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

2008

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

For calendar year 2008, or tax year beginning DEC 1, 2008, 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  
**BOECKMANN CHARITABLE FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address) Room/suite  
**15505 ROSCOE BOULEVARD**

City or town, state, and ZIP code  
**NORTH HILLS, CA 91343**

A Employer identification number  
**95-3806976**

B Telephone number  
**(818) 787-3800**

C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐  
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

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

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16)  
\$ **157,599.** (Part I, column (d) must be on cash basis.)

J Accounting method ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	10,456.			
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	34.	34.	34.	STATEMENT 1
4	Dividends and interest from securities	52.	52.	52.	STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	3,109.	3,109.	3,109.	STATEMENT 3
12	Total. Add lines 1 through 11	13,651.	3,195.	3,195.	
13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 4	1,060.	0.	0.	0.
b	Accounting fees STMT 5	4,689.	0.	0.	0.
c	Other professional fees				
17	Interest				
18	Taxes STMT 6	546.	0.	0.	0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 7	81.	0.	0.	0.
24	Total operating and administrative expenses. Add lines 13 through 23	6,376.	0.	0.	0.
25	Contributions, gifts, grants paid	154,710.			154,710.
26	Total expenses and disbursements. Add lines 24 and 25	161,086.	0.	0.	154,710.
27	Subtract line 26 from line 12	<147,435.>			
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)		3,195.		
c	Adjusted net income (if negative, enter -0-)			3,195.	

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

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			154,717.	26,809.	26,809.
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶ 1,000.					
	Less allowance for doubtful accounts ▶			20,527.	1,000.	1,000.
	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 Investments - corporate stock STMT 8			33,154.	33,154.	34,297.
	c Investments - corporate bonds					
Liabilities	11 Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
	12 Investments - mortgage loans					
	13 Investments - other STMT 9			95,493.	95,493.	95,493.
	14 Land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
	15 Other assets (describe ▶)					
	16 Total assets (to be completed by all filers)			303,891.	156,456.	157,599.
	17 Accounts payable and accrued expenses					
	18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)			0.	0.		
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	27 Capital stock, trust principal, or current funds			0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds			303,891.	156,456.	
	30 Total net assets or fund balances			303,891.	156,456.	
31 Total liabilities and net assets/fund balances			303,891.	156,456.		

## 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	303,891.
2 Enter amount from Part I, line 27a	2	<147,435.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	156,456.
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	156,456.

**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.)
<b>1a</b>				
<b>b</b> NONE				
<b>c</b>				
<b>d</b>				
<b>e</b>				

(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)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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	
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

**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	492,045.	543,240.	.905760
2006	835,114.	1,090,378.	.765894
2005	658,375.	1,607,172.	.409648
2004	759,901.	1,987,964.	.382251
2003	1,863,148.	3,112,714.	.598561

<b>2</b> Total of line 1, column (d)	2	3.062114
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.612423
<b>4</b> Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	213,024.
<b>5</b> Multiply line 4 by line 3	5	130,461.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	32.
<b>7</b> Add lines 5 and 6	7	130,493.
<b>8</b> Enter qualifying distributions from Part XII, line 4	8	154,710.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter _____ (attach copy of ruling letter if necessary-see instructions)		1	32.
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			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		3	32.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	32.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			
6 Credits/Payments			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax Check here <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		32.
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2009 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

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

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► HERBERT F. BOECKMANN II Telephone no ► (818) 787-3800 Located at ► 15505 ROSCOE BLVD, NORTH HILLS, CA ZIP+4 ► 91343			
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	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?	<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	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?		4b X

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**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

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?

6b

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

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(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
HERBERT F. BOECKMANN II 15505 ROSCOE BLVD NORTH HILLS, CA 91343	CEO, PART-TIME 0.00	0.	0.	0.
JANE BOECKMANN 15505 ROSCOE BLVD NORTH HILLS, CA 91343	SECRETARY SCFO, PART-TIME 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

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**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	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	32,111.
b	Average of monthly cash balances	1b	87,664.
c	Fair market value of all other assets	1c	96,493.
d	Total (add lines 1a, b, and c)	1d	216,268.
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	216,268.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,244.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	213,024.
6	Minimum investment return. Enter 5% of line 5	6	10,651.

**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	10,651.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	32.
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	32.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	10,619.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	10,619.
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	10,619.

**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	154,710.
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	154,710.
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	32.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	154,678.

**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				10,619.
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	1,708,560.			
b From 2004	662,209.			
c From 2005	578,507.			
d From 2006	788,807.			
e From 2007	464,985.			
f Total of lines 3a through e	4,203,068.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$	154,710.			
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				10,619.
e Remaining amount distributed out of corpus	144,091.			
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:	4,347,159.			
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	1,708,560.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	2,638,599.			
10 Analysis of line 9				
a Excess from 2004	662,209.			
b Excess from 2005	578,507.			
c Excess from 2006	788,807.			
d Excess from 2007	464,985.			
e Excess from 2008	144,091.			

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N/A

**b** Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(i)(3) or ☐ 4942(i)(5)

**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**

3 Subtract line 2d from line 2c  
Complete 3a, b, or c for the  
alternative test relied upon

(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) )

SEE STATEMENT 10

**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

HERBERT F BOECKMANN II & JANE BOECKMANN

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

BY LETTER OR INDIRECT CONTACT

**c Any submission deadlines**

NONE

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

NONE

**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</b> <i>Paid during the year</i>  SEE ATTACHED				154,710.
<b>Total</b>				▶ <b>3a</b> 154,710.
<b>b</b> <i>Approved for future payment</i>  NONE				
<b>Total</b>				▶ <b>3b</b> 0.





**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, and 990-PF.

OMB No 1545-0047

**2008**

Name of the organization

Employer identification number

BOECKMANN CHARITABLE FOUNDATION

95-3806976

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**. (Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.)

**General Rule**

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) ▶ \$ \_\_\_\_\_

**Caution.** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they **must** answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions  
for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

BOECKMANN CHARITABLE FOUNDATION

95-3806976

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JAMES FARLEY C/O FORD MOTOR CO, 21175 OAKWOOD BLVD, ROOM 2UC29  DEARBORN, MI 48124	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2		\$	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

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SOURCE	AMOUNT
BANK OF AMERICA	34.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	34.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BIASTRE FAMILY MARITAL TRUST	52.	0.	52.
TOTAL TO FM 990-PF, PART I, LN 4	52.	0.	52.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BIASTRE FAMILY MARITAL TRUST	110.	110.	110.
TAX REFUNDS	2,999.	2,999.	2,999.
TOTAL TO FORM 990-PF, PART I, LINE 11	3,109.	3,109.	3,109.

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FORM 990-PF LEGAL FEES STATEMENT 4

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	1,060.	0.	0.	0.
TO FM 990-PF, PG 1, LN 16A	1,060.	0.	0.	0.

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FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING	4,689.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 16B	4,689.	0.	0.	0.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAXES & LICENSES	546.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	546.	0.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FROM K-1 - FRANK A BIASTRE TRUST K-1	81.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	81.	0.	0.	0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
AURA SYSTEMS, INC (HOLDING)	1,108.	253.		
EXTERRAN HOLDINGS, INC.	32,046.	34,044.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	33,154.	34,297.		

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PROPERTY IN COSTA RICA	COST	95,493.	95,493.
TOTAL TO FORM 990-PF, PART II, LINE 13		95,493.	95,493.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	10
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## NAME OF MANAGER

HERBERT F. BOECKMANN II  
JANE BOECKMANN

BOECKMANN CHARITABLE FOUNDATION  
FEIN 95-3806976  
SCHEDULE OF CONTRIBUTIONS, GIFTS, GRANTS PAID  
NOVEMBER 30, 2009

ABUNDANT GRACE MINISTRIES 6712 S FIGUEROA STREET LOS ANGELES, CA 90003	1,000
ADAPTIVE SPORTS AND RECREATION 2279 ROWLAND STREET SIMI VALLEY, CA 93063	1,000
AMERICANISM EDUCATIONAL LEAGUE PO BOX 1287 MONROVIA, CA 91017-9901	300
CALVARY CHAPEL BURBANK 2707 N GLENOAKS BLVD BURBANK, CA 91504	1,000
CALVARY CHAPEL CAMARILLO 380 MOBIL AVENUE CAMARILLO, CA 93010	1,000
CALVARY TEMPLE PENTECOSTAL HOLINESS CHURCH 11958 VANOWEN STREET NORTH HOLLYWOOD, CA 91605	1,000
CEDARS CULTURAL & EDUCATIONAL FOUNDATION PO BOX 2581 TOLUCA LAKE, CA 91610	2,000
CHILDRENS HOSPITAL LOS ANGELES 4650 W SUNSET BOULEVARD LOS ANGELES, CA 90027	4,000
CHILDRENS HUNGER FUND 12820 PIERCE STREET PACOIMA, CA 91331	1,000
COMMUNITY ENHANEMENT SERVICES 16743 SCHOENBORN STREET NORTH HILLS, CA 91343	11,000
COVENANT FAITH CENTER 9600 TOPANGA CANYON BLVD CHATSWORTH, CA 91313	1,000
CRI HELP, INC 11027 BURBANK BLVD NORTH HOLLYWOOD, CA 91601	5,000
D'VEAL CORP 855 N ORANGE GROVE BLVD #207 PASADENA, CA 91103	3,000
DEVONSHIRE PALS 8860 CORBIN AVE #321 NORTHRIDGE, CA 91324	5,000
ECONOMIC ALLIANCE OF THE SAN FERNANDO VALLEY 5121 VAN NUYS BLVD #200 SHERMAN OAKS, CA 91403	5,000
EMMANUEL CHURCH 438 EAST HAVARD ROAD BURBANK, CA 91501	1,000
FIRST BAPTIST CHURCH OF LOS ANGELES 760 S WESTMORELAND AVENUE LOS ANGELES, CA 90005	1,000
FLOW OF LIFE MINISTRIES PO BOX 462806 ESCONDIDO, CA 92046	1,000
FRIENDS & HELPERS FOUNDATION 16830 VENTURA BLVD #501 ENCINA, CA 91436	2,000
GEMMA WENGER MINISTRIES 1154 ROBERTO LANE LOS ANGELES, CA 90077	700

BOECKMANN CHARITABLE FOUNDATION  
FEIN 95-3806976  
SCHEDULE OF CONTRIBUTIONS, GIFTS, GRANTS PAID  
NOVEMBER 30, 2009

GENTLE BARN 26910 SIERRA HIGHWAY, STE D-8 NEWHALL, CA 91321	1,000
GOD'S PEOPLE MINISTRY 1627 PARK AVENUE LOS ANGELES, CA 90026	1,000
GRACE BAPTIST CHURCH OF WILMINGTON 1502 MCDONALD AVENUE WILMINGTON, CA 90744	1,000
HEAVENLY MANNA 8942 WILLIS AVE UNIT 9 VAN NUYS, CA 91402	500
HORATIO ALGER ASSOCIATION 99 CANAL CENTER PLAZA ALEXANDRIA, VA 22314	20,000
IN HIS FOOTSTEPS CHURCH 1986 WETHERLY WAY RIVERSIDE, CA 92506	1,000
LOS ANGELES POLICE HISTORICAL SOCIETY 8721 SANTA MONICA BLVD #345 LOS ANGELES, CA 90069	5,000
LOS ANGELES WORLD AFFAIRS COUNCIL 345 S FIGUEROA STREET, SUITE 313 LOS ANGELES, CA 90071	3,150
MAYORS PRAYER BREAKFAST 2001 S VERMONT AVENUE LOS ANGELES, CA 90007	285
MEND 10641 N SAN FERNANDO ROAD PACOIMA, CA 91331	2,500
MISSION COMMUNITY POLICE COUNCIL PO BOX 922857 SYLMAR, CA 91392	500
ONEGENERATION 17400 VICTORY BLVD VAN NUYS, CA 91406	7,500
OUR LADY OF PEACE CHURCH 15444 NORDHOFF STREET NORTH HILLS, CA 91343	5,000
PEPPERDINE UNIVERSITY 24255 PACIFIC COAST HIGHWAY MALIBU, CA 90263	3,000
PERSIAN WORSHIPERS OF CHRIST 7475 FALLBROOK AVENUE WEST HILLS, CA 91307	1,000
PETERSEN AUTOMOTIVE MUSEUM FOUNDATION 6060 WILSHIRE BLVD LOS ANGELES, CA 90036	1,200
SAN ANTONIO DE PADUA ACADEMY 1500 E BRIDGE STREET LOS ANGELES, CA 90033	1,000
SAN FERNANDO VALLEY COMMUNITY MENTAL HEALTH CENTER, INC 6931 VAN NUYS BLVD 3RD FLOOR VAN NUYS, CA 91405	6,000
SEARCH TO INVOLVE PILIPINO AMERICANS 3200 WEST TEMPLE STREET LOS ANGELES, CA 90026	1,000
SHEPHERDING THE NATIONS 18644 SHERMAN WAY RESEDA, CA 91335	500

BOECKMANN CHARITABLE FOUNDATION  
FEIN 95-3806976  
SCHEDULE OF CONTRIBUTIONS, GIFTS, GRANTS PAID  
NOVEMBER 30, 2009

SOCIETY DEVOTED TO THE SACRED HEART 10480 1/2 WINNETKA AVENUE CHATSWORTH, CA 91311	1,000
SONDRA BERRY-YOUNG MINISTRIES PO BOX 92802 PASADENA, CA 91109	2,000
ST CLARE CATHOLIC CHURCH 19606 CALLA WAY SANTA CLARITA, CA 91351	1,000
SUMMIT CHRISTIAN FELLOWSHIP 416 S CURRY STREET TEHACHAPI, CA 93561	1,000
SURE FOUNDATION WORSHIP CENTER PO BOX 903 VENTURA, CA 93002	1,000
THE BRIDGE BIBLE FELLOWSHIP 18644 SHERMAN WAY RESEDA, CA 91335	2,000
THE JEFFREY FOUNDATION 5470 W WASHINGTON BLVD LOS ANGELES, CA 90016	1,000
THE KING'S COLLEGE AND SEMINARY 14800 SHERMAN WAY VAN NUYS, CA 91405	7,500
THE PROMISES FOUNDATION 637 12TH STREET SANTA MONICA, CA 90402	1,500
TIDES CHURCH 31566 RAILROAD CANYON ROAD CANYON LAKE, CA 92587	1,000
U C REGENTS FILE 30561, PO BOX 60000 SAN FRANCISCO, CA 91460-0001	10,325
UCP WHEELS FOR HUMANITY 12750 RAYMER ST UNIT 4 NORTH HOLLYWOOD, CA 91605	5,000
UNION RESCUE MISSION 545 S SAN PEDRO STREET LOS ANGELES, CA 90013	1,000
US DOCTORS FOR AFRICA 14945 VENTURA BLVD STE 224 SHERMAN OAKS, CA 91403	5,000
VINEYARD CHRISTIAN FELLOWSHIP 3838 S CENTINELA AVENUE LOS ANGELES, CA 90066	1,000
WEST VALLEY BOYS & GIRLS CLUB 7245 REMMET AVENUE CANOGA PARK, CA 91303	2,000
YOUTH LINK OF AMERICA PO BOX 93866 LOS ANGELES, CA 90093	1,250
<b>TOTAL</b>	<b>154,710 20</b>

**PURPOSE OF THE ABOVE CONTRIBUTIONS:**

**TO ASSIST NON-PROFIT ORGANIZATIONS IN THEIR  
CHARITABLE ENDEAVORS**