Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

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: ALLAN LOUIS LOEB FOUNDATION

Number and street (or P O box number if mail is not delivered to street address): 38 Wilford Road — Room/suite

City or town, state, and ZIP code: Branford CT 06405

A Employer identification number: 04-3613060

B Telephone number (see page 10 of the instructions): 203-481-4995

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: [X] 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) ▶ $ 27,505

J Accounting method. [X] Cash ☐ Accrual ☐ Other (specify) (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)
Revenue					
1	Contributions, gifts, grants, etc , received (attach schedule)				
2	Check ▶ [X] if the foundation is **not** required to attach Sch B				
3	Interest on savings and temporary cash investments	22	22		
4	Dividends and interest from securities	14,055	14,055		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-44,179			
b	Gross sales price for all assets on line 6a 191,269				
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	-30,102	14,077	0	
Operating and Administrative Expenses					
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 1	900	900		
c	Other professional fees (attach schedule) Stmt 2	4,258	4,258		
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions) Stmt 3	2,440	2,440		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	121	121		
22	Printing and publications				
23	Other expenses (att. sch.)				
24	**Total operating and administrative expenses.** Add lines 13 through 23	7,719	7,719		0
25	Contributions, gifts, grants paid	29,162			29,162
26	**Total expenses and disbursements.** Add lines 24 and 25	36,881	7,719	0	29,162
27	Subtract line 26 from line 12.				
a	**Excess of revenue over expenses and disbursements**	-66,983			
b	**Net investment income** (if negative, enter -0-)		6,358		
c	**Adjusted net income** (if negative, enter -0-)			0	

SCANNED JUN 2 4 2010

RECEIVED JUN 0 7 2010 OGDEN, UT IRS-OSC

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

DAA

9

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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash—non-interest-bearing			
2	Savings and temporary cash investments	21,375	27,505	27,505
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)			
b	Investments—corporate stock (attach schedule) See Stmt 4	661,287	554,427	
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)	682,662	581,932	27,505
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 ▶ [X] and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted	682,662	581,932	
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] 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			
30	**Total net assets or fund balances** (see page 17 of the instructions)	682,662	581,932	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	682,662	581,932	

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	682,662
2	Enter amount from Part I, line 27a	2	-66,983
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	615,679
5	Decreases not included in line 2 (itemize) ▶ See Statement 5	5	33,747
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	581,932

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	See attached - Bancnorth 12647870	P	Various	Various
b	See attached - Bancnorth 12647870	P	Various	Various
c	TD Wealth Management			
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	80,826		112,021	-31,195
b	109,508		123,427	-13,919
c	935			935
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				-31,195
b				-13,919
c				935
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	-44,179
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	27,926	580,151	0.048136
2007	30,122	680,443	0.044268
2006	29,129	650,808	0.044758
2005	7,000	602,239	0.011623
2004	20,000	582,016	0.034363

2 **Total** of line 1, column (d)	2	0.183148
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	0.036630
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	563,347
5 Multiply line 4 by line 3	5	20,635
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	64
7 Add lines 5 and 6	7	20,699
8 Enter qualifying distributions from Part XII, line 4	8	29,162

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 ▶ [X] and enter 1% of Part I, line 27b	1	64
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	64
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	64
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 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	
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	64
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 2010 estimated tax** ▶ Refunded ▶	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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	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.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. **(1)** On the foundation. ▶ $ ______ **(2)** On foundation managers. ▶ $ ______			
e	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	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ None			
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	8b	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ ANN WHITAKER Telephone no. ▶ 203-481-4995
38 WILFORD ROAD
Located at ▶ BRANFORD, CT ZIP+4 ▶ 06405

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

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?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ 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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
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?	☐ Yes ☒ 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?	☐ Yes ☒ 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?		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 2009?		4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ 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 page 22 of the 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 | | X

If "Yes" to 6b, 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 (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
See Statement 6				

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 ▶ 0

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

3 Five highest-paid independent contractors for professional services (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 ▶ 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 (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 ▶	

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	542,464
b	Average of monthly cash balances			1b	29,462
c	Fair market value of all other assets (see page 24 of the instructions)			1c	0
d	**Total** (add lines 1a, b, and c)			1d	571,926
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	571,926
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)			4	8,579
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	563,347
6	**Minimum investment return.** Enter 5% of line 5			6	28,167

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	28,167
2a	Tax on investment income for 2009 from Part VI, line 5	2a	64		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	64
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	28,103
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	28,103
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	28,103

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	29,162
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	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	29,162
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	64
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	29,098

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 XIII 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					28,103
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					
b From 2005	1,081				
c From 2006	16,632				
d From 2007	11,722				
e From 2008	5,058				
f **Total** of lines 3a through e		34,493			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 29,162					
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					28,103
e Remaining amount distributed out of corpus		1,059			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)					
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		35,552			
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		35,552			
10 Analysis of line 9.					
a Excess from 2005	1,081				
b Excess from 2006	16,632				
c Excess from 2007	11,722				
d Excess from 2008	5,058				
e Excess from 2009	1,059				

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 ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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)(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 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).)

N/A

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 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
a Paid during the year				
Greater New Haven Cat Pro PO Box 1432 New Haven CT 06506		care of	wildlife	3,500
Branford Compassion Club PO Box 768 Branford CT 06405		care of	wildlife	3,500
Wind over Wings 22 Old Road Clinton CT 06413		care of	wildlife	2,254
James Blackstone Memorial Main Street Branford CT 06405		care of	wildlife	2,500
HORSE of Connecticut 43 Wilbur Rd Washington CT 06777		care of	wildlife	5,000
Friends of New Haven Anim 81 Fournier St New Haven CT 06532		care of	wildlife	3,458
Hope Alliance, Inc. 88 Morse Place New Haven CT 06512		care of	wildlife	3,500
A Place Called Hope, Inc. 254 Roast Meat Hill Rd Killingworth CT 06419		care of	wildlife	4,200
Animal Alliance Welfare P.O. Box 1775 New Britain CT 06050		care of	wildlife	1,000
Best Friends Animal		care of	wildlife	250
Total			▶ 3a	29,162
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
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			14	22	
4 Dividends and interest from securities			14	14,055	
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	-44,179	
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		-30,102	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 -30,102

(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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

(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		

Sign Here

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

L. Allen Whitaker June 3, 10 President

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature	Date 06/01/10	Check if self-employed ▶ ☒	Preparer's identifying number (see Signature on page 30 of the instructions) P00201198
Firm's name (or yours if self-employed), address, and ZIP code	Brierley, Cadwell & Possidente, LLC 741 Boston Post Rd Ste 307 Guilford, CT 06437-2638	EIN ▶ 20-4202056	Phone no 203-453-2989

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Accounting Fees	$ 900	$ 900	$	$
Total	$ 900	$ 900	$ 0	$ 0

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Investment advisory fee	$ 4,258	$ 4,258	$	$
Total	$ 4,258	$ 4,258	$ 0	$ 0

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

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
federal tax 2008	$ 188	$ 188	$	$
federal tax prior years	2,252	2,252		
Total	$ 2,440	$ 2,440	$ 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
Alliance Ber Bal Wealth Str A	$ 250,000	$ 192,730	Market	$
Alliance Ber Intl Value Adv	12,159		Market	
American Amcap F-1	26,589		Market	
American Bond Fd of Amer F	90,148		Market	
American Capital World Bd F	13,035		Market	
DWS Capital Growth S	15,404		Market	
American Europac Growth F1	29,630		Market	
Fidelity Adv Equity Value I	12,570	11,328	Market	
Fidelity Adv Value I	16,530	26,729	Market	
Franklin Total Return Adv	60,584		Market	
Hartford Small Company I	7,381		Market	
ING Intermediate Bond W	20,714		Market	
Oppenheimer Main St Sm Cap A	23,056	11,572	Market	
Pioneer Fund A	29,172	26,300	Market	
Pioneer Cullen Value A	54,315	52,522	Market	
Allianz NFJ Intlt Value A		11,199	Market	
American AMCAP Fund F2		18,966	Market	
American Europac Grwth F2		25,839	Market	
Fidelity Adv Small Cap Cl I		7,574	Market	
Franklin Flex Cap Grwth Advisor		15,256	Market	
American Bond Fund of America F2		51,674	Market	
American Capital World Bond F2		10,864	Market	
PIMCO Total Return Class A		91,874	Market	
Total	$ 661,287	$ 554,427		$ 0

Federal Statements

Statement 5 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
unrealized loss on investments	$ 33,747
Total	$ 33,747

Federal Statements

Statement 6 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
L ANN WHITAKER 38 WILFORD RD BRANFORD CT 06405	PRESIDENT	3.00	0	0	0
JOHN T DILLON 64 BOSTON ST GUILFORD CT 06437	DIRECTOR	3.00	0	0	0
THOMAS R WHITAKER 38 WILFORD RD GUILFORD CT 06437	DIRECTOR	3.00	0	0	0
JOHN LOEB 130 JOHNSONS POINT RD BRANFORD CT 06405	DIRECTOR	3.00	0	0	0
THERESA PIERSON 123 COUNTRY WAY GUILFORD CT 06437	SECRETARY	3.00	0	0	0
DAVID WALLACH 45 Carriage Drive Durham CT 06422	TREASURER	3.00	0	0	0

Allan Louis Loeb Foundation **EIN 04-3613060**
Schedule D-1 **For the Period 1/1/2009 through 12/31/2009**

No. of Unit:	Description	Cost Basis	Purchase Date	Proceeds	Sale Date	Gain/(Loss)
Long Term						
46.05	Pioneer A	1,940.67	1/23/2008	1,291.80	7/10/2009	(648.87)
81.25	American Funds EuroPacific Gr F-2	3,545.20	1/23/2008	2,463.37	7/10/2009	(1,081.83)
150.96	Pioneer Cullen Value A	2,957.35	1/23/2008	2,051.58	7/10/2009	(905.77)
163.33	Fidelity Advisor Equity Value I	1,685.58	3/19/2008	1,060.02	7/10/2009	(625.56)
172.69	American Funds Capital World Bond F-2	3,454.98	1/23/2008	3,030.73	3/4/2009	(424.25)
200.58	Oppenheimer Main St Small Cap A	3,526.11	1/23/2008	2,603.46	7/10/2009	(922.65)
292.77	American Funds AMCAP F-2	5,434.14	1/23/2008	2,983.34	3/4/2009	(2,450.80)
320.22	Oppenheimer Main St Small Cap A	5,629.41	1/23/2008	2,846.73	3/4/2009	(2,782.68)
623.83	AllianceBern Intl Val Adv	10,218.41	1/23/2008	4,959.43	3/4/2009	(5,258.98)
1,276.30	Fidelity Advisor Value I	14,536.97	1/23/2008	7,300.41	3/4/2009	(7,236.56)
3,212.35	American Funds Bond Fund of Amer F-2	40,074.51	1/23/2008	33,665.42	3/4/2009	(6,409.09)
39.51	Oppenheimer Main St Sm Cap A	694.50	1/23/2008	630.89	11/16/2009	(63.61)
68.24	Pioneer Fund A	2,875.51	1/23/2008	2,400.57	11/16/2009	(474.94)
86.47	Fidelity Adv Equity Value I	892.37	3/19/2008	725.48	11/16/2009	(166.89)
265.65	Pioneer Cullen Value A	5,204.01	1/23/2008	4,385.81	11/16/2009	(818.20)
94.82	American AMCAP F2	1,754.24	1/23/2008	1,537.10	11/16/2009	(217.14)
44.64	American Capital world Bond F2	890.93	1/23/2008	918.17	11/16/2009	27.24
43.73	American EuroPacific Grwth F2	1,958.01	1/23/2008	1,709.22	11/16/2009	(248.79)
359.97	American Bond Fd of America F2	4,748.02	1/23/2008	4,262.06	11/16/2009	(485.96)
	Long Term Total:	112,020.91		80,825.59		(31,195.32)
Short Term						
1.18	ING Intermediate Bond W	11.73	6/30/2008	9.74	3/4/2009	(1.99)
2.05	DWS Capital Growth S	76.58	12/18/2008	67.32	3/4/2009	(9.26)
4.13	ING Intermediate Bond W	35.39	12/31/2008	34.11	3/4/2009	(1.28)
4.76	Franklin Total Return Adv	46.87	3/31/2008	40.87	3/4/2009	(6.00)
4.85	ING Intermediate Bond W	41.13	1/30/2009	39.97	3/4/2009	(1.16)
7.50	ING Intermediate Bond W	72.81	7/31/2008	61.86	3/4/2009	(10.95)
7.52	Fidelity Advisor Value I	53.60	12/5/2008	43.00	3/4/2009	(10.60)
7.95	ING Intermediate Bond W	69.61	11/28/2008	65.55	3/4/2009	(4.06)
8.12	ING Intermediate Bond W	75.48	9/30/2008	66.96	3/4/2009	(8.52)
8.16	ING Intermediate Bond W	67.67	2/27/2009	67.34	3/4/2009	(0.33)
12.13	ING Intermediate Bond W	117.03	8/29/2008	100.05	3/4/2009	(16.98)
14.30	ING Intermediate Bond W	127.98	10/31/2008	117.97	3/4/2009	(10.01)
22.79	Franklin Total Return Adv	225.66	4/30/2008	195.57	3/4/2009	(30.09)

Allan Louis Loeb Foundation
Schedule D-1

EIN 04-3613060
For the Period 1/1/2009 through 12/31/2009

No. of Units	Description	Cost Basis	Purchase Date	Proceeds	Sale Date	Gain/(Loss)
23.00	Franklin Total Return Adv	225.37	5/30/2008	197.31	3/4/2009	(28.06)
26.59	Franklin Total Return Adv	252.35	8/29/2008	228.15	3/4/2009	(24.20)
26.78	Franklin Total Return Adv	230.34	11/28/2008	229.81	3/4/2009	(0.53)
26.89	Franklin Total Return Adv	235.53	1/30/2009	230.69	3/4/2009	(4.84)
27.74	Franklin Total Return Adv	238.83	2/27/2009	238.00	3/4/2009	(0.83)
28.74	Franklin Total Return Adv	262.41	9/30/2008	246.61	3/4/2009	(15.80)
28.74	Franklin Total Return Adv	273.63	7/31/2008	246.61	3/4/2009	(27.02)
28.91	Franklin Total Return Adv	248.94	10/31/2000	248.07	3/4/2009	(0.87)
29.13	Franklin Total Return Adv	280.84	6/30/2008	249.96	3/4/2009	(30.88)
30.54	Franklin Total Return Adv	266.27	12/31/2008	262.00	3/4/2009	(4.27)
32.03	Allianz NFJ Small Cap Value A	449.00	3/6/2009	591.52	3/4/2009	142.52
63.80	Franklin Total Return Adv	616.32	6/19/2008	547.41	3/4/2009	(68.91)
64.88	ING Intermediate Bond W	554.10	12/29/2008	535.28	3/4/2009	(18.82)
119.34	Fidelity Value	3,336.69	3/6/2009	4,879.74	3/4/2009	1,543.05
121.73	Franklin Foex Cap Growth Adv	3,163.63	3/6/2009	3,964.57	3/4/2009	800.94
127.94	Allianz NFJ International Value A	1,324.16	3/6/2009	1,855.10	3/4/2009	530.94
147.03	Franklin Total Return Adv	1,282.08	12/31/2008	1,261.50	3/4/2009	(20.58)
299.36	DWS Capital Growth S	15,327.29	3/19/2008	9,816.05	3/4/2009	(5,511.24)
426.38	Hartford Small Company I	7,380.69	3/19/2008	4,242.51	3/4/2009	(3,138.18)
1,996.49	ING Intermediate Bond W	19,685.39	3/19/2008	16,471.05	3/4/2009	(3,214.34)
5,910.35	Franklin Total Return Adv	57,921.40	3/19/2008	50,710.78	3/4/2009	(7,210.62)
9.67	Fidelity Adv Small Cap I			215.82	11/16/2009	215.82
27.58	Fidelity Value	771.14	3/6/2009	1,535.64	11/16/2009	764.50
688.27	PIMCO Total Return A	6,834.52	3/6/2009	7,536.56	11/16/2009	702.04
44.01	Allianz NFJ Intl Value A	455.49	3/6/2009	824.72	11/16/2009	369.23
30.38	Franklin Flex Cap Growth Adv	789.52	3/6/2009	1,232.45	11/16/2009	442.93
	Short Term Total	123,427.48		109,508.22		(13,919.26)

Bancnorth Investment Group
Account # 12647870

	Cost Basis	Proceeds	Gain/(Loss)
Long-Term Gain/(Loss)	112,020.91	80,825.59	(31,195.32)
Short-Term Gain/(Loss)	123,427.48	109,508.22	(13,919.26)

14/2010 2 40 PM

8868

(Rev April 2009)

Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- 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 I **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 and click on e-file for Charities & Nonprofits.

Type or print File by the due date for filing your return See instructions	Name of Exempt Organization ALLAN LOUIS LOEB FOUNDATION	Employer identification number 04-3613060
	Number, street, and room or suite no. If a P.O. box, see instructions 38 Wilford Road	
	City, town or post office, state, and ZIP code For a foreign address, see instructions Branford CT 06405	

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

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

- The books are in the care of ▶ ANN WHITAKER

Telephone No. ▶ 203-481-4995 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:

▶ [X] 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

3a	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	3a	$ 0
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.	3b	$ 0
c	**Balance Due.** 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.	3c	$ 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)

DAA