.	
				* ***********	! /) . /) /	1
	otal. Add columns (b), (d), and (e)	(A) *** / ·				22 722
13 Total	I. Add line 12, columns (b), (d), and (e)			1-	13	23,732.
13 Total See works	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify community	calculations.)			13	23,732.
13 Total See works	I. Add line 12, columns (b), (d), and (e)	calculations.)	lishment of Exen		13	23,732.
13 Total See works	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify community	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	
13 Total See works Part XVI Line No.	Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify care. Relationship of Activities to t	calculations.)		npt Pur	poses	y to the e instructions)

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

descr	ne organization directly on tibed in section 501(c) of ng to political organizati	the Code (othe	gage in any of the for than section 501(ollowing with a c)(3) organizat	ny other or ions) or in	rganızatıon section 527,			Yes	No
a Trans	sfers from the reporting t	foundation to a	noncharitable exen	npt organizatio	n of					
	(1) Cash						1a(1)		X	
(2)	Other assets							1a (2)		X
b Other	r transactions:									
(1) 5	Sales of assets to a nonc	haritable exem	pt organization					1 b (1)		X
(2) F	(2) Purchases of assets from a noncharitable exempt organization						1 b (2)		X	
(3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements.							1 b (3)		X	
							1 b (4)		X	
(5) Loans or loan guarantees						1 b (5)		X		
(6) F	Performance of services	or membership	or fundraising solic	ritations				1 b (6)		Χ
	ing of facilities, equipme		_		;			1c		X
			•							
the g	answer to any of the ab oods, other assets, or se ransaction or sharing ar	ervices given by	the reporting found	dation If the fo	undation r	eceived less	than fair marke	et value in	f	
(a) Line no	(b) Amount involved		f noncharitable exempt o				fers, transactions,		ngement	s
I/A						.				
	·									
			<u> </u>							
		 								
	<u> </u>	L	<u> </u>							
desc	e foundation directly or it ribed in section 501(c) o es,' complete the following	f the Code (oth	ted with, or related t er than section 501(to, one or more (c)(3)) or in sec	tax-exem tion 527?	pt organizati	ons	Yes	X	No
DH 10	(a) Name of organizati	-	(b) Type of	organization		(c) Description of	f relationshin		
I/A	(a) Name of organizati	-	(2) 1) po of	organization			, Description e	TOTALIONISIND		
.,										
· · · · · · · · · · · · · · · · · · ·							·			
										
Under pena	alties of periury. I declare that I hav	e examined this return	n. including accompanying s	chedules and stateme	ents, and to the	best of my knowle	edge and belief, it is to	rue, correct, and		
complete	alties of perjury, I declare that I hav Declaration of preparer (other	r than taxpayer or t	iduciary) is based on all	information of white	ch preparer h	ias any knowled	ge			
	10000	John O	(A)		۱۵.					
/	When	Marc	en		人・2	-3-10	► <u>Treasu</u>	rer		
Sig	nature of officer or trustee				Date		Title			
	Outrous I i	1-1		A	Date		Check if	Preparer's Identif	lying nui	nber
Paid	Preparer's signature	144		0.	2/1	1/10	self-	P0011738		uaj
Pre- parer's	Entrary Dudi	sill, Gar	dner and Zer	man, P.C.		1/10	employed ► 27-	1478330		
Use	Lyours of colf 's						EIN ► 2/-	1410330		
Only	address, and David	der, CO 8	e Avenue, Su:	TCE 132			D	(303) 449	71	30
	ZIP code BOUL	uer, co e	10303				Phone no			
BAA								Form 9	コリーピト	(ZUUS)

2008	Federal Statements	Page 1		
Client WOLCOTPF	The Wolcott Family Foundation	84-1570728		
2/11/10		09·55AM		
Statement 1 Form 990-PF, Part I, Line 16a Legal Fees				
Sherman & Howard, LLC-general	(a) (b) Net (c) Expenses Investment Adjusted Per Books Income Net Income support \$ 7,478. Total \$ 7,478. \$ 0. \$ 0.	(d) Charitable Purposes \$ 7,478. \$ 7,478.		
Statement 2 Form 990-PF, Part I, Line 16b Accounting Fees				
Gardner and Zeman, P.CForm	(a) (b) Net (c) Expenses Investment Adjusted Net Income n 990PF, PLR \$ 24,380. Total \$ 24,380. \$ 0. \$ 0.	(d) Charitable Purposes \$ 24,380. \$ 24,380.		
Statement 3 Form 990-PF, Part I, Line 18 Taxes				
Federal excise tax-FY 2008	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income Total \$\frac{10}{5}\$ 10. \$\frac{10}{5}\$ 10. \$\frac{5}{5}\$ 0.	(d) Charitable Purposes \$ 0.		
Statement 4 Form 990-PF, Part I, Line 23 Other Expenses				
Postage Private letter ruling fees Supplies	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 105. 8,700. 1,956. Total \$ 10,761. \$ 0. \$ 0.	(d) Charitable Purposes \$ 105. 8,700. 1,956. \$ 10,761.		

2008 **Federal Statements** Page 2 Client WOLCOTPF 84-1570728 The Wolcott Family Foundation 2/11/10 09 55AM Statement 5 Form 990-PF, Part II, Line 13 Investments - Other Valuation Book Fair Market __Method_ Value Value Other Investments T Rowe Price GNMA fund - 53,232 shrs Mkt Val 500,000. \$ 525,935. Total \$ 500,000. \$ 525,935. Statement 6 Form 990-PF, Part II, Line 20 Loans from Officers, Directors, Trustees, and Key Employees Balance Due Lender's Name: Oliver and Helen Wolcott Lender's Title: Directors and officers Date of Note: 10/15/2008

Interest Rate: None

Maturity Date: Repayment Terms:

Security Provided: Purpose of Loan: Desc. of Consideration: Working capital

Cash FMV of Consideration: 50,000. Original Amount: 50,000.

\$ 50,000. Balance Due:

Due on demand, interest free

10/15/2010

Lender's Name: Oliver and Helen Wolcott Lender's Title: Directors and officers 6/03/2009 Date of Note:

6/03/2010 Maturity Date: Repayment Terms: Due on demand, interest free

None

Interest Rate:
Security Provided:
Purpose of Loan:
Desc. of Consideration: Working capital

Cash FMV of Consideration: 50,000. 50,000. Original Amount: Balance Due:

Total \$ 100,000.

50,000.

2008	Federal Statement	S		Page 3
Client WOLCOTPF	The Wolcott Family Founda	tion		84-157072
Statement 7	'			09·55AI
Form 990-PF, Part VIII, Line 1 List of Officers, Directors, Trustee	s, and Key Employees			
Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Account/
Helen M. Wolcott 2309 Clermont Denver, CO 80207			\$ 0.	
Oliver Wolcott 2309 Clermont Denver, CO 80207	Dir., Treasurer 2.00	0.	0.	0.
Elizabeth Wolcott 141 Jersey Street Denver, CO 80220	Dir., Secretary 5.00	33,300.	0.	0.
Peter Wolcott 682 S. Pontiac Street Denver, CO 80224	Dir., Ast Treas 1.50	0.	0.	0.
Steven Wolcott P.O. Box 6 Paonia, CO 81428	Dir., Chairman 1.50	0.	0.	0.
Jennifer Huggins 576 Bokman Place Sonoma, CA 95476	Director 1.50	0.	0.	0.
Andrew Wolcott 2309 Clermont Denver, CO 80207	Director 1.50	0.	0.	0.
Kiva Williams 8005 E. Colorado Ave., #2 Denver, CO 80231	Director 1.50	0.	0.	0.
Eli O. Lindsey-Wolcott 38270 Stucker Mesa Road Hotchkiss, CO 81419	Director 1.50	0.	0.	0.
Naomi Kasper 28661 North Road Hotchkiss, CO 81419	Director 1.50	0.	0.	0.
Jasmine Wolcott 682 South Pontiac Street Denver, CO 80224	Director 1.50	0.	0.	0.
Noah Wolcott 4727 Park Blvd San Diego, CA 92116	Director 1.50	0.	0.	0.

2008

Federal Statements

Page 4

Client WOLCOTPF

The Wolcott Family Foundation

84-1570728

2/11/10

09·55AM

Statement 7 (continued)
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours <u>Per Week Devoted</u>	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
Ben D. Lindsey-Wolcott 3820 035 Drive Paonia, CO 81428	Director 1.50	\$ 0.	\$ 0.	\$ 0.
Jordan W. Huggins 576 Bokman Place Sonoma, CA 95476	Director 1.50	0.	0.	0.
	Total	\$ 33,300.	\$ 0.	\$ 0.

Statement 8
Form 990-PF, Part XV, Line 1a
Foundation Managers - 2% or More Contributors

Helen M. Wolcott Oliver Wolcott

Statement 9 Form 990-PF, Part XV, Line 2a-d Application Submission Information

Name of Grant Program:

Name:

Care Of:

Street Address:
City, State, Zip Code:

Telephone:

Form and Content:

The Wolcott Family Foundation The Wolcott Family Foundation

P.O. Box 460847 Denver, CO 80246

None

Completed Grant Application Cover Letter.

A cover letter.

Program budget showing revenues and expenses.

Copy of IRS 501(c)(3) exemption letter.

Two references of groups or people in the applicants

field.

List of board members and their relevant activities.

Key staff biographies.

Progress reports for repeat applicants.

Two or three pages of narrative is recommended with a detailed description of the project. Comments should

cover the following:

Is it a new project or expansion of an existing project?What are the goals, objectives, strategies and time

line?

- Whom will it serve?

- How will you evaluate the project?

- Include names of other organizations that you work with.

Submission Deadlines: General Restrictions on Awards: Prior

Generally, the first Friday of September Priority is given to organizations that:

- empower individuals and communities to organize for

social change.

2008

Federal Statements

Page 5

Client WOLCOTPF

The Wolcott Family Foundation

84-1570728

2/11/10

09·55AM

Statement 9 (continued)
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

- seek to strengthen civil liberties and civil rights (e.g. equal opportunity, equal justice and racism, equal protection and due process, disabilities and reproductive rights).

-build community development that seek to break the cycle of poverty, create economic opportunity and build effective leadership in distressed communities (e.g. access to quality employment, leadership development, community participation).

- demonstrates linkage and interdependence of ecosystems and economies with win-win solutions and collaborative approaches.

Consideration is given to projects that emphasize environmental preservation, advocacy and community involvement aimed at root causes of societal problems.

The following are not funded:

- groups with annual budgets over \$350,000.
- individuals.
- scholarship.
- capital campaigns.
- endowments.

Organizations must be non-profits per IRC Section 501(c)(3).
Priority is given to organizations in Colorado.
Grants are for one year.
Subsequent grants may be approved if a progress report is filed for the prior year.

Grants may be for general funding or specific projects. Site visits may be required at the discretion of the Foundation.

Grants amounts are generally in the range of \$1,000 to \$7,500.