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

2009

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply.

Initial return

Initial return of a former public charity

Final return

Amended return

Address change

Name change

Use the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

BILL AND JACKIE LOCKWOOD FAMILY  
FOUNDATION

A Employer identification number

03-6100828

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

Room/suite

B Telephone number (see page 10 of the instructions)

937-294-8318

City or town, state, and ZIP code  
DAYTON OH 45419-3540C 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

J Accounting method  Cash  Accrual

of year (from Part II, col. (c),

 Other (specify)

line 16) ► \$ 3,070,609 (Part I, column (d) must be on cash basis)

## Part I Analysis of Revenue and Expenses (The

total of amounts in columns (b), (c), and (d) may not necessarily equal

the amounts in column (a) (see page 11 of the instructions) )

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)	98,550			
2	Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	2	2	2	
4	Dividends and interest from securities				
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	STMT 1	-14,273		
b	Gross sales price for all assets on line 6a	197,276			
7	Capital gain net income (from Part IV, line 2)		0		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns & allowances				
b	Less. Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	84,279	2	2	
13	Compensation of officers, directors, trustees, etc				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)	STMT 2	1,275		
c	Other professional fees (attach schedule)				
17	Interest		2,036		
18	Taxes (attach schedule) (see page 14 of the instructions)	STMT 3	200		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule)				
24	Total operating and administrative expenses				
	Add lines 13 through 23	3,511	0		0
25	Contributions, gifts, grants, etc.	139,173			139,173
26	Total expenses and disbursements. Add lines 24 and 25	142,684	0	0	139,173
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-58,405			
b	Net investment income (if negative, enter -0-)		2		
c	Adjusted net income (if negative, enter -0-)			2	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments		40,015	94,609
	3	Accounts receivable ►			
		Less allowance for doubtful accounts ►			
	4	Pledges receivable ►			
		Less allowance for doubtful accounts ►			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (att. schedule) ►			
		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 (attach schedule)	SEE STMT 4		
	b	Investments—corporate stock (attach schedule)	3,006,700	2,976,000	2,976,000
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ►			
		Less accumulated depreciation (attach sch ) ►			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ►			
		Less accumulated depreciation (attach sch ) ►			
	15	Other assets (describe ►			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,046,715	3,070,609	3,070,609
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ►			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	3,046,715	3,070,609	
	30	Total net assets or fund balances (see page 17 of the instructions)	3,046,715	3,070,609	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	3,046,715	3,070,609	

## 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	3,046,715
2	Enter amount from Part I, line 27a	2	-58,405
3	Other increases not included in line 2 (itemize) ► SEE STATEMENT 5	3	82,299
4	Add lines 1, 2, and 3	4	3,070,609
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,070,609

**Part IV. Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	N/A			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
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) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8			3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	142,401	3,642,678	0.039092
2007	154,894	3,678,640	0.042106
2006	107,750	2,084,152	0.051700
2005	56,890	870,425	0.065359
2004	44,762	606,071	0.073856

2 Total of line 1, column (d)

2 0.272113

3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

3 0.054423

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4 2,946,480

5 Multiply line 4 by line 3

5 160,356

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

7 Add lines 5 and 6

7 160,356

8 Enter qualifying distributions from Part XII, line 4

8 139,173

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ►  and enter "N/A" on line 1.  
 'Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ►  and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2009 estimated tax payments and 2008 overpayment credited to 2009

b Exempt foreign organizations—tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here  if Form 2220 is attached

9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**

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 2010 estimated tax** ► 244 Refunded ► 11

6a	244
6b	
6c	
6d	
7	244
8	
9	
10	244
11	

**Part VII-A Statements Regarding Activities**

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?

1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the 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

1c Did the foundation file Form 1120-POL for this year?

1d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  
 (1) On the foundation. ► \$ \_\_\_\_\_ (2) On foundation managers. ► \$ \_\_\_\_\_

1e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ \_\_\_\_\_

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  
 If "Yes," attach a detailed description of the activities

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4b If "Yes," has it filed a tax return on Form 990-T for this year?

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  
 If "Yes," attach the statement required by General Instruction T

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?

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

8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► NONE

8b 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

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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

**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 page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► WILLIAM D. LOCKWOOD 239 SPIREA DRIVE Located at ► DAYTON, OH	Telephone no ► 937-294-8318		
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	ZIP+4 ► 45419-3540	► 15	► □

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	► □
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	N/A	1c
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If "Yes," list the years ► 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)	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. ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2009 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 2009.)	N/A	3b
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		
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 2009?		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:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/> Yes		N/A	5b
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/> Yes <input type="checkbox"/> No			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870	<input type="checkbox"/> Yes		N/A	6b X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/> Yes		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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM D. LOCKWOOD 239 SPIREA DRIVE	DAYTON OH 45419-3540	TRUSTEE 2 00	0	0
JACQUELYN E. LOCKWOOD 239 SPIREA DRIVE	DAYTON OH 45419-3540	TRUSTEE 2 00	0	0

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

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

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

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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 (see page 23 of the instructions). If none, enter "NONE."**

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

Total number of others receiving over \$50,000 for professional services ►

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1 N/A

2

3

4

**Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1 N/A

2

All other program-related investments. See page 24 of the instructions

3

Total. Add lines 1 through 3 ►

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	2,991,350
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	2,991,350
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,991,350
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	44,870
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,946,480
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	147,324

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

1	Minimum investment return from Part X, line 6	1	147,324
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1	3	147,324
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	147,324
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	147,324

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	139,173
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	139,173
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	139,173

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

## Part XII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				147,324
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years: 20 ____ , 20 ____ , 20 ____				
3 Excess distributions carryover, if any, to 2009.				
a From 2004	3,740			
b From 2005	13,369			
c From 2006	3,544			
d From 2007				
e From 2008				
f Total of lines 3a through e	20,653			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 139,173				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				139,173
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	8,151			8,151
6 Enter the net total of each column as indicated below:	12,502			
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	12,502			
10 Analysis of line 9:				
a Excess from 2005	8,958			
b Excess from 2006	3,544			
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling				►			
b	Check box to indicate whether the foundation is a private operating foundation described in section				<input type="checkbox"/>	4942(j)(3) or	<input type="checkbox"/>	4942(j)(5)
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed							
b	85% of line 2a							
c	Qualifying distributions from Part XII, line 4 for each year listed							
d	Amounts included in line 2c not used directly for active conduct of exempt activities							
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c							
3	Complete 3a, b, or c for the alternative test relied upon:							
a	"Assets" alternative test—enter:							
(1)	Value of all assets							
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)							
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed							
c	"Support" alternative test—enter:							
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)							
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii)							
(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 page 28 of the instructions.)****1 Information Regarding Foundation Managers:**

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

JACQUELYN E. LOCKWOOD

\$98,550

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

N/A

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

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

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

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

c Any submission deadlines:  
N/A

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

## Part XV Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE STATEMENT 6				139,173
<b>Total</b>			► 3a	139,173
b Approved for future payment N/A				
<b>Total</b>			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

		Unrelated business income		Excluded by section 512, 513, or 514	(e) Related or exempt function income (See page 28 of the instructions )
		(a) Business code	(b) Amount	(c) Exclusion code	
1	Program service revenue:				
a					
b					
c					
d					
e					
f					
g	Fees and contracts from government agencies				
2	Membership dues and assessments				
3	Interest on savings and temporary cash investments				2
4	Dividends and interest from securities				
5	Net rental income or (loss) from real estate:				
a	Debt-financed property				
b	Not debt-financed property				
6	Net rental income or (loss) from personal property				
7	Other investment income				
8	Gain or (loss) from sales of assets other than inventory				- 14 , 273
9	Net income or (loss) from special events				
10	Gross profit or (loss) from sales of inventory				
11	Other revenue: a				
b					
c					
d					
e					
12	Subtotal. Add columns (b), (d), and (e)		0	0	- 14 , 271
13	Total. Add line 12, columns (b), (d), and (e)	13			- 14 , 271

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

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
N/A	

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

**a Transfers from the reporting foundation to a noncharitable exempt organization of**

- (1) Cash
- (2) Other assets

Other transactions

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

**c Sharing of facilities, equipment, mailing lists, other assets, or paid employees**

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

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

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes  No

**b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Date

**TRUSTEE**

## Title

<p>Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge</p>	
 Signature of officer or trustee	<span style="border: 1px solid black; padding: 2px;">11/14/10</span> Date
<span style="border: 1px solid black; padding: 2px;">TRUSTEE</span> Title	

<b>Name of the organization</b> <b>BILL AND JACKIE LOCKWOOD FAMILY FOUNDATION</b>	<b>Employer identification number</b> <b>03-6100828</b>
--	--

**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 an organization 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 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 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 (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions 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 990-EZ that received from any one contributor, during the year, 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.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

## Name of organization

BILL AND JACKIE LOCKWOOD FAMILY

## Employer identification number

03-6100828

## Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JACQUELYN E. LOCKWOOD 239 SPIREA DRIVE  DAYTON OH 45419-3540	\$ 98,550	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II if there is a noncash contribution )
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II if there is a noncash contribution )
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II if there is a noncash contribution )
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II if there is a noncash contribution )
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II if there is a noncash contribution )

Name of organization

BILL AND JACKIE LOCKWOOD FAMILY

Employer identification number

03-6100828

## Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	BERKSHIRE HATHAWAY STOCK	\$ 98,550	12/31/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

## Federal Statements

### Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Whom Sold	Date Acquired	Date Sold	Description		How Received		Depreciation	Net Gain / Loss
			Sale Price	PURCHASE Cost	Expense			
2 SHS BERKSHIRE HATHAWAY - CLASS A		12/30/09	\$ 197,276	\$ 211,549	\$ 0	\$ 0	\$ 0	\$ -14,273
TOTAL			\$ 197,276	\$ 211,549	\$ 0	\$ 0	\$ 0	\$ -14,273

### Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment		Adjusted Net	Charitable Purpose
		\$	\$		
ACCOUNTING FEES	\$ 1,275	\$ 0	\$ 0	\$ 0	\$ 0
TOTAL	\$ 1,275	\$ 0	\$ 0	\$ 0	\$ 0

### Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment		Adjusted Net	Charitable Purpose
		\$	\$		
FILING FEES	\$ 200	\$ 0	\$ 0	\$ 0	\$ 0
TOTAL	\$ 200	\$ 0	\$ 0	\$ 0	\$ 0

**Federal Statements****Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
BERKSHIRE HATHAWAY	\$ 3,006,700	\$ 2,976,000	MARKET	\$ 2,976,000
TOTAL	\$ 3,006,700	\$ 2,976,000		\$ 2,976,000

**Statement 5 - Form 990-PF, Part III, Line 3 - Other Increases**

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	\$ 82,299
TOTAL	\$ 82,299

**Federal Statements****Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000**

Name of Manager	Amount
JACQUELYN E. LOCKWOOD	\$ 98,550
<b>TOTAL</b>	<b>\$ 98,550</b>

## Federal Statements

## Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name	Address	Relationship	Status	Purpose	Amount
AMERICAN RED CROSS	SEE LIST			SEE LIST	104
AMNESTY INTERNATIONAL	SEE LIST			SEE LIST	25
BALL STATE UNIVERSITY	SEE LIST			SEE LIST	100
BOY SCOUTS - TROOP 285	SEE LIST			SEE LIST	3,000
BUILDING BRIDGES	SEE LIST			SEE LIST	600
CAMP INDEPENDENCE	SEE LIST			SEE LIST	1,000
COKER METHODIST CHURCH	SEE LIST			SEE LIST	4,000
CULTURE WORKS	SEE LIST			SEE LIST	3,000
DAYBREAK	SEE LIST			SEE LIST	1,000
DAYTON ART INSTITUTE	SEE LIST			SEE LIST	2,500
DAYTON BALLET	SEE LIST			SEE LIST	50
DAYTON DAILY NEWS VALLEY	SEE LIST			SEE LIST	1,000
DAYTON EARLY COLLEGE ACAD	SEE LIST			SEE LIST	10,000
DAYTON FOUNDATION	SEE LIST			SEE LIST	40
DAYTON OPERA ASSOCIATION	SEE LIST			SEE LIST	23,550
DAYTON PHILHARMONIC	SEE LIST			SEE LIST	3,500
DOCTORS WITHOUT BORDERS	SEE LIST			SEE LIST	1,000
FRIENDS OF SMITH GARDENS	SEE LIST			SEE LIST	100
HABITAT FOR HUMANITY	SEE LIST			SEE LIST	100

## Federal Statements

## Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
HOLY ANGELS CHURCH	SEE LIST			SEE LIST	30
HOSPICE OF DAYTON	SEE LIST			SEE LIST	50
HUMAN RACE THEATRE CO.	SEE LIST			SEE LIST	500
LEGIONARIES OF CHRIST	SEE LIST			SEE LIST	100
LIFE ESSENTIALS	SEE LIST			SEE LIST	100
MADD	SEE LIST			SEE LIST	50
MARSHALL UNIVERSITY	SEE LIST			SEE LIST	2,000
MASSACHUSETTS HOSPITAL	SEE LIST			SEE LIST	16,534
METROPOLITAN BROADCAST	SEE LIST			SEE LIST	50
METROPOLITAN OPERA GUILD	SEE LIST			SEE LIST	50
MIAMI VALLEY HEALTH FOUND	SEE LIST			SEE LIST	50
MICHIGAN OPERA THEATER	SEE LIST			SEE LIST	100
MUSE MACHINE	SEE LIST			SEE LIST	50,240
OAKWOOD FRATERNAL ORDER	SEE LIST			SEE LIST	50
OAKWOOD SCHOOLS FOUND	SEE LIST			SEE LIST	2,000
OPERA GUILD OF DAYTON	SEE LIST			SEE LIST	250
PHILMONT STAFF ASSOCIATION	SEE LIST			SEE LIST	2,000
SALVATION ARMY	SEE LIST			SEE LIST	1,000
SPECIAL OLYMPICS OHIO	SEE LIST			SEE LIST	100

## Federal Statements

**Statement 6 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
ST PAULS EPISCOPAL CHURCH	SEE LSIT			SEE LIST	50
UNIVERSITY OF CINCINNATI	SEE LIST			SEE LIST	3,000
VICTORIA THEATRE	SEE LIST			SEE LIST	3,150
WDPR/WDPG DAYTON PUBLIC R	SEE LIST			SEE LIST	2,100
WIDOWS HOME FOUNDATION	SEE LIST			SEE LIST	500
WRIGHT DUNBAR INC	SEE LIST			SEE LIST	400
WRIGHT LIBRARY	SEE LIST			SEE LIST	50
TOTAL					<u>139,173</u>

## 2009 MASTER FOUNDATION CONTRIBUTIONS

### American Cancer Society

The American Cancer Society (ACS) is the "nationwide community-based voluntary health organization dedicated to eliminating cancer as a major health problem by preventing cancer, saving lives, and diminishing suffering from cancer, through research, education, advocacy and service

### American Diabetes Association

Southwest Ohio Service Area  
8899 Brookside Avenue, Suite 102  
West Chester, OH 45069

ALSO:

PPO Box 11833  
Merrifield, VA 22116-8033

### American Heart Association

24 N Jefferson St.  
Dayton, OH 45402

### American Institute for Cancer Research

Mission: To provide funding for research into the relationship between diet, nutrition and cancer, and to inform everyone how a healthy diet now can help to prevent cancer in the future.

### American Red Cross – Dayton Area Chapter – Schaller Runner's Fund

Designated for disaster relief in Dayton

### Amnesty International

Membership in non-profit organization dedicated to saving prisoners of conscience.

### Arts Center Foundation

138 N. Main Street  
Dayton Ohio 45402-1776  
(937) 228-7591

Funding for the new Benjamin and Marian Schuster Performing Arts Center in Dayton, Ohio.

### Ball State University

Muncie, Indiana 47306-0050  
765-285-1633

In support of the university's efforts to provide an excellent education at a reasonable cost and allows Ball State to focus resources on those areas where the need is greatest.

### Brain Tumor Center @ Duke University

Duke University  
Durham, North Carolina 27710  
**Our Mission**

- To cure brain and spinal tumors
- To translate scientific advances in our research laboratories to state-of-the-art treatments for the patient
- To provide the resources and support necessary for patients and their families to meet the challenges of living with a brain tumor

Briarwood Activity Fund  
Briarwood Assisted Living Facility  
850 W. Main St.  
Coldwater, Ohio 45828

A facility regulated by the Mercer County Department of Health

Bridge Riding for the Disabled, Inc.  
2981 East Lytle Five Points Road  
Waynesville, OH 45068-9524

Building Bridges  
2157 Salem Avenue  
Dayton Ohio 45406

A non-profit organization that works with "at risk" children referred by the Montgomery County Court.

Camp Independence  
8730 Avator Circle,  
Fair Oaks Ranch, Tx. 78015:

Camp Independence provides a camping opportunity for children who have diabetes, emphasizing that the children are able to participate in all camp activities and have fun.

Central Christian Church  
1200 Forrer Blvd  
Kettering, OH 45420

We grow in faith by encouraging spiritual growth through adult and children's education programs, empowering involvement in outreach projects and activities, and praying and playing together.

Childhood Leukemia Foundation  
4770 S. Emerson Ave., Suite C  
Indianapolis, IN 46203-5967

Mission: To aid children who are suffering from many types of cancer.

Box 21  
PO Box 21  
Dayton, OH 45401  
937-836-3028  
A non-profit rescue organization. Federal ID # 316054031

Chandler Memorial Fund  
University of Alaska, Anchorage  
Department of Theatre

3211 Providence Drive  
Anchorage, Alaska 99508

Charles J. Harlow Memorial Scholarship Fund  
5902 Mt. Eagle Drive, #1605  
Alexandria, VA 22303

Mission: to provide scholarships to underprivileged students as well as direct contributions to organizations specializing in aid and support programs for underprivileged and/or at-risk adolescents.

Children's Wish Foundation International, Inc.  
Post Office Box 28785  
Atlanta, Georgia 30358

Children's Wish Foundation International is dedicated to bringing joy and hope to seriously ill children and their families world wide by involving the public in putting children first with opportunities to experience the enhanced value and quality of life through the magic of a fulfilled wish.

Christ Air, Inc.

Incorporated by Charles W Tucker, Jan Frey, Jeffrey L Chamberlain, John Skelly, Joyce Chamberlain, Sandi Evans, Christ Aid, Inc. is located at PO Box 854 Mims, FL 32754. Christ Aid, Inc. was incorporated on Monday, May 15, 1995 in the State of FL and is currently active. John Skelly represents Christ Aid, Inc. as their registered agent.

Christ United Methodist Church  
3440 Shroyer Rd.  
Dayton, Ohio 45429

Christopher Reeve Paralysis Foundation  
PO Box 9210  
Central Islip, NY 11722  
800-225-0292

A non-profit foundation to support research and development of cures and treatments for paralysis caused by spinal cord injury and other central nervous system disorders.

Coker United Methodist Church/Boy Scout Troop 285  
231 E. North Loop Rd.  
San Antonio, TX 78216-1896

Community Foundation of Henderson County  
PO Box 1108  
Hendersonville, NC 28793  
828-697-6224

A non-profit foundation providing scholarships and funding for projects in Hendersonville, NC.

Culture Works

126 N. Main St., Suite 210  
Dayton, OH 45402-1766  
937-222-2787

Culture Works is greater Dayton's United Arts Fund and Arts Council. Culture Works provides the resources necessary to ensure a stable and dependable base of support for our cultural assets. As a leader in arts and cultural development, Culture Works offers valuable services to the arts community, including professional development and technical assistance programs, promotional services, advocacy and grant-making. Culture Works raises and distributes the largest single source of private funding for the arts in Greater Dayton.

Daybreak  
50 Theobald Court  
Dayton, Ohio 45410-1250

A non-profit organization with a mission to eliminate youth homelessness in the Miami Valley through comprehensive and results-oriented programs, which provide safety and stability for runaway, troubled, and homeless youth ages 10 to 21.

Dayton Area Heart & Cancer Assoc.  
120 Zeigler St.  
Dayton, OH 45402-2543

A non-profit organization providing a comprehensive range of early detection screenings, health education, fitness and lifestyle services, and prescription assistance for people hoping to prevent or alleviate the conditions of heart disease and cancer.

Dayton Art Institute  
456 Belmonte Park North  
Dayton, Ohio 45405-4700  
937 223-3140

A non-profit museum featuring an encyclopedic collection of more than 12,000 objects spanning 5,000 years of art history. Celebrating more than 80 years of collecting, interpreting, and celebrating visual art. The museum welcomes more than 300,000 visitors annually.

Dayton Ballet  
140 N. Main Street  
Dayton, Ohio 45402  
937-449-5060

A non-profit organization whose mission is: to educate, enlighten and entertain the widest audience possible. With the Miami Valley as a base, the Dayton Ballet Association will maintain and further develop its artistic, managerial and technical resources to be a total dance organization with the very best in performance, education, outreach, and community service.

Dayton Opera Association  
138 North Main Street  
Dayton, OH 45402  
Phone: (937) 228-7591

The Dayton Opera Association is a not-for-profit organization which receives funding from a variety of diverse public, corporate, individual and private sources.

**Dayton Philharmonic Volunteer Association (DPVA)**

Mission: To support the Dayton Philharmonic Orchestra and the Dayton Philharmonic Youth Orchestra, the junior strings orchestra and the Dayton Philharmonic Concert Band. Through the DPVA, members volunteer thousands of hours to prepare and present in-school docent programs.

**Dayton Philharmonic Orchestra**

Mission: To support the Dayton Philharmonic Orchestra in the areas of education, promotion, fundraising and membership development

**Dayton Philharmonic Youth Orchestra**

Founded in 1937 by Paul Katz, the Dayton Philharmonic Youth Orchestra brings together the greater Dayton area's most gifted young orchestral musicians, providing the opportunity to study and perform a broad range of orchestral repertoire. The DPYO is committed to inspiring an overall cultural awareness and appreciation of music in its members and audiences, strengthening our region's existing school music programs, and helping stimulate interest in the development of school orchestral programs where none exist.

**Dayton Philharmonic Orchestra**

109 N. Main Street, Suite 200  
Dayton, OH 45409  
937-224-3521

In support of the annual fund for Dayton's major non-profit orchestra.

**Dayton Daily News**

Valley Food Relief  
PO Box 2741  
Dayton, OH 45401-2741

Mission: To provide food, clothing and toys during the holiday season to disadvantaged adults and children.

**Dayton Foundation**

2300 Kettering Tower  
Dayton OH45423

Mission to meet human needs and improve the quality of life in the Miami Valley region.  
The Greater Dayton Conservation Fund (under the Dayton Foundation umbrella).

Supports projects for maintaining natural habitats and taking care of the land.

**The Dayton Early College Academy, Inc. | 300 College Park | Dayton, OH 45469-2930**

DECA is a non-traditional charter high school singularly focused on preparing first-generation urban students to go to college.

**Doctors Without Borders**

333 7th Avenue, 2nd Floor  
New York, NY 10001-5004

Doctors Without Borders/Médecins Sans Frontières (MSF) is an international independent medical humanitarian organization that delivers emergency aid to people affected by armed conflict, epidemics, natural and man-made disasters, and exclusion from health care in nearly 70 countries. A private nonprofit association, MSF is an international network with sections in 19 countries.

Engineers Club Foundation  
(937) 824-7511  
110 E Monument Ave  
Dayton, OH 45402

A non-profit organization to support the education programs of the Engineers Club of Dayton.

First Presbyterian Church  
202 N. Franklin St.  
Greensburg, IN 47240

First Presbyterian Church

First United Methodist Church of Springboro  
60 E. North Street  
Springboro, Ohio 45066

Fredericksburg Academy  
10800 Academy Drive  
Fredericksburg, VA 22408  
Non-profit school scholarship program

Friends of Smith Gardens  
City of Oakwood  
30 Park Avenue  
Dayton, OH 45419

Membership helps defray costs associated with the maintenance of this special public garden

Gem City Ballet  
534 East First Street  
Dayton, OH 45402

A Not-for-Profit Organization teaching and presenting ballet in the Miami Valley Region

Gender Road Christian Church  
5336 Gender Road  
Canal Winchester, Ohio 43110

Good Shepherd Lutheran Church  
901 E Stroop Rd  
Dayton, OH

Habitat for Humanity International  
121 Habitat St.  
Americus, GA 31709-3498  
800-422-4828

Mission: Habitat for Humanity sells houses to partner families at no profit, through no-interest mortgages. Low-income families partner with Habitat, its volunteers and donors, investing hundreds of sweat-equity labor hours into their home's construction. Habitat receives building materials and other in-kind contributions, which in turn leverage donor dollars and build more houses.

Holy Angels Church  
1322 Brown Street  
Dayton, OH 45409

Our Mission as Holy Angels Parishioners is to provide for the Catholic religious and spiritual needs of our members through worship, education, and stewardship. We are called to live the message of Jesus Christ, and reach out to each other and the wider community.

Hospice of Dayton  
324 Wilmington Avenue  
Dayton, Ohio 45420-1885  
937-256-4490

Mission is to provide quality hospice care to anyone in the region who needs it, regardless of financial ability.

Hospice of Cincinnati  
(513) 891-7700  
(800) 691-7255  
(513) 792-6900  
4310 Cooper Rd  
Cincinnati, OH 45242

Provides compassionate care to the terminally ill and their families.

Hospice & Palliative Care of Louisville  
PO Box 34525  
Louisville, KY 40232-9892  
1800-264-0521

A private, not-for-profit healthcare organization dedicated to caring for persons regardless of their ability to pay for services.

Human Race Theatre Company  
126 N. Main Street Suite 300  
Dayton, Ohio 45402

Mission: To bring innovative, challenging and dynamic theatre through the Loft Series, Musical Theatre Workshops and comprehensive educational programs, to affect the conscience of our community, to see our audience as our partner in the creative experience, to provide a platform for our artists to evolve and explore and to be an educational resource to our community.

**Humane Society of Greater Dayton**

Non-profit organization for animal welfare to provide food, shelter and quality animal care.

**Inspiration Point Fine Arts Colony**

PO Box 127  
Eureka Springs, Arkansas 72632  
501-253-8595

Mission: A non-profit opera training program for both beginning singers and career-entry artists.

**Koman Race for the Cure**

A global foot race for the benefit of Cancer Research.

**The Leukemia and Lymphoma Society**  
P.O. Box 9026  
Pittsfield, MA 01202

Mission: To fund research that is searching new treatments and cures for all blood cancers including leukemia, lymphoma and melanoma.

**Lance Armstrong Foundation**

The *Lance Armstrong Foundation* unites, inspires and empowers people affected by cancer.

**Legionaries of Christ**  
500 Columbus Ave  
Thornwood, NY 10594+1907

The Legion of Christ is a religious congregation of pontifical right, founded in 1941. Its mission is to extend the Kingdom of Christ in society according to the requirements of Christian justice and charity, and in close collaboration with the bishops and the pastoral plans of each diocese. Today the Legion has over 800 priests and 2,500 major and minor seminarians, with houses in 22 countries.

**Life Essentials**  
123 Riverside Drive  
Suite 100  
Dayton, Ohio 45405  
937-586-0545

A non-profit organization dedicated to connecting people, one life at a time by providing volunteer caregivers to those in need.

**Life Resource Center**

Life Resource Centers exist for the purpose of providing information for all persons on various life issues, keeping as its foundation the Scriptural principles regarding the value of human life.

Make A Wish Foundation-S Ohio  
(513) 398-6660 4770 Duke Dr # 190  
Mason, OH

A non-profit organization to make wishes come true for ill children

March of Dimes Birth Defects Foundation  
Box 2000  
White Plains, NY  
914-428-7100

A non-profit organization supporting research, education and services that fight prematurity and birth defects.

Marshall University Autism Training Center  
One John Marshall Drive  
Huntington, WV 25755

The mission of the Autism Training Center is to provide education, training and treatment programs for West Virginians who have Autism, Pervasive Developmental Disorder (NOS) or Asperger's Disorder and have been formally registered with the Center. This is done through appropriate education, training and support for professional personnel, family members or guardians and other important in the life of a person with autism. Training shall be provided by highly skilled and appropriately experienced staff.

Metropolitan Museum of Art  
1000 Fifth Avenue  
New York, NY 10028-0198  
212-570-3753

Support enriching programs to learn about the world's cultural history through an unparalleled permanent collection of art.

Metropolitan Opera  
Lincoln Center  
New York, NY 10023  
212-362-0068

The Metropolitan Opera is a vibrant home for the most creative and talented artists working in the multidisciplinary field of opera, including singers, conductors, composers, orchestra musicians, stage directors, designers, visual artists, choreographers, and dancers from around the world.

Metropolitan Opera Broadcast Campaign  
Lincoln Center  
New York, NY 10023  
212-362-0068

The Support the Met Broadcasts Campaign is a special appeal, over and above annual membership. Because no benefits or privileges are accorded for gifts to the Support the Met Broadcasts Campaign, contributions to this special appeal are fully tax-deductible

Metropolitan Opera Guild  
Lincoln Center  
New York, NY 10023  
212-362-0068

Mission: Secure the Metropolitan Opera's continued success as a premiere performing arts organization, both nationally and internationally. Enables the Metropolitan Opera to present more than 30 weeks of performances each year including premieres and new productions, classic repertory, and works that debut talented new artists. In addition, helps to fund Guild programs that bring Opera into public schools to nurture the next generation of opera lovers and programs that identify and develop the opera stars of tomorrow.

The Support the Met Broadcasts Campaign is a special appeal, over and above annual membership. Because no benefits or privileges are accorded for gifts to the Support the Met Broadcasts Campaign, contributions to this special appeal are fully tax-deductible

MADD  
4015 EXECUTIVE PARK DR, #215  
CINCINNATI, OH 45241  
Phone: 513-769-6800

**A 501(c)(3) non-profit grass roots organization** with more than 600 chapters nationwide. MADD is not a crusade against alcohol consumption - **MADD's mission is to stop drunk driving, support the victims of this violent crime, and prevent underage drinking.**

Massachusetts General Hospital  
Development Office/Research  
165 Cambridge St., Suite 600  
Boston, MA 02114-2792  
Dystonia Research Fund

Miami University  
Division of University Advancement  
725 E. Chestnut Street  
Oxford, Ohio 45056-2480

Miami Valley Hospital Foundation  
(Miami Valley Health Foundation)  
31 Wyoming St.  
Dayton, OH 45409

To raise financial support and cultivate the community's legacy of leadership, enhancing the Margin of Excellence of providing the region's best health resources, delivered with a human touch.

### Michigan Opera Theatre

Michigan's principal opera company. The company is based in Detroit, where it performs in the Detroit Opera House. Each year it presents a season of five operas in their original language with English supertitles. The company also has an extensive arts education and outreach program, and in 2005 won a National Endowment for the Arts, Access to Artistic Excellence grant to support its staging of the world premiere of Margaret Garner.<sup>[1]</sup>

Muse Machine  
126 N. Main St.  
Suite 310  
Dayton, Ohio 45402-1766  
037-222-6873

Mission: A non-profit organization to enhance the lives of young people and their teachers by providing opportunities to experience and value the arts.

### National Composite Center/Wright Flyer

A non-profit center for research into use of composite technology.

### National Kidney Foundation

( NKF) is a major voluntary health organization in the United States. Its mission is to prevent **kidney** and urinary tract diseases, improve the health and well-being of individuals and families affected by these diseases, and increase the availability of all organs for transplantation. The organization's activities include research and training, continuing education of health care providers,

### Design and Technology Academy at Roosevelt High School

North East Independent School District  
5110 Walzem  
San Antonio, Texas 78218-2914

Contribution in support of "Smart Boards" for teachers to use to enhance instruction for all students.

### Oakwood Fraternal Order of Police Lodge 107

PO Box 107  
Oakwood, OH 45419  
298-8848

Mission: To provide the most complete professional service possible.

### Oakwood Historical Society

1047 Far Hills Ave.  
Dayton, Ohio 45419  
937-299-3793

A not-for-profit organization to preserve the history of the Oakwood Community.

### Ohio Parkinson Foundation

Central **Ohio Parkinsons Foundation** 2004 to present; Founded the Eastside **Parkinsons Support Group**. President 1991-1992. Established and ran a weekly **Parkinsons Exercise Group** from 1991-1995; 2004 to present;

**Oakwood Schools Foundation**

Formed to support Oakwood Schools – for educational items

**Oakwood High School**

1200 Far Hills Ave,

Dayton - (937) 297-5326

**Oakwood Sister City Association**

30 Park Ave,

Dayton, 45419 - (937) 299-6579

The Sister City Association fosters personal relationships between citizens of the City of Oakwood and our sister cities of LeVesinet, France and Outremont, Quebec, Canada. In addition, the Association encourages citizens to participate in programs that promote friendly relationships and mutual understandings between peoples of other countries. The Oakwood Sister City Association is a non-profit organization and does not receive direct funding from the City of Oakwood

**Ohio Law Enforcement Training Center**

3476 Park Street

Grove City, OH 43123

The Ohio Law Enforcement Training Center was established as a not-for-profit division of the Police Academy to meet the overwhelming demand for advanced police training state-wide.

**Ohio Troopers Coalition**

6161 Busch Boulevard, Suite 130, Columbus, Ohio 43229

Phone 1-800-544-7948

Fax 1-800-682-2855

The Ohio Troopers Coalition is the parent organization for the various organizations representing the State Troopers in the State of Ohio. It is made up of the Ohio State Troopers Association, Troopers for a Safer Ohio (TSO) and Ohio Troopers Caring.

**One More Soul**

1846 N Main St

Dayton, OH

937) 275-3896

Mission: A non-profit organization to counsel and support pregnant women.

**Opera Guild of Dayton**

P.O. Box 661

Dayton Ohio 45409-0661

937-640-0321

Mission: The Opera Guild is a nonprofit organization. The mission of The Opera Guild of Dayton is to encourage and promote opera in the Greater Dayton area and to support Dayton Opera through fundraising, marketing and educational activities.

**Optimist Club of Dayton**  
A non-profit service group serving the Dayton Community

**PFLAG of Dayton, Ohio**  
Promotes the health and well-being of gay, lesbian, bisexual and transgendered persons, their families and friends.

**Philmont Staff Association**  
Activity Centers Campaign  
17 Deer Run Road  
Cimarron, NM 87714

Mission: PSA unites the Philmont Staff—past and present—for the purpose of serving the adventure, heritage and experience of Philmont Scout Ranch and the Boy Scouts of America.

**Project Read**  
% Sinclair Community College  
444 West Third Street  
Room 12201  
Dayton, Ohio 45402-1460

A coalition of local literacy providers with the mission of building literacy through collaboration. Promoting skilled workers & Strong Families Through Literacy

**Santa Rosa Childrens Hospital**  
To Extend the Healing Ministry of Jesus Christ.

**St. Jude's Children's Memorial and Honor Program**  
501 St. Jude Place  
Memphis, TN 38105-1905

**St. Jude's Children's Research Hospital**  
501 St. Jude Place  
Memphis, TN 38105

**St. Leonard's Dementia Unit**  
St. Leonard Church  
8100 Clyo Road  
Centerville, Ohio

**St. Mary's Catholic Church**  
939 Charlotte Avenue  
Kalamazoo, MI 49048

**St. Paul's Episcopal Church**  
33 W. Dixon Avenue  
Dayton, Ohio 45419

**Salvation Army**

138 S. Wilkinson Street  
Dayton, OH 45402-1808

A non-profit organization dedicated to make life better for those in need by providing vital necessities such as food and help with utility payments, toys for disadvantaged children and sturdy clothes.

1/05/04 - # 263 -- \$100

Shriner's Crippled Children

A non-profit organization to provide care, treatment and care facilities for crippled and burned children.

Society for the Improvement of Conditions for Stray Animals  
PO Box 292463  
Kettering, OH 45429-2363

Mission: SICSA strives to assist every animal that comes into our program with the same level exceptional medical attention, love, and care. In fact, SISCA has been providing quality care and assistance to the animals of the Miami Valley for almost 30 years. In this time SICSA has assisted close to 60,000 dogs and cats and has touched countless lives through our community outreach programs.

Smith Memorial Gardens  
105 Patterson Road  
Dayton, Ohio 45419

A non-profit organization to ensure the preservation of the public area landmark.

Special Olympics Ohio  
3303 Winchester Pike  
Columbus, OH 43232

Mission: To provide year-round sports training and athletic competition in a variety of Olympic-type sports for children and adults with mental retardation, giving them continuing opportunities to develop physical fitness, demonstrate courage, experience joy, and participate in a sharing of gifts, skills and friendship with their families and other Special Olympics athletes and the community.

The Mission  
Honduras  
Father Emil Cook, OFM  
c/o Mission Honduras Trust  
US Bank  
910 W. Main Street,  
Troy, OH 45373

A non-profit missionary project of the Catholic Church

The New Mexico Zoological Society  
903 10th Street S.W.  
Albuquerque, New Mexico 87102

Shiloh Church (United Church of Christ)

5600 Main Street  
Dayton, Ohio 45415

The Smile Train  
245 Fifth Avenue, Suite 2201  
New York, NY 10016  
212-689-9199

**Mission:** The Smile Train is dedicated to helping the missions of children who suffer from cleft lip and palate through free surgery for children, free training for doctors and research to find a cure.

Think TV Network Channel 14/16  
Public Television station  
110 South Jefferson Street  
Dayton, Ohio 45402-2415  
937-220-1600

A nonprofit public television station.

USAF Museum Foundation  
1100 Spaatz Street, Wright-Patterson AFB, OH 45433-7102

The Air Force Museum Foundation is a 501c(3) nonprofit organization dedicated to:

- Foster and perpetuate the United States Air Force Museum as a medium for informing and educating the public on the history and heritage of the United States Air Force.
- Serve as a philanthropic corporation in assisting the development and expansion of the facilities of the United States Air Force Museum.
- Receive, hold, and administer gifts in the best interest of the United States Air Force Museum.

United States Olympic Committee  
1 Olympic Plaza  
Colorado Springs, CO 80909

United Way of the Greater Dayton Area  
(937) 225-3000  
184 Salem Ave  
Dayton, OH 45406

**Mission**

To improve lives by mobilizing the caring power of communities

University of Dayton Scholarship  
**University of Dayton Office of Financial Aid Scholarships** award by the **University of Dayton** for current or prospective students.

University of Cincinnati Foundation  
PO Box 19970  
Cincinnati, OH 45219-0970  
513-556-6781

**Louis M. Laushey Design Center Project**  
**Department of Civil and Environmental Engineering**

**University of Illinois Foundation**

The University of Illinois Foundation is a partner with university and campus staff to secure funding to maintain and improve the excellence of the University of Illinois.

**Victoria Theatre**  
138 North Main Street  
Dayton, OH 45402-1776

**Support of a historic non-profit community theatre to preserve the facility and to provide scholarship for students for performances.**

**Volunteers of America**  
Central Ohio  
PO Box 21536  
Columbus, OH 43221-0536

**Mission:** to help provide nutritious meals to hungry people and to support other critical important programs.

**WDPR/WDPG Dayton Public Radio**  
126 North Main Street  
Dayton, Ohio 45402  
937-496-3850

**Mission:** The mission of Dayton Public Radio is to provide classical and fine arts programming that is entertaining, educational, informative and emotionally stimulating.

**WMUB Miami University Public Radio**  
Division of University Advancement  
Murstein Alumni Center  
725 East Chestnut St.  
Oxford, OH 45056-2480  
513-529-5213

**WMUB Miami University Public Radio**  
Division of University Advancement  
Murstein Alumni Center  
725 East Chestnut St.  
Oxford, OH 45056-2480  
513-529-5213

**A nonprofit public radio Station from Miami University.**

**Widows Home Foundation**  
50 South Findlay Street  
Dayton, Ohio 45403  
937-252-1661

This Foundation exists to serve the needs of residents of Marca Terrace on the Campus of the widows home, which continues to serve low-income senior population the medical, nutritional, social and emotional care.

**Wright B. Flyer, Inc.**

*Wright "B" Flyer Inc.* is an all-volunteer, not-for-profit corporation that promotes the Dayton Region's aviation heritage by flying and displaying.

**Wright Dunbar Inc.**

The catalyst and facilitator for urban community and economic revitalization of the historic Wright-Dunbar village. Vision is to create a vibrant, urban, walkable community of innovation & creativity.

**Wright Memorial Public Library**  
1776 Far Hills Ave.  
Dayton (Oakwood), OH 45419

The Wright Memorial Public Library is a community focal point that helps fulfill patron needs for information and entertainment materials; meets the learning needs of patrons on topics related to work, school, and personal life; and encourages learning and intellectual growth from the earliest ages. The library provides high levels of efficient, friendly, personal service; and fosters an atmosphere of intellectual liberty in the American tradition of free ideas.

**Wright State University Foundation**  
3640 Colonel Glenn Hwy  
Dayton, OH 45435-00001  
937-775-2251

College of Engineering and Computer Science Program Fund  
Wright STEPP Program Fund to support the best educational opportunities to the next generation of leaders.

**YMCA Camp Kern Scholarship Fund**  
5291 St. Rt. 350  
Oregonia OH 45054

**YES College Preparatory School**  
"Whatever it Takes"  
353 Crenshaw Road  
Houston, Texas 77034  
713-910-2510

Core Purpose: Cultivating educational excellence within under-served communities.

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form)

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

**Part II** Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

Type or print  File by the due date for filing your return. See instructions	<p>Name of Exempt Organization  <b>BILL AND JACKIE LOCKWOOD FAMILY FOUNDATION</b> </p> <p>Number, street, and room or suite no. If a P.O. box, see instructions.  <b>239 SPIREA DRIVE</b> </p> <p>City, town or post office, state, and ZIP code. For a foreign address, see instructions.  <b>DAYTON OH 45419-3540</b> </p>	<p>Employer identification number  <b>03-6100828</b> </p>
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**Check type of return to be filed (file a separate application for each return):**

<input type="checkbox"/> Form 990	<input type="checkbox"/> Form 990-T (corporation)
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust)
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)
<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A

- Form 4720
- Form 5227
- Form 6069
- Form 8870

- The books are in the care of ► WILLIAM D. LOCKWOOD

Telephone No. ► 937-294-8318

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box  ► . If it is for part of the group, check this box  ►  and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15/10, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- calendar year 2009 or
- tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

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

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	244
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions.	<b>3c</b>	\$	0

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

**For Privacy Act and Paperwork Reduction Act Notice, see Instructions.**

Form 8868 (Rev. 4-2009)

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

► 

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

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

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

<b>Type or print</b> <b>File by the extended due date for filing the return. See instructions</b>	Name of Exempt Organization <b>BILL AND JACKIE LOCKWOOD FAMILY FOUNDATION</b>		Employer identification number <b>03-6100828</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>239 SPIREA DRIVE</b>		For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>DAYTON OH 45419-3540</b>		

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

<input type="checkbox"/> Form 990	<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 6069
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust)	<input type="checkbox"/> Form 4720	<input type="checkbox"/> Form 8870
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 5227	

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

- The books are in the care of ► **WILLIAM D. LOCKWOOD**  
Telephone No. ► **937-294-8318** FAX No ►
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box ►  . If it is for part of the group, check this box ►  and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **11/15/10**.

5 For calendar year **2009**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

7 State in detail why you need the extension

**ADDITIONAL TIME IS REQUESTED TO GATHER INFORMATION TO PREPARE A COMPLETE AND ACCURATE RETURN.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a \$ <b>0</b>
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b \$ <b>244</b>
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c \$ <b>0</b>

**Signature and Verification**

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

Signature ►

Title ►

Date ►

Form **8868** (Rev 4-2009)

  
**RICHARD CORDRAY**  
OHIO ATTORNEY GENERAL

**VERIFICATION OF FILING WITH THE INTERNAL REVENUE SERVICE**

This form is to be completed by 501(c)(3) non-profit organizations, located in Ohio, that file one of the federal tax forms listed below. NOTE: This form should be filed in lieu of a copy of the federal tax return. Do not submit the federal return with this form.

I hereby certify that I am a trustee or officer of

**BILL AND JACKIE LOCKWOOD FAMILY FOUNDATION**

(Name of Organization as filed with the Attorney General's Office)

239 SPIREA DRIVE

DAYTON

45419-3540

Charity Street Address

City

Zip Code

03-6100828

(Federal Employer Identification Number)

(State Charter Number if applicable)

and that the above named organization completed and/or will complete and file: (check one)

Form 990       Form 990-PF       Form 990-EZ       Form 990-N (e-Postcard)

required by the Internal Revenue Service for the: (check and complete one of the following)

calendar year 2 009 \_

tax year beginning \_\_\_\_\_, 2 \_ \_ \_, and ending \_\_\_\_\_, 2 \_ \_ \_

and that such filing occurred on/or will occur on 11/15/2010  
(Filing Date)

Did the organization request a federal extension of time to file this report?  Y     N

If yes, what was/is the extended due date? 11/15/2010

(Federal Extended Due Date)

For fee purposes, please indicate the current total value of assets, or if filing this form prior to an extended federal due date, estimate the current total value of assets, at year end \$ 3,070,609

William Lockwood

Name of Trustee/Officer (Please Print)

W. Lockwood

Signature of Trustee/Officer

Trustee

Trustee/Officer Title

11/15/10

Date

VFIRS/Revised 6/09

937 294 8318

Telephone number

wlockwood@woh.rr.com

Charitable Organization E-mail Address

**OFFICE USE ONLY**  
FILING FEE PAID

Amount \_\_\_\_\_

Date \_\_\_\_\_

Check # \_\_\_\_\_

Charitable Law Section

150 East Gay St 23rd Fl • Columbus, Ohio 43215 • PHONE 614.466-3181 • FAX 614.466-9788 • [www.ohioattorneygeneral.gov](http://www.ohioattorneygeneral.gov)