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

2009

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

For calendar year 2009, or tax year beginning , and ending

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE BUNKY FUND		A Employer identification number 04-6926501
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number 617-542-8155
	City or town, state, and ZIP code BOSTON, MA 02110		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 270,065. (Part I, column (d) must be on cash basis)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		4,601.	4,601.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		3,417.			
b Gross sales price for all assets on line 6a 18,169.					
7 Capital gain net income (from Part IV, line 2)			3,417.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		8,018.	8,018.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		1,500.	1,500.		0.
c Other professional fees STMT 3		1,546.	1,546.		0.
17 Interest					
18 Taxes STMT 4		38.	38.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		35.	35.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		3,119.	3,119.		0.
25 Contributions, gifts, grants paid		17,500.			17,500.
26 Total expenses and disbursements. Add lines 24 and 25		20,619.	3,119.		17,500.
27 Subtract line 26 from line 12		-12,601.			
a Excess of revenue over expenses and disbursements			4,899.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	36,194.	23,923.	23,923.
	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			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 6	203,259.	202,929.	246,142.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	239,453.	226,852.	270,065.	
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			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	222,628.	222,628.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	16,825.	4,224.	
30 Total net assets or fund balances	239,453.	226,852.		
31 Total liabilities and net assets/fund balances	239,453.	226,852.		

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	239,453.
2 Enter amount from Part I, line 27a	2	-12,601.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	226,852.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	226,852.

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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 SCHEDULES			P	VARIOUS	VARIOUS
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a 18,169.		14,752.	3,417.		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a			3,417.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	3,417.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8			3	N/A	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	20,474.	301,454.	.067917
2007	11,220.	347,264.	.032310
2006	19,185.	328,431.	.058414
2005	6,035.	315,052.	.019156
2004	19,988.	309,924.	.064493

2 Total of line 1, column (d)	2	.242290
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	.048458
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	224,475.
5 Multiply line 4 by line 3	5	10,878.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	49.
7 Add lines 5 and 6	7	10,927.
8 Enter qualifying distributions from Part XII, line 4 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	8	17,500.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b.	1	49.
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	49.
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	49.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	206.
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	206.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	157.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 157. Refunded <input checked="" type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► <u>BARNEKE AND ANDERSON, LLP</u> Telephone no ► <u>617-542-8155</u> Located at ► <u>C/O BARNEKE AND ANDERSON LLP, 211 CONGRESS ST, BO</u> ZIP+4 ► <u>02110</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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
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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

N/A

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?

If "Yes" to 6b, file Form 8870

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STEPHANIE L. BRODY	TRUSTEE			
249 THOMAS AVE. SO.				
MINNEAPOLIS, MN 55405	1.00	0.	0.	0.
SHERRY LEWIS	TRUSTEE			
958 REINDEER DRIVE				
FAIRBANKS, AK 99709	1.00	0.	0.	0.
MARK HANLEY PAINE LEWIS	TRUSTEE			
1967 ANDREW COURT				
CHANHASSEN, MN 55317	1.00	0.	0.	0.
LARK BUFORD LEWIS	TRUSTEE			
17002 THE STRAND				
MINNETONKA, MN 55345	1.00	0.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	201,121.
b	Average of monthly cash balances	1b	26,772.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	227,893.
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	227,893.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,418.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	224,475.
6	Minimum investment return. Enter 5% of line 5	6	11,224.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6	1	11,224.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	49.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	49.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	11,175.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	11,175.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	11,175.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	17,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	17,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	49.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	17,451.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				11,175.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			10,506.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 17,500.				
a Applied to 2008, but not more than line 2a			10,506.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				6,994.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				4,181.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	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				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

- 1 a** 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)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

[illegible]

Part XV **Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**

1 Information Regarding Foundation Managers:

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

SEE STATEMENT 7

- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

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

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

- a The name, address, and telephone number of the person to whom applications should be addressed**

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

- c Any submission deadlines:**

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

Part XV	Supplementary Information (continued)
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3 Grants and Contributions Paid During the Year or Approved for Future Payment[illegible]

Part XVII

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

<p>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?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p>		Yes	No
	1a(1)		X
	1a(2)		X
	1b(1)		X
	1b(2)		X
	1b(3)		X
	1b(4)		X
	1b(5)		X
	1b(6)		X
	1c		X

[illegible]

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

☐ Yes ☒ No

b If "Yes," complete the following schedule

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

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

Sign Here

Signature of officer or trustee

Date _____

Title

Preparer's
signature

Firm's name (or yours
if self-employed),
address, and ZIP code

BARNEKE AND ANDERSON, LLP
211 CONGRESS STREET
BOSTON, MA 02110-2432

Date

11/3/2020

Check if self-employee	
------------------------	--

Preparer's identifying number

EIN ▶

Phone no 617-542-8155

Form 990-PF (2009)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
STATE STREET BANK & TRUST CO	4,601.	0.	4,601.
TOTAL TO FM 990-PF, PART I, LN 4	4,601.	0.	4,601.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
-------------	-----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	1,500.	1,500.		0.
TO FORM 990-PF, PG 1, LN 16B	1,500.	1,500.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
-------------	-------------------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT	1,546.	1,546.		0.
TO FORM 990-PF, PG 1, LN 16C	1,546.	1,546.		0.

FORM 990-PF	TAXES	STATEMENT	4
-------------	-------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	38.	38.		0.
TO FORM 990-PF, PG 1, LN 18	38.	38.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FILING FEES	35.	35.			0.
TO FORM 990-PF, PG 1, LN 23	35.	35.			0.

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
SEE ATTACHED SCHEDULE	202,929.		246,142.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	202,929.		246,142.	

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	7
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NAME OF MANAGER

STEPHANIE L. BRODY
SHERRY LEWIS
MARK HANLEY PAINE LEWIS

#04-6926501

The Bunky Fund

990-PF

Grants and Contributions Paid During the Year

RECIPIENT	ADDRESS	AMOUNT	PURPOSE
Courage Center	3915 Golden Valley Road Golden Valley, MN 55422	3,000.00	Unrestricted
The Nature Conservancy of MN	4245 North Fairfax Drive Arlington, VA 22203-1606	1,000.00	Unrestricted
Alzheimer's Association	225 N Michigan Avenue - Suite 1700 Chicago, IL 60601-7633	2,000.00	Unrestricted
Minnesota Landscape Arboretum	3675 Arboretum Drive Chaska, MN 55318	1,000.00	Unrestricted
Minnesota Public Radio	480 Cedar Street Saint Paul, MN 55101	1,000.00	Unrestricted
Minnesota Coalition for Battered Women	590 Park Street St Paul, MN 55103	1,000.00	Unrestricted
The Raptor Center	1920 Fitch Avenue St Paul, MN 55108	1,000.00	Unrestricted
American Farmland Trust	1200 18 th Street - Suite 800 Washington, DC 20036	500.00	Unrestricted
The Wilderness Society	1615 M Street, NW Washington, DC 20036	1,000.00	Unrestricted
Save-The-Redwoods League	114 Sansome Street San Francisco, CA 94104	2,000.00	Unrestricted
Kenyon College	College Relations Center Gambier, Ohio 43022	1,000.00	Unrestricted
Minnesota Orchestra	1111 Nicollet Mall Minneapolis, MN 55403	1,000.00	Unrestricted
Bainbridge Island Land Trust	P O Box 10144 Bainbridge Island, WA 98110	1,000.00	Unrestricted
Alaska State Audubon Society	715 L. Street, Suite 200 Anchorage, AK 995501	1,000.00	Unrestricted
TOTAL CONTRIBUTIONS		17,500.00	

2009 Tax Information Statement

Page 6 of 17

Account Number: BF0610
 Recipient's Tax ID number: 04-6926501
 Payer's Federal ID number: 20-8007203
 Questions? (800)392-9244
☐ Corrected ☐ 2nd TIN notice
 Revised: 03/10/2010

Payer's Name and Address
 STATE STREET BANK & TRUST COMPANY
 WMS TAX DEPARTMENT
 PO BOX 5300
 BOSTON, MA 02206-5300

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B								
150 0000	001055102	AFLAC INC COM	11/30/2004	02/02/2009	3,452 65	5,706 00	-2,253 35	0 00
70 0000	032511107	ANADARKO PETROLEUM CORP COM	VARIOUS	09/16/2009	4,518 38	1,786 45	2,731 93	0 00
50 0000	291011104	EMERSON ELECTRIC CO COM	04/28/2003	09/16/2009	2,015 94	1,262 50	753 44	0 00
35 0000	459200101	INTL BUSINESS MACHINES CORP CAP	12/28/2004	09/16/2009	4,190 09	3,431 75	758 34	0 00
50 0000	755111507	RAYTHEON CO COM NEW	09/29/2004	09/16/2009	2,294 44	1,837 00	457 44	0 00
75 0000	855030102	STAPLES INC COM	11/01/2000	09/16/2009	1,697 20	728 12	969 08	0 00
Total Long Term 15% Sales Reported on 1099-B						14,751.82	3,416.88	0 00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported





STATE STREET

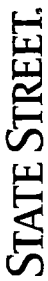
THE BUNKY FUND
C.ANDREW FULLER, STEPHANIE L. BRODY
SHERRY LEWIS, M HANLEY PAINE LEWIS &
LARK LEWIS AS TRUSTEES OF THE BUNKY
FUND-BFM INVESTMENT COUNSEL
Account Number XX0610

Account Diversification

December 31, 2009
Page 3 of 25

Diversification	Tax Cost	% Tax Cost	Market Value	% Market Value	Schedule of Bond Maturities	Face Value	% of Bond Portfolio
CASH AND EQUIVALENTS	\$23,923.04		\$23,923.04		Less than 1 year	0.00	0.00%
FIXED INCOME					1 to 5	0.00	0.00
GOVERNMENT AND AGENCY BONDS	\$0.00	0.00%	\$0.00	0.00%	5 to 10	0.00	0.00
CORPORATE BONDS	0.00	0.00	0.00	0.00	10 to 15	0.00	0.00
TOTAL FIXED INCOME	\$0.00	100.00%	\$0.00	100.00%	Over 15 years	0.00	0.00
EQUITIES					Total Bond Portfolio-	0.00	100.00%
CONSUMER NON-DURABLES	\$33,569.26	19.70%	\$47,163.10	21.58%			
CONSUMER SERVICES	22,570.70	13.25	29,379.23	13.43			
BUSINESS PRODUCTS & SERVICES	29,477.40	17.30	33,657.00	15.39			
CAPITAL GOODS	33,473.89	19.64	38,240.65	17.49			
ENERGY	12,246.92	7.19	21,962.40	10.04			
BASIC INDUSTRIES	8,799.00	5.16	21,527.50	9.84			
FINANCIAL	20,648.02	12.12	17,128.86	7.83			
UTILITIES	4,127.25	2.42	3,961.50	1.81			
MUTUAL FUNDS	5,490.00	3.22	5,670.00	2.59			
TOTAL EQUITIES	\$170,402.44	100.00%	\$218,690.24	100.00%			
FOREIGN ASSETS							
EQUITIES	\$17,648.00	54.26%	\$16,303.90	59.39%			
MUTUAL FUNDS	14,878.50	45.74	11,147.50	40.61			
TOTAL FOREIGN ASSETS	\$32,526.50	100.00%	\$27,451.40	100.00%			
OTHER ASSETS							
TOTAL OTHER ASSETS	\$0.00	100.00%	\$0.00	100.00%			
TOTAL ACCOUNT	\$226,851.98		\$270,064.68				





Account Holdings
As of December 31, 2009
Page 4 of 25

ENTERTAINMENT & LEISURE TIME



STATE STREET.

THE BUNKY FUND
C ANDREW FULLER, STEPHANIE L BRODY
SHERRY LEWIS, M HANLEY PAINE LEWIS &
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FUND-BFM INVESTMENT COUNSEL
Account Number XX0610

Account Holdings

As of December 31, 2009
Page 5 of 25

Shares/Units/ Original Face	Description	CUSIP	Tax Cost	Current Price	Market Value	Unrealized Gain/Loss	Annual Income/ Accrued Income	Current Yield
EQUITIES (Continued)								
CONSUMER SERVICES (Continued)								
RETAIL								
85,000	COSTCO WHOLESALE CORP	22180K105	\$4,201.55	59.170	\$5,029.45	\$827.90	\$81.20	1.22%
300,000	STAPLES INC	855030102	2,900.00	24.590	7,377.00	4,477.00	99.00	1.34
85,000	TARGET CORP	87812E106	4,548.35	48.370	4,111.45	436.90	24.75	
200,000	WALGREEN CO	931422109	7,096.00	36.720	7,344.00	248.00	57.80	1.41
TOTAL CONSUMER SERVICES			\$22,570.70		\$29,379.23	\$6,808.53	\$488.16	1.50
BUSINESS PRODUCTS & SERVICES								
ADVERTISING								
200,000	OMNICOM GROUP INC	681919106	\$8,137.00	35.150	\$7,830.00	\$507.00	\$120.00	1.53%
COMPUTER SERVICES								
100,000	AUTOMATIC DATA PROCESSING INC	053015103	\$4,229.68	42.820	\$4,282.00	\$52.32	\$136.00	3.18%
300,000	CISCO SYSTEMS INC	17275R102	5,829.00	23.940	7,182.00	1,353.00	34.00	0.00
200,000	MICROSOFT CORP	594918104	3,564.54	30.480	6,098.00	2,501.46	104.00	1.71
OTHER BUSINESS PRODS & SVCS								
100,000	3M CO	88579Y101	\$7,687.20	82.670	\$8,267.00	\$579.80	\$204.00	2.47%
TOTAL BUSINESS PRODUCTS & SERVICES			\$29,477.40		\$33,657.00	\$4,179.60	\$564.00	
CAPITAL GOODS								
ELECTRICAL EQUIPMENT								
150,000	EMERSON ELECTRIC CO	291011104	\$3,718.00	42.600	\$6,390.00	\$2,674.00	\$201.00	3.15%
100,000	GENERAL ELECTRIC CO	369604103	4,409.50	15.130	1,513.00	2,896.50	40.00	2.64
MACHINERY								
85,000	CATERPILLAR INC	140123101	\$5,371.15	56.990	\$4,844.15	\$527.00	\$142.80	2.95%





STATE STREET

THE BUNKY FUND
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FUND-BFM INVESTMENT COUNSEL
Account Number XX0610

Account Holdings

As of December 31, 2009
Page 6 of 25

Shares/Units/ Original Face	Description	CUSIP	Tax Cost	Current Price	Market Value	Unrealized Gain/Loss	Annual Income/ Accrued Income	Current Yield
EQUITIES (Continued)								
CAPITAL GOODS (Continued)								
MANUFACTURING-DIVERSIFIED								
100,000	ILLINOIS TOOL WORKS INC.	452308109	\$4,413.00	47.990	\$4,799.00	\$386.00	\$124.00	2.58%
							31.00	
AEROSPACE & DEFENSE								
75,000	RAYTHEON CO.	755111507	\$2,755.50	51.520	\$3,864.00	\$1,108.50	\$93.00	2.41%
							23.25	
COMPUTER & BUSINESS EQUIPMENT								
200,000	CITRIX SYSTEM INC.	177378100	\$6,908.24	41.610	\$8,322.00	\$1,412.76	\$0.00	0.00%
							0.00	
65,000	IBM CORP.	459200101	5,899.50	130.900	8,508.50	2,609.00	143.00	1.68%
							0.00	
TOTAL CAPITAL GOODS						\$4,766.76	\$743.80	\$64.25
ENERGY								
OIL-INTEGRATED								
81,000	DEVON ENERGY CORP.	25179W103	\$5,043.87	73.500	\$5,953.50	\$909.63	\$51.84	0.87%
							0.00	
70,000	EXXON MOBIL CORP.	30231G102	3,154.00	68.190	4,773.30	1,619.30	117.60	2.46%
							0.00	
OTHER ENERGY								
180,000	ANADARKO PETROLEUM CORP.	032511107	\$4,049.05	62.420	\$11,235.60	\$7,186.55	\$64.80	0.58%
							0.00	
TOTAL ENERGY						\$9,715.48	\$234.24	\$0.00
BASIC INDUSTRIES								
CHEMICALS - MAJOR								
75,000	ATR PRODUCTS & CHEMICALS INC.	069158106	\$4,038.75	61.080	\$6,079.50	\$2,040.75	\$135.00	2.22%
							39.75	
CHEMICALS-SPECIALTY								
275,000	RPM CORP.	749685103	\$4,760.25	20.330	\$5,590.75	\$830.50	\$225.50	4.03%
							0.00	
195,000	SIGMA ALDRICH CORP.	826552101	0.00	50.550	9,857.25	9,857.25	113.10	1.15%
							0.00	
TOTAL BASIC INDUSTRIES						\$12,728.50	\$473.60	\$33.75



STATE STREET.

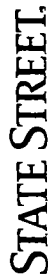
THE BUNKY FUND
C. ANDREW FULLER, STEPHANIE L. BRODY
SHERRY LEWIS, M. HANLEY PAINE LEWIS &
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FUND-BFM INVESTMENT COUNSEL
Account Number: XX0610

Account Holdings

As of December 31, 2009
Page 7 of 25

Shares/Units/ Original Face	Description	CUSIP	Tax Cost	Current Price	Market Value	Unrealized Gain/Loss	Annual Income/ Accrued Income	Current Yield
EQUITIES (Continued)								
FINANCIAL								
BANKS								
188,000	BANK OF NEW YORK MELLON CORP	064058100	\$7,141.63	27.970	\$5,258.36	\$1,883.27	\$87.68	1.29%
150,000	WELLS FARGO & CO	949746101	4,785.00	26.990	4,048.50	736.50	30.00	0.74
OTHER FINANCIAL								
100,000	AMERICAN EXPRESS CO	025818109	\$5,185.00	40.520	\$4,052.00	\$1,133.00	\$72.00	1.78%
200,000	WESTERN UNION CO	959802109	3,556.39	18.850	3,770.00	213.61	12.00	0.32
TOTAL FINANCIAL								
			\$20,648.02		\$17,128.86	\$3,519.16	\$181.68	
							\$0.00	
UTILITIES								
75,000	ELECTRIC POWER UTILITIES FPL GROUP INC	302571104	\$4,127.25	\$2.820	\$3,961.50	\$165.75	\$141.75	3.58%
TOTAL UTILITIES								
			\$4,127.25		\$3,961.50	\$165.75	\$141.75	
							\$0.00	
MUTUAL FUNDS								
600,000	EQUITY MUTUAL FUNDS ROYCE PENNSYLVANIA MUTUAL FUND	780905840	\$5,450.00	9.450	\$5,870.00	\$180.00	\$4.80	0.08%
TOTAL MUTUAL FUNDS								
			\$5,450.00		\$5,870.00	\$180.00	\$4.80	
							\$0.00	
TOTAL EQUITIES								
			\$170,402.44		\$218,690.24	\$48,287.80	\$3,789.83	
							\$257.50	
FOREIGN ASSETS								
EQUITIES								
30,000	ISHARES MSCI EMERGING MKTS INDEX FUND	464287465	\$1,488.60	41.500	\$1,245.00	\$243.60	\$0.72	0.06%
130,000	ISHARES MSCI EAFE INDEX FUND	464287465	9,987.90	55.280	7,186.40	2,801.50	187.33	2.61
50,000	SCHLUMBERGER LTD	806657108	2,469.50	65.090	3,254.50	785.00	42.00	1.29%
TOTAL FOREIGN ASSETS								
							10.50	





Account Holdings

As of December 31, 2009

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THE BUNKY FUND
C ANDREW FULLER, STEPHANIE L. BRODY
SHERRY LEWIS, M HANLEY PAINE LEWIS &
LARK LEWIS AS TRUSTEES OF THE BUNKY
FUND-BFM INVESTMENT COUNSEL
Account Number: XX0610

Shares/Units/ Original Face	Description	CUSIP	Tax Cost	Current Price	Market Value	Unrealized Gain/Loss	Annual Income/ Accrued Income	Current Yield
FOREIGN ASSETS (Continued)								
EQUITIES (Continued)								
200 000	VODAFONE GROUP PLC ADR	92857W209	3,682.00	23.090	4,618.00	936.00	258.20	5.59
TOTAL EQUITIES			\$17,648.00		\$16,303.90	\$1,344.10-	\$488.25	
							\$98.01	
MUTUAL FUNDS								
350,000	DODGE & COX INTERNATIONAL STOCK FUND	256206103	\$14,878.50	\$117.47150	\$3,731.00-		\$152.60	1.37%
TOTAL MUTUAL FUNDS			\$14,878.50		\$11,147.50	\$3,731.00-	\$152.60	
							\$0.00	
TOTAL FOREIGN ASSETS			\$32,526.50		\$27,451.40	\$5,075.10-	\$640.85	
							\$98.01	
TOTAL ACCOUNT HOLDINGS			\$226,851.98		\$270,064.68	\$43,212.70	\$4,433.06	
							\$355.82	

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

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

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

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

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	THE BUNKY FUND	04-6926501
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O BARNEKE AND ANDERSON LLP, 211 CONGRESS ST	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. BOSTON, MA 02110	

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

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

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

BARNEKE AND ANDERSON, LLP - C/O BARNEKE AND ANDERSON

- The books are in the care of ☒ **LLP, 211 CONGRESS ST - BOSTON, MA 02110**

Telephone No. **617-542-8155**

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010.**

5 For calendar year **2009**, or other tax year beginning _____, and ending _____.

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

7 State in detail why you need the extension

**ADDITIONAL TIME IS NEEDED IN ORDER TO GATHER THE INFORMATION
NECESSARY TO FILE A COMPLETE AND ACCURATE INCOME TAX RETURN.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	49.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	206.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

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

Signature ☐

Title **CPA**

Date ☐

Form 8868 (Rev 4-2009)