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

OMB No 1545-0052

2009

Department of the Treasury Internal Revenue Service

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

For calendar year 2009, or tax year beginning

2009, and ending

FUI Can	endar year 2005, or tax year beginning	, 2003	, and ending				
G Che	eck all that apply: Initial return Initial	al Return o <u>f a</u> former p	ublic charity	☐ Fina	al return		
	Amended return	Address	change Name o	change			
Use ti	na l		A	Employer Identification nun	nber		
IRS lat	el THE BRAITMAYER FOUNDATION			04-6112131			
Otherw	, o, o implication impulsion a li		В	Telephone number (see the	instructions)		
print or typ	a 1145 PROMI DI. 1.0. DON 5/	6		508-748-1665			
See Spe	cific MARION, MA U2/38		C	If exemption application is	pending, check here		
Instructi	ons.		D	1 Foreign organizations, chec	k here.		
<b>H</b> C	heck type of organization: X Section 501	(c)(3) exempt private for	oundation	2 Foreign organizations meet here and attach computation	ing the 85% test, check		
	Section 4947(a)(1) nonexempt charitable tru		private foundation				
	ir market value of all assets at end of year J Acco	ounting method: X C	ash Accrual E	If private foundation status under section 507(b)(1)(A)			
(fi	rom Part II, column (c), line 16)	Other (specify)		If the foundation is in a 60-			
<b>⊳</b> \$		column (d) must be on	cash basis )	under section 507(b)(1)(B)	, check here		
Part I	Analysis of Revenue and	(a) Revenue and	<b>(b)</b> Net investment	(c) Adjusted net	(d) Disbursements		
	Expenses (The total of amounts in	expenses per books	income	income	for charitable		
	columns (b), (c), and (d) may not neces- sarily equal the amounts in column (a)				purposes (cash basis only)		
	(see the instructions) )				(cash basis only)		
	Contributions, gifts, grants, etc, received (att sch)						
	2 Ck ► X if the foundn is <b>not</b> req to att Sch B						
	Interest on savings and temporary cash investments	2,423.	2 422	2,423.			
	4 Dividends and interest from securities	72,515.	2,423. 72,515.	72,515.			
	<b>5a</b> Gross rents	,2,010.	,2,515.	, 2, 313.			
	<b>b</b> Net rental income or (loss) .						
R	6a Net gain/(loss) from sale of assets not on line 10	-32,259.					
E	b Gross sales price for all 330, 854.						
Ě	7 Capital gain net income (from Part IV, line 2)		receiven O.				
Ë	8 Net short-term capital gain		1 P. C.	0.			
F	9 Income modifications		22 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	įς :			
_	10 a Gross sales less returns and allowances	<u> </u>	APR 1 5 2010	Ĭ,			
	b Less Cost of				***************************************		
	goods sold		VINEN III	4			
	c Gross profit/(loss) (att sch).  11 Other income (attach schedule)	<u> </u>	VOIDE IS ON				
	II Other income (attach schedule)						
	12 Total. Add lines 1 through 11	42,679.	74,938.	74,938.			
	13 Compensation of officers, directors, trustees, etc	14,000.	74,500.	74,330.	14,000.		
	14 Other employee salaries and wages	•			<u> </u>		
	15 Pension plans, employee benefits						
A	16a Legal fees (attach schedule).						
D	<b>b</b> Accounting fees (attach sch) SEE ST 1	2,950.	2,950.				
i N	<b>c</b> Other prof fees (attach sch) SEE ST 2	63,173.	25,256.		37,917.		
O Ï	17 Interest						
APBEN BELUNHAGO	18 Taxes (attach schedule) SEE STMT 3	1,810.	1,740.		70.		
	19 Depreciation (attach sch) and depletion						
7	20 Occupancy	<del></del>	<del></del> -	<u>-</u>			
<i>⊆</i> G Ě	21 Travel, conferences, and meetings	18,161.					
À E	22 Printing and publications						
<sup></sup> 준입 및	23 Other expenses (attach schedule)				<del>-</del>		
A E	SEE STATEMENT 4	44.					
	24 Total operating and administrative	100 100	20.046		E1 007		
i s	expenses. Add lines 13 through 23 25 Contributions, gifts, grants paid PART XV	100,138.	29,946.		51,987. 120,000.		
姜		120,000.					
SCANNED	26 Total expenses and disbursements. Add lines 24 and 25.	220,138.	29,946.	0.	171,987.		
Q	27 Subtract line 26 from line 12:	, <b></b> - ,	,		= 1		
GD.	a Excess of revenue over expenses	455 456					
	and disbursements	-177,459.	44 000				
	b Net Investment Income (if negative, enter -0-)		44,992.	74 020			
	C Adjusted net Income (if negative, enter -0-)			74,938.			

	(see the instructions)	3,167,059.	2,989,600.	
Par	t III Analysis of Changes in Net Assets or Fund Bal	ances		
1	Total net assets or fund balances at beginning of year — Part II, of end-of-year figure reported on prior year's return)	column (a), line 30 (must agree	e with	3,167,059
2	Enter amount from Part I, line 27a		2	-177,459
3	Other increases not included in line 2 (itemize)		3	· <del>-</del>
4	Add lines 1, 2, and 3		4	2,989,600.
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 3	30 6	2,989,600.

3,167,059

3,167,059.

2,989,600

2,989,600.

ANCES Š

30

31

0 Ř Capital stock, trust principal, or current funds

28 Paid-in or capital surplus, or land, building, and equipment fund

Total liabilities and net assets/fund balances

Retained earnings, accumulated income, endowment, or other funds .

Total net assets or fund balances (see the instructions)

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)				(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
	SEE STATEMENT 8			D — Donation		
					-	
<u>b</u>		<del></del>				
<u>c</u>					<u> </u>	
<del></del>		( Deprogration allowed	(a) Cost or other house	.	<b>4</b> 2 Court or	(1000)
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (e) plus (f) m	
a						
<u>b</u>	<u> </u>					
<u>c</u>						
d	<del></del>					
	Complete only for assets shown	ng gain in column (h) and owned by t	ne foundation on 12/31/69		(I) Gains (Colu	ımn (h)
	(f) Fair Market Value as of 12/31/69	<b>①</b> Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any		gain minus column (k han -0-) <b>or</b> Losses (fro	
a			<del></del>			
<u> </u>						
c						
e						
	Capital gain net income or (net	capital loss).   If gain, also If (loss), entropy on the control of the control o	enter in Part I, line 7 er -0- in Part I, line 7	2		-32,259.
_		8, column (c) (see the instructions). I	· · · —	3		-11,363.
Parl		r Section 4940(e) for Reduced	Tay on Net Investmen	_	·	11/000.
If Yes	s,' the foundation does not quali	ion 4942 tax on the distributable amoi	int of any year in the base ne	riod?		
<u> </u>	chier the appropriate amount in	fy under section 4940(e). Do not comp	olete this part.		Yes	X No
		each column for each year; see the	olete this part. Instructions before making any			X No
	(a) Base period years Calendar year (or tax year beginning in)		olete this part.	y entries.	(d) Distribution	ratio
	(a) Base period years Calendar year (or tax year beginning in)	each column for each year; see the (b) Adjusted qualifying distributions	olete this part.  nstructions before making any (c)  Net value of noncharitable-use asset	y entries.	(d) Distribution	ratio by column (c))
	(a) Base period years Calendar year (or tax year	n each column for each year; see the	olete this part.  nstructions before making any (c)  Net value of	y entries.	(d) Distribution	ratio
	(a) Base period years Calendar year (or tax year beginning in) 2008	(b) Adjusted qualifying distributions  204, 431.	nstructions before making any (c) Net value of noncharitable-use asset	y entries. (col., 413., 338.	(d) Distribution	ratio by column (c))
	(a) Base period years Calendar year (or tax year beginning in) 2008 2007	h each column for each year; see the (b) Adjusted qualifying distributions  204, 431. 212, 795.	olete this part.  nstructions before making any (c) Net value of noncharitable-use asset 4,269, 4,677,	y entries. (col., 413., 338., 121.	(d) Distribution	ratio by column (c)) 0.047883 0.045495
	(a) Base period years Calendar year (or tax year beginning in) 2008 2007 2006	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865.	olete this part.  nstructions before making any (c) Net value of noncharitable-use asset 4, 269, 4, 677, 4, 542,	y entries. (col., 413., 338., 121., 584.	(d) Distribution	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317
	(a) Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276.	olete this part.  nstructions before making any (c) Net value of noncharitable-use asset  4, 269, 4, 677, 4, 542, 4, 517,	y entries. (col., 413., 338., 121., 584., 522.	(d) Distribution	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561
	(a) Base period years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d)	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865. 204, 545.	olete this part.  nstructions before making any (c)  Net value of noncharitable-use asset  4, 269, 4, 677, 4, 542, 4, 517, 4, 489,	y entries. (col., 413., 338., 121., 584.	(d) Distribution	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317
2 3	(a) Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d) Average distribution ratio for the	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865.	olete this part.  nstructions before making any (c)  Net value of noncharitable-use asset  4, 269, 4, 677, 4, 542, 4, 517, 4, 489,  on line 2 by 5, or by the	y entries. (col., 413., 338., 121., 584., 522.	(d) Distribution	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561
2	(a) Base period years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for the number of years the foundation	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865. 204, 545.	A, 269, 4, 677, 4, 542, 4, 489, on line 2 by 5, or by the ears	y entries. (col., 413., 338., 121., 584., 522.	(d) Distribution fumn (b) divided t	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561 0.239211
2 3	(a) Base period years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for the number of years the foundation	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865. 204, 545.	A, 269, 4, 677, 4, 542, 4, 489, on line 2 by 5, or by the ears	y entries. (col., 413., 338., 121., 584., 522.	(d) Distribution fumn (b) divided t	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561 0.239211 0.047842
2 3	(a) Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of noncharit	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865. 204, 545.  25-year base period – divide the total has been in existence if less than 5 y able-use assets for 2009 from Part X,	A, 269, 4, 677, 4, 542, 4, 489, on line 2 by 5, or by the ears	y entries. (col., 413., 338., 121., 584., 522.	(d) Distribution fumn (b) divided t	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561 0.239211 0.047842 ,605,119.
2 3 4 5 6	Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation  Enter the net value of noncharit  Multiply line 4 by line 3	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865. 204, 545.  25-year base period – divide the total has been in existence if less than 5 y able-use assets for 2009 from Part X,	A, 269, 4, 677, 4, 542, 4, 489, on line 2 by 5, or by the ears	y entries. (col., 413., 338., 121., 584., 522.	(d) Distribution fumn (b) divided t	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561 0.239211 0.047842 ,605,119. 172,476.
2 3 4 5 6 7	Base period years Calendar year (or tax year beginning in)  2008  2007  2006  2005  2004  Total of line 1, column (d)  Average distribution ratio for the number of years the foundation  Enter the net value of noncharit  Multiply line 4 by line 3  Enter 1% of net investment income	Adjusted qualifying distributions  204, 431. 212, 795. 213, 276. 240, 865. 204, 545.  25-year base period — divide the total has been in existence if less than 5 years.  209, 209, 209, 209, 209, 209, 209, 209,	A, 269, 4, 677, 4, 542, 4, 489, on line 2 by 5, or by the ears	y entries. (col., 413., 338., 121., 584., 522.  2 3 4 5	(d) Distribution fumn (b) divided t	ratio by column (c)) 0.047883 0.045495 0.046955 0.053317 0.045561 0.239211 0.047842 ,605,119. 172,476. 450.

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	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the in	structions)		
14	Exempt operating foundations described in section 4940(d)(2), check here .			
_	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)			
	b Domestic foundations that meet the section 4940(e) requirements in Part V,	ļ		<u>900.</u>
	check here. Land 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, column (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable	<u> </u>		^
2	foundations only. Others enter -0-)	<del></del>		<u>0.</u> 900.
	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			<del>900.</del>
6	Credits/Payments:			<del>900.</del>
	a 2009 estimated tax pmts and 2008 overpayment credited to 2009   6a   4,074.			
	Exempt foreign organizations — tax withheld at source			
	Tax paid with application for extension of time to file (Form 8868) 6c			
	Backup withholding erroneously withheld			
	Total credits and payments. Add lines 6a through 6d		4.	074.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here  if Form 2220 is attached 8			<del>~ , ~ .</del>
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		3.	$\frac{3.}{174.}$
11	Enter the amount of line 10 to be. Credited to 2010 estimated tax > 3,174. Refunded > 11			0.
Par	t VII-A Statements Regarding Activities			
18	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	Yes	No X
ŧ	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes			
	(see the instructions for definition)?.	<u>16</u>	<u> </u>	X
	If the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		•	
	Did the foundation file Form 1120-POL for this year?	1.	İ	v
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	1 <u>c</u>	-	X
	(1) On the foundation $\Rightarrow$ 0. (2) On foundation managers $\Rightarrow$ \$	0.		I
•	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on		I	
_	foundation managers \$ 0.		ŧ	١
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	<u> </u>	X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles		Ī	•
	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	. 3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	. 4a	_	X
Ł	olf 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?	<u>4b</u>	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
_	If 'Yes,' attach the statement required by General Instruction T		I	
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 remains in the enverging party month?			v
7	with the state law remain in the governing instrument?  Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	Х	X
	Enter the states to which the foundation reports or with which it is registered (see the instructions)		<u> </u>	<del>-</del>
	N/A	_		
t	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G? If 'No,' attach explanation</i>	8b	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(6) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part X	5) // <b>9</b> _		Х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		х
BAA		Form 99	0-PF	

Form 990-PF (2009) THE BRAITMAYER FOUNDATION	04-6112131	L	F	Page 5
Patt VII-A   Statements Regarding Activities Continued				
At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)		11		Х
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 exemp	ition application?	13	Х	<del>                                     </del>
Website address ► N/A				
14 The books are in care of ► AMERICAN RESEARCH & MANAGEMENT Telep	hone no. ► 508-74	8-1	665	
Located at ► 145 FRONT STREET MARION, MA ZIP +				
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check he	re	N/A	<b>-</b>	
and enter the amount of tax-exempt interest received or accrued during the year	▶ 15			N/A
Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Require	<u>d</u>			
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 X No	ı		l
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No	I		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?.	Yes X No	I		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes X No			
(5) Agree to pay manay or preparty to a government official? (Exception Check 'No.' of the		ı		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	Yes X No			
<b>b</b> If any answer is 'Yes' to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instru	in loctions)?	1ь	N	A
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 act that were not corrected before the first day of the tax year beginning in 2009?	- 1	1c		х
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)):				
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 X No			
If 'Yes,' list the years ▶ 20 , 20 , 20		- 1		ĺ
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 49 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 49)	142(a)(2) 12(a)(2) to	ı		
all years listed, answer 'No' and attach statement — see the instructions.)		2Ь	N	/ <u>A</u>
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the year  ▶ 20 , 20 , 20	s here.			
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X No			
<b>b</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 appropriate to Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; of 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)	oved or	3b	N	/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
<b>b</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		Х
BAA	For	n <b>99</b> 0	)-PF (	2009)

Part VIII.	Form 990-PF (2009) THE BRAITMAYER FO				112131	Page
(a) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(a))?      Vest   No.	Part VII-B   Statements Regarding Activity	ties for Which For	m 4720 May Be Re	quired (continue	d)	
On Influence the autocome of any speech public election (see section 4955); or to carry on, directly or indirectly, any voter regardation drave?  (3) Provide a grant to an individual for travel, study, or other similar purposes?  (4) Provide a grant to an individual for travel, study, or other similar purposes?  (5) Provide a grant to an individual for travel, study, or other similar purposes?  (6) Provide a grant to an individual for travel, study, or other similar purposes?  (7) Provide for any surpose other than religious, charitable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (8) Provide for any surpose other than religious, charitable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (9) Provide for any unswer is 'Yes' to 54(1)-(5), did any of the transactions field to qualify under the exceptions described in Regulations section 33.495 or in a current notice regarding disaster assistance directly and section sections of the exceptions described in Regulations section 33.495 or in a current notice regarding disaster assistance directly and the section of the exceptions described in Regulations section 53.495 5(i) Organization regulation and complete transactions and personal benefit contract?  (8) An animal provided in the section of the provided transaction of the purpose of the section of the provided transaction of the purpose of		•				
on, directly or infriencity, any voter registration drive?  (3) Provide a grant to a midwals for travel, study, or other similar purposes?  (4) Provide a grant to a modification of the than a charitable, etc., organization described in section 59(a)(1), (2), or 3, or section 490(d)(2)? (see instructions)  (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelity to inflict on a namials?  (6) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelity to inflict on a namials?  (7) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelity to inflict on a namials?  (8) If any answer is 'Yes' to 5a(1)-(3), did any of the transactions fail to quality under the exceptions observed in the control of cruelity to inflict on a namials?  (9) If any answer is 'Yes' to 5a(1)-(3), did any of the transaction fail to quality under the exceptions observed in the control of cruelity of the grant?  (1) If the answer is 'Yes' to 5a(1)-(3), did any of the transaction of the cruelity of the grant?  (1) If the answer is 'Yes' to 5a(1)-(3), did any of the transaction of the cruelity of the grant?  (2) It is all officers, direction, furtiles, foundation a party to a prohibited tax sheller transaction?  (3) Name and address of the foundation of the same arrows any proceeds or have any net income stributable to the transaction?  (4) Name and address of the highest-paid amployees (other than those included on line 1—see instructions, if (4) Compensation (5) Compensation (5) Compensation (5) Compensation (6) Compensation (6) Compensation (7) Compens	(1) Carry on propaganda, or otherwise attempt	ot to influence legislation	n (section 4945(e))?	Yes	X No	
(c) Provide a grent to an organization other than a charitable, etc. organization described in section 509(a)(1), (2), or (3), or section 494(b)(2)? (see instructions)  (d) Provide for any purpose other than religious, charitable, scentific, literary, or educational purposes, or for the prevention of cruelly to children or animals?  (e) Provide for any purpose other than religious, charitable, scentific, literary, or educational purposes, or for the prevention of cruelly to children or animals?  (e) If any answers is "Yes" to Su-10, 50, dual any of the transactions fall to qualify under the exceptions described in Regulations section 53.4495 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  (e) If the answer is "Yes" to substitute the stemant required by Regulations section 53.4495-5(d)  For the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract required by Regulations section 53.4495-5(d)  For the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract required by Regulations section 53.4495-5(d)  For the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract required by Regulations section 53.4495-5(d)  For the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract.  If "Yes" to 6b, the Form 8870  7a At any time during the year, pay premiums, directly or indirectly, on a personal benefit contract.  If "Yes I No  The N/A  Fast 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 instructions). If none, enter violation and particular and the particular and the particular and the form paid of the paid of the particular and the particular and the particular and the	(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	4955); or to carry	Yes [	X No	
in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see mstructions)  (S) Provide for any purposes other than religious, charatable, secentific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (b) If any answer is "Yes" to Sa(1)-(5), dut any of the transactions fail to qualify under the exceptions described in Requisitions section 53.4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  If the answer is "Yes" to question 54(3), does the foundation clam any emption from the tax because it maintained expenditur responsibility for the grant 54(a) and the statement required by Regulations section 53.4945-54(a)  6a Did the foundation charaction by respirations assistance check here  If "Yes," attach the statement required by Regulations section 53.4945-54(a)  6b Did the foundation of year, experiments, directly or indirectly, to pay premiums on a personal benefit contract?  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?  Pair VIII Information About Officors, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, directors, trustless foundation managers and their compensation (d) Compensation  (a) Name and address  (b) Title and average (d) Compensation  (c) Compensation  (d) Contributions to employee by Expense account, other allowances plans and deferred compensation  (e) Expense account, Other allowances of each employee spad more than \$50,000  (e) Expense account, Other allowances of expensation of the North State of the position of the paid, eriter 4).  (e) Compensation  (f) Contributions to expension of the provided of the provided of the position of the paid of th	(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes [	X No	
educational purposes, or for the prevention of cruelly to children or animals?  b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fall to qualify under the exceptions (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  of the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tox because it maintained expenditure responsibility for the grant?  If "Yes," attach the statement required by Regulations section 53 4945-5(d)  Sa Did the foundation, during the year, reserved any funds, directly or indirectly, on a personal benefit contract?  If "Yes" to 6b, file Form 8870  The All any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  The animation About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  List all officers, directors, trustees, foundation (final paid, writer 4)  (a) Name and address  Compensation of five highest-paid employees (other than those included on line 1—see Instructions). (b) Title and average devoted to position (c) Compensation (c) Compensation (c) Compensation (c) Compensation (c) C) C) Compensation (c) C) C) Compensation (c) C) C) Compensation (c) C) C) C) Compensation (c) C) C) Compensation (c) C) Compensation (c) C)	(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, or 4940(d)(2)? (see instru	ganization described ctions) .	Yes [	X No	
described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  If the answer is Yes to question 54(6), 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)  6a Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  If Yes to 80, the Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes to 80, the Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes to 80, the Form 8870  7b If Yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Pald Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title and average hours per week devoted to position  2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter NONE:  (c) Compensation  (d) Compensation  (d) Contributions to employee paid more than \$50,000  11 the and average of the foundation are all the party of the party week devoted to position  (e) Expense account, other allowances of each employee paid more than \$50,000  (f) Title and average of the foundation to employee paid more than \$50,000  (o) Compensation  (f) Compensation  (g) Compensation	(5) Provide for any purpose other than religio educational purposes, or for the preventio	us, charitable, scientific n of cruelty to children	, literary, or or animals?	Yes [	X No	
Crganizations 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?  If Yes, 'attach the statement required by Regulations section 53 449-5x(d)  6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  b) Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If Yes is to 0, the Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  The information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title and average hours per week devoted to position for the paid, errier -0-) find paid, errier -0-) find paid, errier -0-) find paid, errier -0-) find paid effort ormination.  2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter NONE.'  (a) Name and address of each employee paid more than \$50,000 paid and effort or paid and effort ormination.  (b) Title and average hours per week devoted to position (c) Compensation (d) Contributions to employee benefit plans and deferred compensation of the allowances of employee benefit plans and effort or employee to the employee and	described in Regulations section 53.4945 or in	he transactions fail to q a current notice regard	ualify under the excepti ling disaster assistance	ons		56 N/A
tax because it maintained expenditure responsibility for the grant?  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?  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  bif yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  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 instructions).  (a) Name and address  (b) Title and everage devoted to position  (c) Compensation of five Nighest-paid employees (other than those included on line 1— see instructions). If none, enter NONE:  (a) Name and address (b) Title and everage hours per view, devoted to position  (b) Title and everage hours per view, devoted to position  (c) Compensation of five Nighest-paid employees (other than those included on line 1— see instructions). If none, enter NONE:  (c) Compensation of five Righest-paid employees (other than those included on line 1— see instructions). If none, enter NONE:  (d) Compensation of five Righest-paid employees (other than those included on line 1— see instructions). If none, enter NONE:  (e) Expense account, other allowances devoted to position  (f) Title and everage hours per view, devoted to position of the compensation of the railowances of the rai	,	rding disaster assistanc	e check here	►[		
5a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  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?  1 List all officers, Directors, Trustees, Foundation Managers, Highly Pald Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title and average hours per week devoted to position  2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter NONE:  (a) Name and address of each employee hours per week devoted to position  2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter NONE:  (a) Name and address of each employee hours per week devoted to position  (b) Title and average hours per week devoted to position  (c) Compensation  (d) Contributions to employee hours per week devoted to position  (d) Contributions to employee hours per week devoted to position  (e) Compensation  (f) Compensation  (o) Compensation  (o) Compensation  (o) Compensation  (o) Expense account, other allowances  (o) Compensation	tax because it maintained expenditure respons	sibility for the grant?		. N/A Yes [	No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?.  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?.  7b If 'Yes' to 6b, file Form 8370  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?.  7b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?.  7c Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (c) Compensation  (a) Name and address  (b) Title and average devoted to position  (c) Compensation  (d) Combitutions to other allowances of the railowances of the r	<b>6a</b> Did the foundation, during the year, receive ar	ny funds, directly or indi	rectly, to pay premiums	∏Yes	X No	
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	·		tly, on a personal benef			<u>бь х</u>
bit yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  7b N/A Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Pald Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title and average hours per week devoted to position  SEE STATEMENT 9  14,000.  (c) Compensation (finot pald, enter -0-)  14,000.  (d) Contributions to employee benefit plans and deferred compensation  (e) Expense account, other allowances plans and deferred compensation  14,000.  (d) Contributions to employee benefit plans and deferred compensation  (e) Title and average hours per week devoted to position  (finot pald, enter -0-)  (g) Expense account, other allowances plans and deferred compensation  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week hours per week devoted to position to the ransaction per devoted to position per devoted	If 'Yes' to 6b, file Form 8870				_	
The state of the s						
1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title and average hours per week devoted to position of mot paid, enter 4-)  (c) Compensation of mot paid, enter 4-)  (d) Contributions to employee benefit plans and deferred compensation  (d) Expense account, other allowances  14,000.  0.  0.  0.  14,000.  14,000.  (d) Contributions to employee benefit plans and deferred compensation  (d) Expense account, other allowances  (e) Expense account, other allowances  (f) Compensation  (g) Expense account, other allowances  (h) Expense account, other allowances  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position  (h) Title and average hours per week devoted to position						
1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address  (b) Title and average hours per week devoted to position  (c) Compensation  (find paid, enter -D.)  (d) Contributions to employee benefit plans and deferred compensation  (e) Expense account, other allowances  (find paid, enter -D.)  (find paid, enter -D.)  (in operation)  (in operatio	and Contractors	rectors, i rustees	, roundation Mana	igers, riigniy Pai	a Employ	yees,
(a) Name and address (b) Title and average house per week devoted to position  (c) Compensation (first paid, enter -0-) (d) Compensation (other allowances)  (e) Compensation (other allowances)  (first paid, enter -0-) (fir		n managers and their co	empensation (see instru	ctions).		
2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE.'  (a) Name and address of each employee hours per week devoted to position  (b) Title and average hours per week devoted to position  (c) Compensation  (d) Contributions to employee benefit plans and deferred compensation  (ob) Expense account, other allowances  other allowances		<b>(b)</b> Title and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	other	
2 Compensation of five highest-paid employees (other than those included on line 1— see 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  other allowances	SEE STATEMENT 9					
(a) Name and address of each employee paid more than \$50,000  NONE  (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			14,000.	0	, .	0
(a) Name and address of each employee paid more than \$50,000  NONE  (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						
(a) Name and address of each employee paid more than \$50,000  NONE  (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						
(a) Name and address of each employee paid more than \$50,000  NONE  (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						
(a) Name and address of each employee paid more than \$50,000  NONE  (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	2 Compensation of five highest-paid employees	(other than those incl	ıded on line 1— see inst	ructions). If none, en	ter 'NONE.'	
NONE	(a) Name and address of each employee	(b) Title and average hours per week		(d) Contributions to employee benefit plans and deferred	(e) Expe	ense account
Total number of other employees paid over \$50,000	NONE			compensation		
Total number of other employees paid over \$50,000						
Total number of other employees paid over \$50,000   □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □						
Total number of other employees paid over \$50,000						
Total number of other employees paid over \$50,000						
Total number of other employees paid over \$50,000				-		
	Total number of other employees paid over \$50,000				<b>&gt;</b>	(

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Part VIII Information About Officers, Directors, Trustees, Fou and Contractors (continued)	ndation Managers, Highly Paid	Employees,
3 Five highest-paid independent contractors for professional services — (see enter 'NONE.'	instructions). If none,	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	i	
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 statistica organizations and other beneficiaries served, conferences convened, research papers produced, etc.	al information such as the number of	Expenses
1 N/A		·
2		·
3		
4		
Part IX-B Summary of Program-Related Investments (see instru	uctions)	
Describe the two largest program-related investments made by the foundation dur	ing the tax year on lines 1 and 2.	Amount
1 <u>N/A</u>		
2		
<b>4</b>		
All other program-related investments. See instructions.		
3	·- <b></b> -	
Total. Add lines 1 through 3		0.
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BAA

Form **990-PF** (2009)

Part X Minimum Investment Return (All domestic foundations must complete see instructions.)	this part. Forei	gn foundations,
1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purp a Average monthly fair market value of securities	ooses:	3,175,299.
<b>b</b> Average of monthly cash balances	1b	
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	
Reduction claimed for blockage or other factors reported on lines 1a and 1c		5,000,015.
(attach detailed explanation)	0.	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d		3,660,019.
	··· · ·	3,000,013.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	54,900.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line	4 <u>5</u>	3,605,119.
6 Minimum investment return. Enter 5% of line 5	6	180,256.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) and certain foreign organizations check here ► ☐ and do not compared to the co	orivate operating plete this part.)	foundations
1 Minimum investment return from Part X, line 6	1	180,256.
2a Tax on investment income for 2009 from Part VI, line 5	900.	
<b>b</b> Income tax for 2009. (This does not include the tax from Part VI.)		
c Add lines 2a and 2b.	2c	900.
3 Distributable amount before adjustments. Subtract line 2c from line 1	. 3	179,356.
Recoveries of amounts treated as qualifying distributions	4	27070001
5 Add lines 3 and 4	5	179,356.
6 Deduction from distributable amount (see instructions)	. 6	2.0,000.
7 <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	179,356.
		177,550.
Part XII Qualifying Distributions (see instructions)		<b>,</b>
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	171,987.
<b>b</b> Program-related investments — total from Part IX-B	1b	1,1,50,.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, pur		
	puses	
<ul> <li>3 Amounts set aside for specific charitable projects that satisfy the:</li> <li>a Suitability test (prior IRS approval required)</li></ul>	. За	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	·
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII	, line 4 <b>4</b>	171,987.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment inco Enter 1% of Part I, line 27b (see instructions)	me. <b>5</b>	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	<u>6</u>	171,987.
		<del></del>
<b>Note:</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when call qualifies for the section 4940(e) reduction of tax in those years.	culating whether the	ioundation

### Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
1 Distributable amount for 2009 from Part XI, line 7				179,356.
2 Undistributed income, if any, as of the end of 2009:				179,330.
a Enter amount for 2008 only			3,102.	
<b>b</b> Total for prior years: 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004			;	
<b>b</b> From 2005				
<b>c</b> From 2006				
<b>d</b> From 2007				
• From 2008 .				
f Total of lines 3a through e	0.			***************************************
4 Qualifying distributions for 2009 from Part			•	
XII, line 4: ► \$ 171, 987.				
a Applied to 2008, but not more than line 2a			3,102.	
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				168,885.
Remaining amount distributed out of corpus	0.		***************************************	
5 Excess distributions carryover applied to 2009	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a) )				
same amount must be snown in column (a) )				
6 Enter the net total of each column as			1	
indicated below:				,
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency		-		
ed income for which a notice of deficiency has been issued, or on which the section				
4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable				
amount – see instructions		0.		
Undistributed income for 2008. Subtract line 4a from				
line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be				10 471
distributed in 2010				10,471.
corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
, ,	0.		•••••	
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			***************************************
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.	-		
10 Analysis of line 9:	-			
a Excess from 2005			1	
<b>b</b> Excess from 2006				
c Excess from 2007		1	1	
d Excess from 2008			1	
• Excess from 2009				

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Part XIV Private Operating Foundation					<u> N/A</u>
1a If the foundation has received a ruling or de is effective for 2009, enter the date of the ru	termination letter	·	perating foundation		
<b>b</b> Check box to indicate whether the foundation	•			4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum investment return from Part X for each year listed	<b>(a)</b> 2009	<b>(b)</b> 2008	<b>(c)</b> 2007	<b>(d)</b> 2006	(e) Total
<b>b</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					
Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
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 ( assets at any time during the	Complete this	part only if the	organization h	ad \$5,000 or mo	re in
Information Regarding Foundation Manager     a List any managers of the foundation who had close of any tax year (but only if they have to NONE	<b>s</b> :		otal contributions rec section 507(d)(2).)	ceived by the foundat	on before the
<b>b</b> List any managers of the foundation who ow a partnership or other entity) of which the fo NONE	n 10% or more of undation has a 10	the stock of a corpo % or greater interes	oration (or an equal st.	y large portion of the	ownership of
2 Information Regarding Contribution, Grant,	Gift, Loan, Schola	rship, etc, Program	ns:	· · · · · · · · · · · · · · · · · · ·	
Check here In the foundation only ma requests for funds. If the foundation makes complete items 2a, b, c, and d.	kes contributions	to preselected char	itable organizations	and does not accept nizations under other	unsolicited conditions,
a The name, address, and telephone number	of the person to w	nom applications st	nould be addressed:		
SEE STATEMENT 10		<u> </u>			
<b>b</b> The form in which applications should be sul	omitted and inform	nation and materials	s they should include	<b>e:</b>	
SEE STATEMENT FOR LINE 2A	<del></del>	<u> </u>			
c Any submission deadlines:					
SEE STATEMENT FOR LINE 2A	. L				
<b>d</b> Any restrictions or limitations on awards, suc	on as by geograph	iical areas, charitab	ie fields, kinds of in:	stitutions, or other fac	ctors:
SEE STATEMENT FOR LINE 2A					

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Form **990-PF** (2009)

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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		Amount			
Name and address (home or business)	substantial contributor	recipient	00.10.750.10.1				
Name and address (home or business)  a Paid during the year  SEE STATEMENT 11	any roundation manager or substantial contributor	recipient	contribution	Amount			
Total			► 3a	120,000.			
<b>b</b> Approved for future payment							
Total			► 3h				

### Part XVI-A Analysis of Income-Producing Activities

Form 990-PF (2009)

Enter gross amounts unless otherwise indicated.	Unrelate	Unrelated business income		section 512, 513, or 514	
1 Program service revenue:	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions)
a	<del> </del>	<del></del>	<del></del>	<del></del>	<u> </u>
b	-	-	<del>  </del>		
d		<del></del>	<del>                                     </del>	-	
•					
f					
g Fees and contracts from government agencies.					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments		<u> </u>	14	2,423.	
4 Dividends and interest from securities			14	72,515.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
<b>b</b> Not debt-financed property			ļ		
6 Net rental income or (loss) from personal property .					
7 Other investment income	·		<del>                                     </del>		
<b>8</b> Gain or (loss) from sales of assets other than inventory	<del> </del>	<del></del>	18	-27,285.	-4,974.
9 Net income or (loss) from special events	<del></del>				-· · · · · · · · · · · · · · · · · · ·
10 Gross profit or (loss) from sales of inventory		· · · · · · · · · · · · · · · · · · ·	-		·
11 Other revenue:			-		<u></u>
a	<del>                                     </del>				
<b>b</b>					<del></del>
C			+-+		<del></del>
<u> </u>	+		<del> </del>		<del></del>
12 Subtotal. Add columns (b), (d), and (e).			-	47,653.	-4,974.
13 <b>Total.</b> Add line 12, columns (b), (d), and (e)				. 13	42,679.
See worksheet in the instructions for line 13 to verify co			•		12,013.

## 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 the instructions)
N/A	
<del></del>	

BAA

Form **990-PF** (2009)

#### THE BRAITMAYER FOUNDATION Form 990-PF (2009) 04-6112131 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** No Yes 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: 1a(1) (2) Other assets 1 a (2) Х **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization.... 16(1) (2) Purchases of assets from a noncharitable exempt organization 16(2) (3) Rental of facilities, equipment, or other assets X 1b(3) (4) Reimbursement arrangements 1b(4) X (5) Loans or loan guarantees 16(5) **(6)** Performance of services or membership or fundraising solicitations . 1b(6) X c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 1 c 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

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	descri	foundation dire bed in section s,' complete the	501(c) of	the Code	(other t	with, or re han secti	elated to, on 501(c)	one or mo (3)) or in s	re tax-e ection :	exem <sub> </sub> 527?	pt organız	ations			]Yes [	ΧNο
_		(a) Name of or	ganızatıo	n		<b>(b)</b> ⊺	ype of or	ganization		(c) Description of relationship						
N	/A				_			_		<u> </u>						
										<u> </u>						
_										<u> </u>						
_										<u> </u>						_
_	Under penal	ites of perjury, I decl	are that I hav	e examined thi	ıs retum, ıı or fiducian	ncluding acco	ompanying so	chedules and st ation of which	atements, preparer	and to has an	the best of my	knowledge	and belie	f, it is true, co	rrect, and	
s	<b>.</b>	Ein a.	Bra	Lua	ν.	TTE			ં   4	112	12010					
i G N	Signa	ture of officer or tru	ıstee _		0				Date	•	•	Title		_		
H Paid	Paid Pre-	Preparer's signature	parer's hature			Date	181	boro	Check if self-	a ► 🗍	Preparer's I (See Signat N/A	dentifying n ture in the ir	umber nstrs)			
Ê	parer's	Firm's name (or	BENOI	Z & MC	ARDLE	, P.C	•			1		EIN •	N/2	Ā		•
	Use Only	yours if self- employed), address, and ZIP code	240 W	ARENAM N. MA		O BO 3-0019	X 1037					Phone n	. •	(508)	748-16	51 1
B/	AA	Ar Code		<del>Vi.</del>			-				-	I rhone h			m <b>990-P</b> l	

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### **FEDERAL STATEMENTS**

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# THE BRAITMAYER FOUNDATION C/O AMERICAN RESEARCH & MANAGEMENT

04-6112131

<b>STATEMENT 1</b>			
<b>FORM 990-PF,</b>		I, LINE	16B
ACCOUNTING	FEES	-	

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BENOIT & MCARDLE .	TOTAL	\$ 2,950. \$ 2,950.	\$ 2,950. \$ 2,950.	<u>\$ 0.</u>	\$ 0.

#### STATEMENT 2 FORM 990-PF, PART I, LINE 16C OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AMERICAN RESEARCH & MANAGEMENT SABINA TAJ TOTAL	\$ 25,256. 37,917. \$ 63,173.	\$ 25,256. \$ 25,256.	<u>\$ 0.</u>	\$ 37,917. \$ 37,917.

#### STATEMENT 3 FORM 990-PF, PART I, LINE 18 TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMMONWEALTH OF MASSACHUSETTS FOREIGN TAXES	\$ 70. 1,740. \$ 1,810.	\$ 1,740. \$ 1,740.	<u>\$ 0.</u>	\$ 70. \$ 70.

#### STATEMENT 4 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE <u>PURPOSES</u>
OFFICE EXPENSE	TOTAL $\frac{\$}{\$}$ $\frac{44}{44}$ .	\$ 0.	\$ 0.	<u>\$ 0.</u>

## FEDERAL STATEMENTS

# THE BRAITMAYER FOUNDATION C/O AMERICAN RESEARCH & MANAGEMENT

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STATEMENT 5 FORM 990-PF, PART II, LINE 10A INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS

U.S. GOVERNMENT OBLIGATIONS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
US TREASURY 2.625% 03/15/09 US TREASURY 2.625% 3/15/09 US TREASURY 4.875% 6/30/09 US TREASURY 3.5% 11/15/09 US TREASURY NOTE 4.75% DUE 2/15/10 US TREASURY NOTE 4% DUE 3/15/10 FEDERAL HOME LOAN BANK 4.875% DUE 2011	COST COST COST COST COST COST COST	\$ 0. 0. 0. 0. 150,817. 151,092. 216,452. \$ 518,361.	0. 0. 0. 150,785. 151,131. 213,626.
	TOTAL	\$ 518,361.	\$ 515,542.

#### STATEMENT 6 FORM 990-PF, PART II, LINE 10B INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE		MARKET ALUE
BANK OF AMERICA	COST	\$ 0.	\$	0.
ANALOG DEVICES	COST	13,148.		78,950.
DOVER CORP.	COST	27,831.		95,703.
EXXON MOBIL CORPORATION	COST	20,663.		136,380.
GENERAL ELECTRIC	COST	44,319.		75,650.
JOHNSON & JOHNSON	COST	15,674.		96,615.
MERCK	COST	29,048.		73,080.
PROCTER & GAMBLE	COST	18,823.		90,945.
PEPSICO PEPSICO	COST	79,189.		106,400.
STATE STREET	COST	52,718.		43,540.
MICROSOFT	COST	63,406.		60,960.
AUTOMATIC DATA PROCESSING	COST	57,267.		72,794.
ENCANA	COST	19,416.		84,214.
PLUM CREEK TIMBER	COST	44,035.		71,744.
MCGRAW-HILL	COST	0.		· 0.
CHURCH & DWIGHT	COST	50,322.		90,675.
TRANS CANADA	COST	53,699.		85,925.
NOVARTIS AG ADR	COST	66,865.		81,645.
ILLINOIS TOOL WORKS	COST	64,260.		71,985.
WATERS CORPORATION	COST	37,533.		61,960.
ADOBE SYSTEMS	COST	43,747.		62,526.
CHEVRON TEXACO	COST	63,246.		76,990.
WILEY JOHN	COST	52,134.		62,820.
SYSCO	COST	47,548.		41,910.
OCCIDENTAL PETE	COST	22,390.		40,675.
GLACIER BANCORP	COST	43,873.		30,184.
EXPEDITORS INTERNATIONAL	COST	75,691.		69,540.
PRIVATEBANCORP	COST	1,512.		448.
ALTRIA GROUP	COST	51,558.		63,797.
FORTUNE BRANDS	COST	76,961.		86,400.
J G BOSWELL	COST	45,079.		37,800.
STRYKER CORP	COST	54,890.		67,999.
US BANCORP	COST	, O.		0.
WELLS FARGO	COST	37,920.		33,737.
				-

# FEDERAL STATEMENTS

THE BRAITMAYER FOUNDATION C/O AMERICAN RESEARCH & MANAGEMENT

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#### STATEMENT 6 (CONTINUED) FORM 990-PF, PART II, LINE 10B INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CENOVUS ENERGY CME GROUP GOLDMAN SACHS JP MORGAN CHASE CAP X PHILIP MORRIS INTERNATIONAL POTASH CORP OF SASKATCHEWAN UBS CAPITAL VII	COST S COST COST COST COST COST COST COST TOTAL S	18,285. 58,898. 69,728. 50,492. 37,113. 28,906. 62,770. 5 1,700,957.	\$ 65,520. 67,192. 75,720. 50,900. 48,190. 32,550. 69,450. \$ 2,563,513.

#### STATEMENT 7 FORM 990-PF, PART II, LINE 10C INVESTMENTS - CORPORATE BONDS

CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
GENERAL ELECTRIC 3.25% 6/15/09 PHILLIPS PETROLEUM 8.75% 5/25/10 PHILIPS PETROLEUM 8.75% DUE 5/25/10 HERSHEY CO. 5.30% DUE 9/1/11	COST	\$ 0.	\$ 0.
	COST	0.	0.
	COST	101,963.	103,332.
	COST	107,916.	105,935.
	TOTAL	\$ 209,879.	\$ 209,267.

# STATEMENT 8 FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

								1
					(B)	HOW	(C) DATE	(D) DATE
ITEM		(A) DE:	<u>SCRIPTION</u>		ACO	UIRED	ACQUIRED	SOLD
1	1500 SHS	BANK OF AME	RICA		PURC	CHASED	1/05/1999	8/28/2009
2	200 SHS C	HURCH & DWI	GHT		PURC	CHASED	12/06/2004	8/28/2009
3	200 SHS E	NCANA			PURC	CHASED	7/16/2002	8/28/2009
4	300 SHS J	OHNSON & JO	HNSON		PURC	CHASED	7/23/1993	8/28/2009
5	1800 SHS	MCGRAW-HILL			PURC	CHASED	VARIOUS	2/09/2009
6	200 SHS P	ROCTER & GAI	MBLE		PURC	CHASED	8/28/2009	
7	1250 SHS	PRIVATEBANC	ORP		PURC	CHASED	11/06/2009	
8		RIVATEBANCO	RP		PURC	CHASED	12/18/2008	11/06/2009
9	250 SHS S'			PURC	CHASED	2/09/2001	8/28/2009	
10		ITS U.S. TRI	EASURY NOT	E	PURC	CHASED	12/15/2004	3/16/2009
11	2000 SHS US BANCORP				PURC	CHASED	VARIOUS	8/28/2009
12	750 SHS U	S BANCORP			PURC	CHASED	12/18/2008	8/28/2009
13	200 SHS E			PURC	PURCHASED 6/2		8/28/2009	
14	CAPITAL G	AIN DISTRIB	UTION		PURC	CHASED	VARIOUS	12/31/2009
	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)
	GROSS	DEPREC	ሮስፍሞ	CATN	EM7		AC EYCECC	CATN

	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)
	GROSS	DEPREC.	COST	GAIN	FMV	ADJ. BAS.	EXCESS	GAIN
ITEM	SALES	ALLOWED	BASIS	(LOSS)	12/31/69	12/31/69	(I) - (J)	(LOSS)
1	26,966.		48,616.	-21,650.				\$ -21,650.
2	11,361.		6,296.	5,065.				5,065.
3	10,610.		2,861.	7,749.				7,749.
4	18,045.		2,891.	15,154.				15,154.
	•		•	•				,

## **FEDERAL STATEMENTS**

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STATEMENT 8 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

	(E) GROSS	(F) DEPREC.	(G) COST	(H) GAIN	(I) F <b>MV</b>	(J) ADJ. BAS.	(K) EXCESS	(L) GAIN
ITEM	SALES	ALLOWED	BASIS	(LOSS)	12/31/69	12/31/69	(I) - (J)	(LOSS)
5	45,166.		52,840.	-7,674.				\$ -7,674.
6	10,588.		2,440.	8,148.				8,148.
7	12,088.		40,174.	-28,086.				-28,086.
8	4,352.		13,605.	-9,253.				-9,253.
9	13,277.		13,621.	-344.				-344.
10	100,000.		97,300.	2,700.				2,700.
11	44,531.		63,022.	-18,491.				-18,491.
12	16,705.		18,815.	-2,110.				-2,110.
13	13,973.		632.	13,341.				13,341.
14	3,192.		0.	3,192.				3,192.
							TOTAL	\$ -32,259.

# STATEMENT 9 FORM 990-PF, PART VIII, LINE 1 LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTE			ACCOUNT/
ANNE B. WEBB 91-A ALLEN'S POINT MARION, MA 02738	TRUSTEE 0	\$ 2,000.	\$ 0.	\$ 0.
ERIC A. BRAITMAYER 2 LEEWARD WAY FAIRHAVEN, MA 02719	TRUSTEE 0	2,000.	0.	0.
NANCY W. CORKERY 132 WESTFIELD STREET DEDHAM, MA 02026	TRUSTEE 0	2,000.	0.	0.
R. DAVIS WEBB, JR. PHD 341 ORION ROAD N.E. NORTH CANTON, OH 44720	TRUSTEE 0	2,000.	0.	0.
JOHN W. BRAITMAYER 520 POINT ROAD MARION, MA 02738	TRUSTEE 0	2,000.	0.	0.
KAREN L. BRAITMAYER 4022 29TH AVE W. SEATTLE, WA 98199	TRUSTEE 0	2,000.	0.	0.
KRISTINA B. HEWEY 174 CRAIGIE STREET PORTLAND, ME 04102	TRUSTEE 0	2,000.	0.	0.
	TOT	L \$ 14,000.	\$ 0.	<u>\$ 0.</u>

## FEDERAL STATEMENTS

THE BRAITMAYER FOUNDATION C/O AMERICAN RESEARCH & MANAGEMENT

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## **STATEMENT 10** FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

SABINA TAJ

10205 SAVOY CT

CARE OF: STREET ADDRESS: CITY, STATE, ZIP CODE:

ELLICOTT CITY, MD 21042

TELEPHONE:

FORM AND CONTENT:

BRIEF HISTORY OF THE ORGANIZATION DESCRIPTION OF THE PROJECT (NOT MORE THAN 3 PAGES) BUDGET AND TIME FRAME, SUPPLY PROOF OF TAX EXEMPT STATUS, LIST OF BOARD OF

DIRECTORS, LATEST AUDITED FINANCIAL STATEMENTS

SUBMISSION DEADLINES:

NONE

RESTRICTIONS ON AWARDS: NONE

# STATEMENT 11 FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
PORTLAND TRAILS	NONE	PRVT	UNRESTRICTED	\$ 10,000.
BARD COLLEGE	NONE	PRVT	TO SUPPORT THE INITIATIVE PER PROPOSAL	35,000.
BAOTO YETU	NONE	PRVT	UNRESTRICTED	10,000.
CASES	NONE	PRVT	UNRESTRICTED	10,000.
GEORGE W KIMBALL ELEMENTARY SCHOOL	NONE	PRVT	UNRESTRICTED	10,000.
UNITED TEEN EQUALITY CENTER	NONE	PRVT	UNRESTRICTED	35,000.
V.A.S.E 16 SPRING STREET MARION, MA 02738	NONE	PRVT	TO SUPPORT THE READING IS FUNDAMENTAL PROGRAM AND PERFORMING ARTS	3,000.
ST. LAWRENCE UNIVERSITY	NONE	PRVT	TO SUPPORT INITIATIVE IN ACCORDANCE WITH YOUR PROPOSAL.	1,000.

# FEDERAL STATEMENTS THE REALTMAYER FOUNDATION

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THE BRAITMAYER FOUNDATION C/O AMERICAN RESEARCH & MANAGEMENT

#### STATEMENT 11 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
CANTON COUNTRY DAY SCHOOL RDW	NONE	PRVT	UNRESTRICTED	\$ 1,000.
MAINE AUDUBON	NONE	PRVT	TO SUPPORT INITIATIVE IN ACCORDANCE WITH YOUR PROPOSAL.	1,000.
NEW BEDFORD WHALING MUSEUM 18 JOHNNY CAKE HILL NEW BEDFORD, MA 02740	NONE	PRVT	UNRESTRICTED	1,000.
COMMUNITY FOUNDATION OF SE MA	NONE	PRVT	UNRESTRICTED	1,000.
LLOYD CENTER FOR THE ENVIRONMENT	NONE	PRVT	UNRESTRICTED	1,000.
MORNINGSTAR ACADEMY	NONE	PRVT	UNRESTRICTED	1,000.
			TOTAL	\$ 120,000.

## FEDERAL SUPPLEMENTAL INFORMATION

THE BRAITMAYER FOUNDATION C/O AMERICAN RESEARCH & MANAGEMENT

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ELECTION UNDER IRC 171(C) TO AMORTIZE THE FOLLOWING BOND PREMIUMS

GENERAL ELECTRIC CORPORATE BOND INTEREST RATE 3.25% MATURITY PERIOD 6/15/2009

PURCHASE PRICE \$100,745 FACE VALUE \$100,000

PHILIP PETROLEUM CORPORATE BOND INTEREST RATE 8.75% MATURITY PERIOD 5/25/2010

PURCHASE PRICE \$109,668 FACE VALUE \$100,000