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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

, 2009, and ending

G Check all that apply

☐ Initial return☐ Initial Return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the  
IRS label  
Other, write,  
print  
or type  
See Specific  
Instructions.WUNSCH FOUNDATION, INC.  
902 BROADWAY, SUITE 1603  
NEW YORK, NY 10010

A Employer identification number

11-6006013

B Telephone number (see the instructions)

212-889-8790

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year  
(from Part II, column (c), line 16)

▶ \$ 7,550,110.

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

(Part I, column (d) must be on cash basis)

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE

1 Contributions, gifts, grants, etc., received (att sch)

75,000.

2 Ck ☐ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

334,726.

334,726.

334,726.

4 Dividends and interest from securities

91,345.

91,345.

91,345.

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

-43,880.

b Gross sales price for all assets on line 6a 1,287,918.

7 Capital gain net income (from Part IV, line 2)

0.

8 Net short-term capital gain

0.

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

457,191.

426,071.

426,071.

13 Compensation of officers, directors, trustees, etc.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch)

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule) (see instr.) See Stmt 1

11,250.

11,250.

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 2

263.

263.

24 Total operating and administrative expenses. Add lines 13 through 23

11,513.

11,513.

25 Contributions, gifts, grants paid Part XV

326,261.

326,261.

26 Total expenses and disbursements. Add lines 24 and 25

337,774.

11,513.

0.

326,261.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

119,417.

b Net investment income (if negative, enter -0-)

414,558.

c Adjusted net income (if negative, enter -0-)

426,071.

ADMINISTRATIVE AND  
OPERATING EXPENSES  
SCANNED NOV 17 2010

| Part II Balance Sheets      |                                                                       | Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)                     | Beginning of year                                  | End of year    |                       |
|-----------------------------|-----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|----------------|-----------------------|
|                             |                                                                       |                                                                                                                                        | (a) Book Value                                     | (b) Book Value | (c) Fair Market Value |
| ASSETS                      | 1                                                                     | Cash – non-interest-bearing                                                                                                            |                                                    |                |                       |
|                             | 2                                                                     | Savings and temporary cash investments                                                                                                 | 42,027.                                            | 182,859.       | 182,859.              |
|                             | 3                                                                     | Accounts receivable                                                                                                                    |                                                    |                |                       |
|                             |                                                                       | Less allowance for doubtful accounts                                                                                                   |                                                    |                |                       |
|                             | 4                                                                     | Pledges receivable                                                                                                                     |                                                    |                |                       |
|                             |                                                                       | Less allowance for doubtful accounts                                                                                                   |                                                    |                |                       |
|                             | 5                                                                     | Grants receivable                                                                                                                      |                                                    |                |                       |
|                             | 6                                                                     | Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)            |                                                    |                |                       |
|                             | 7                                                                     | Other notes and loans receivable (attach sch)                                                                                          |                                                    |                |                       |
|                             |                                                                       | Less allowance for doubtful accounts                                                                                                   |                                                    |                |                       |
|                             | 8                                                                     | Inventories for sale or use                                                                                                            |                                                    |                |                       |
|                             | 9                                                                     | Prepaid expenses and deferred charges                                                                                                  |                                                    |                |                       |
|                             | 10a                                                                   | Investments – U S and state government obligations (attach schedule)                                                                   | 219,096.                                           | 238,594.       | 239,037.              |
|                             | b                                                                     | Investments – corporate stock (attach schedule)                                                                                        | 2,353,367.                                         | 2,275,938.     | 1,651,180.            |
|                             | c                                                                     | Investments – corporate bonds (attach schedule)                                                                                        | 5,690,534.                                         | 5,755,661.     | 5,279,784.            |
|                             | LIABILITIES                                                           | 11                                                                                                                                     | Investments – land, buildings, and equipment basis |                |                       |
|                             |                                                                       | Less accumulated depreciation (attach schedule)                                                                                        |                                                    |                |                       |
| 12                          |                                                                       | Investments – mortgage loans                                                                                                           |                                                    |                |                       |
| 13                          |                                                                       | Investments – other (attach schedule)                                                                                                  |                                                    |                |                       |
| 14                          |                                                                       | Land, buildings, and equipment basis                                                                                                   |                                                    |                |                       |
|                             |                                                                       | Less accumulated depreciation (attach schedule)                                                                                        |                                                    |                |                       |
| 15                          |                                                                       | Other assets (describe See Statement 3)                                                                                                | 197,250.                                           | 197,250.       | 197,250.              |
| 16                          |                                                                       | Total assets (to be completed by all filers – see instructions Also, see page 1, item I)                                               | 8,502,274.                                         | 8,650,302.     | 7,550,110.            |
| 17                          |                                                                       | Accounts payable and accrued expenses                                                                                                  |                                                    | 28,611.        |                       |
| 18                          |                                                                       | Grants payable                                                                                                                         |                                                    |                |                       |
| NET ASSETS OR FUND BALANCES | 19                                                                    | Deferred revenue                                                                                                                       |                                                    |                |                       |
|                             | 20                                                                    | Loans from officers, directors, trustees, & other disqualified persons                                                                 |                                                    |                |                       |
|                             | 21                                                                    | Mortgages and other notes payable (attach schedule)                                                                                    |                                                    |                |                       |
|                             | 22                                                                    | Other liabilities (describe )                                                                                                          |                                                    |                |                       |
|                             | 23                                                                    | Total liabilities (add lines 17 through 22)                                                                                            | 0.                                                 | 28,611.        |                       |
|                             |                                                                       | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/> |                                                    |                |                       |
|                             | 24                                                                    | Unrestricted                                                                                                                           | 8,502,274.                                         | 8,621,691.     |                       |
|                             | 25                                                                    | Temporarily restricted                                                                                                                 |                                                    |                |                       |
|                             | 26                                                                    | Permanently restricted                                                                                                                 |                                                    |                |                       |
|                             |                                                                       | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>                         |                                                    |                |                       |
| 27                          | Capital stock, trust principal, or current funds                      |                                                                                                                                        |                                                    |                |                       |
| 28                          | Paid-in or capital surplus, or land, building, and equipment fund     |                                                                                                                                        |                                                    |                |                       |
| 29                          | Retained earnings, accumulated income, endowment, or other funds      |                                                                                                                                        |                                                    |                |                       |
| 30                          | Total net assets or fund balances (see the instructions)              | 8,502,274.                                                                                                                             | 8,621,691.                                         |                |                       |
| 31                          | Total liabilities and net assets/fund balances (see the instructions) | 8,502,274.                                                                                                                             | 8,650,302.                                         |                |                       |

## 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 | 8,502,274. |
| 2 | Enter amount from Part I, line 27a                                                                                                                         | 2 | 119,417.   |
| 3 | Other increases not included in line 2 (itemize)                                                                                                           | 3 |            |
| 4 | Add lines 1, 2, and 3                                                                                                                                      | 4 | 8,621,691. |
| 5 | Decreases not included in line 2 (itemize)                                                                                                                 | 5 |            |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30                                                      | 6 | 8,621,691. |

**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 shares MLC Company) |  | (b) How acquired<br>P — Purchase<br>D — Donation | (c) Date acquired<br>(month, day, year) | (d) Date sold<br>(month, day, year) |
|------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------|-----------------------------------------|-------------------------------------|
| <b>1 a</b> SEE SCHEDULE ATTACHED                                                                                                         |  | P                                                | Various                                 | Various                             |
| <b>b</b>                                                                                                                                 |  |                                                  |                                         |                                     |
| <b>c</b>                                                                                                                                 |  |                                                  |                                         |                                     |
| <b>d</b>                                                                                                                                 |  |                                                  |                                         |                                     |
| <b>e</b>                                                                                                                                 |  |                                                  |                                         |                                     |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| <b>a</b> 1,287,918.   |                                            | 1,331,798.                                      | -43,880.                                     |
| <b>b</b>              |                                            |                                                 |                                              |
| <b>c</b>              |                                            |                                                 |                                              |
| <b>d</b>              |                                            |                                                 |                                              |
| <b>e</b>              |                                            |                                                 |                                              |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |                                                     | (i) Gains (Column (h)<br>gain minus column (k), but not less<br>than -0-) or Losses (from column (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| (i) Fair Market Value<br>as of 12/31/69                                                     | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of column (i)<br>over column (j), if any |                                                                                                       |
| <b>a</b>                                                                                    |                                      |                                                     | -43,880.                                                                                              |
| <b>b</b>                                                                                    |                                      |                                                     |                                                                                                       |
| <b>c</b>                                                                                    |                                      |                                                     |                                                                                                       |
| <b>d</b>                                                                                    |                                      |                                                     |                                                                                                       |
| <b>e</b>                                                                                    |                                      |                                                     |                                                                                                       |

|                                                                                                                            |                                                                                                            |          |          |
|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|----------|----------|
| <b>2</b> Capital gain net income or (net capital loss)                                                                     | <div>— <div>If gain, also enter in Part I, line 7<br/>If (loss), enter -0- in Part I, line 7</div> —</div> | <b>2</b> | -43,880. |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)                                      |                                                                                                            |          |          |
| <div>If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8</div> | <div>— —</div>                                                                                             | <b>3</b> | -43,880. |

**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

| <b>1</b> Enter the appropriate amount in each column for each year, see the instructions before making any entries |                                       |                                              |                                                              |
|--------------------------------------------------------------------------------------------------------------------|---------------------------------------|----------------------------------------------|--------------------------------------------------------------|
| (a) Base period years<br>Calendar year (or tax year<br>beginning in)                                               | (b) Adjusted qualifying distributions | (c) Net value of<br>noncharitable-use assets | (d) Distribution ratio<br>(column (b) divided by column (c)) |
| 2008                                                                                                               | 367,086.                              | 6,673,734.                                   | 0.055005                                                     |
| 2007                                                                                                               | 338,100.                              | 7,816,990.                                   | 0.043252                                                     |
| 2006                                                                                                               | 370,277.                              | 7,347,922.                                   | 0.050392                                                     |
| 2005                                                                                                               | 353,507.                              | 7,062,853.                                   | 0.050052                                                     |
| 2004                                                                                                               | 313,717.                              | 7,189,242.                                   | 0.043637                                                     |

|                                                                                                                                                                                       |          |            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------|
| <b>2</b> Total of line 1, column (d)                                                                                                                                                  | <b>2</b> | 0.242338   |
| <b>3</b> Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | <b>3</b> | 0.048468   |
| <b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5                                                                                                 | <b>4</b> | 6,413,637. |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                    | <b>5</b> | 310,856.   |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | <b>6</b> | 4,146.     |
| <b>7</b> Add lines 5 and 6                                                                                                                                                            | <b>7</b> | 315,002.   |
| <b>8</b> Enter qualifying distributions from Part XII, line 4                                                                                                                         | <b>8</b> | 326,261.   |

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

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

|                                                                                                                                                              |            |           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|
| 1 a 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 instr.)                                                               |            |           |
| 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 4,146.  |
| 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 foundations only. Others enter -0-)                                                  |            | 2 0.      |
| 3 Add lines 1 and 2                                                                                                                                          |            | 3 4,146.  |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                |            | 4 0.      |
| 5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-                                                             |            | 5 4,146.  |
| 6 Credits/Payments                                                                                                                                           |            |           |
| a 2009 estimated tax pmts and 2008 overpayment credited to 2009                                                                                              | 6a 12,047. |           |
| 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 12,047. |
| 8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached                        |            | 8         |
| 9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>                                                                |            | 9 0.      |
| 10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>                                                   |            | 10 7,901. |
| 11 Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input checked="" type="checkbox"/>      | 7,901.     | 11 0.     |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                      | Yes | No  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|
| 1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?                                                                                                                                                             |     | X   |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?                                                                                                                                                                                         |     | X   |
| If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities                                                                                                                                         |     |     |
| c Did the foundation file <b>Form 1120-POL</b> for this year?                                                                                                                                                                                                                                                                        |     | X   |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.                                                                                                               |     |     |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.                                                                                                                                                                |     |     |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>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   |
| 4 a 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 <b>Form 990-T</b> for this year?                                                                                                                                                                                                                                                            |     | N/A |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br>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:<br>• By language in the governing instrument, or<br>• 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, column (c), and Part XIV                                                                                                                                                                                               | X   |     |
| 8 a Enter the states to which the foundation reports or with which it is registered (see the instructions)<br>NY                                                                                                                                                                                                                     |     |     |
| 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   |

BAA

Form 990-PF (2009)

**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?<br>Website address <u>N/A</u>                                                           | 13 | X |     |
| 14 | The books are in care of <u>WUNSCH FOUNDATION, INC.</u> Telephone no <u></u><br>Located at <u>902 BROADWAY, SUITE 1603, NEW YORK, NY</u> ZIP + 4 <u>10010</u>                                               |    |   |     |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u><br>and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> |    |   | 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  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|-----|
| <b>1a</b> 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>b</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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>                                                                                                                                                           | <b>1b</b>                                                           | N/A |
| <b>c</b> 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?                                                                                                                                                                                                                                                                                                        | <b>1c</b>                                                           | X   |
| <b>2</b> 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))                                                                                                                                                                                                                                                                                                                  |                                                                     |     |
| <b>a</b> 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?<br>If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>                                                                                                                                                                                                                                                            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |     |
| <b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 the instructions)                                                                                                                                                                            | <b>2b</b>                                                           | N/A |
| <b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here<br><u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>                                                                                                                                                                                                                                                                                                                       |                                                                     |     |
| <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?                                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 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) | <b>3b</b>                                                           | N/A |
| <b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                               | <b>4a</b>                                                           | 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?                                                                                                                                                                                                                                                              | <b>4b</b>                                                           | X   |

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

5b 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?

6b X

If 'Yes' to 6b, file Form 8870

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

7b N/A

**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 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 |
|----------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| ERIC M. WUNSCH<br>45 GRAMERCY PARK NORTH<br>NEW YORK, NY 10010 | PRESIDENT<br>5.00                                        | 0.                                        | 0.                                                                    | 0.                                    |
| ETHEL WUNSCH<br>45 GRAMERCY PARK NORTH<br>NEW YORK, NY 10010   | SECRETARY<br>2.00                                        | 0.                                        | 0.                                                                    | 0.                                    |
| PETER WUNSCH<br>33 FIFTH AVENUE<br>NEW YORK, NY 10003          | TREASURER<br>2.00                                        | 0.                                        | 0.                                                                    | 0.                                    |
|                                                                |                                                          |                                           |                                                                       |                                       |

**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 | (e) Expense account, other allowances |
|---------------------------------------------------------------|----------------------------------------------------------|------------------|-----------------------------------------------------------------------|---------------------------------------|
| NONE                                                          |                                                          |                  |                                                                       |                                       |
|                                                               | 0                                                        | 0.               | 0.                                                                    | 0.                                    |
|                                                               |                                                          |                  |                                                                       |                                       |
|                                                               |                                                          |                  |                                                                       |                                       |
|                                                               |                                                          |                  |                                                                       |                                       |
|                                                               |                                                          |                  |                                                                       |                                       |

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

0

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE'.

| (a) Name and address of each person paid more than \$50,000                     | (b) Type of service | (c) Compensation |
|---------------------------------------------------------------------------------|---------------------|------------------|
| None                                                                            |                     |                  |
|                                                                                 |                     |                  |
|                                                                                 |                     |                  |
|                                                                                 |                     |                  |
|                                                                                 |                     |                  |
|                                                                                 |                     |                  |
|                                                                                 |                     |                  |
| <b>Total</b> number of others receiving over \$50,000 for professional services |                     | 0                |

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

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

|                   | Expenses |
|-------------------|----------|
| 1 See Statement 4 |          |
| 2                 |          |
| 3                 |          |
| 4                 |          |

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

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 | Amount |
|------------------------------------------------------------------------------------------------------------------|--------|
| 1 N/A                                                                                                            |        |
| 2                                                                                                                |        |
| All other program-related investments See instructions                                                           |        |
| 3                                                                                                                |        |
| <b>Total.</b> Add lines 1 through 3                                                                              | 0.     |

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

|                                                                                                                     |           |            |
|---------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes |           |            |
| <b>a</b> Average monthly fair market value of securities                                                            | <b>1a</b> | 6,127,183. |
| <b>b</b> Average of monthly cash balances                                                                           | <b>1b</b> | 186,874.   |
| <b>c</b> Fair market value of all other assets (see instructions)                                                   | <b>1c</b> | 197,250.   |
| <b>d</b> Total (add lines 1a, b, and c)                                                                             | <b>1d</b> | 6,511,307. |
| <b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  | <b>1e</b> | 0.         |
| <b>2</b> Acquisition indebtedness applicable to line 1 assets                                                       | <b>2</b>  | 0.         |
| <b>3</b> Subtract line 2 from line 1d                                                                               | <b>3</b>  | 6,511,307. |
| <b>4</b> Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)   | <b>4</b>  | 97,670.    |
| <b>5</b> Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4        | <b>5</b>  | 6,413,637. |
| <b>6</b> Minimum investment return. Enter 5% of line 5                                                              | <b>6</b>  | 320,682.   |

**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.)

|                                                                                                           |           |          |
|-----------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b> Minimum investment return from Part X, line 6                                                    | <b>1</b>  | 320,682. |
| <b>2a</b> Tax on investment income for 2009 from Part VI, line 5                                          | <b>2a</b> | 4,146.   |
| <b>b</b> Income tax for 2009 (This does not include the tax from Part VI )                                | <b>2b</b> |          |
| <b>c</b> Add lines 2a and 2b                                                                              | <b>2c</b> | 4,146.   |
| <b>3</b> Distributable amount before adjustments Subtract line 2c from line 1                             | <b>3</b>  | 316,536. |
| <b>4</b> Recoveries of amounts treated as qualifying distributions                                        | <b>4</b>  |          |
| <b>5</b> Add lines 3 and 4                                                                                | <b>5</b>  | 316,536. |
| <b>6</b> Deduction from distributable amount (see instructions)                                           | <b>6</b>  |          |
| <b>7</b> Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1 | <b>7</b>  | 316,536. |

**Part XII Qualifying Distributions** (see instructions)

|                                                                                                                                                              |           |          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes                                                           |           |          |
| <b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26                                                                       | <b>1a</b> | 326,261. |
| <b>b</b> Program-related investments — total from Part IX-B                                                                                                  | <b>1b</b> |          |
| <b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                                           | <b>2</b>  |          |
| <b>3</b> Amounts set aside for specific charitable projects that satisfy the                                                                                 |           |          |
| <b>a</b> Suitability test (prior IRS approval required)                                                                                                      | <b>3a</b> |          |
| <b>b</b> Cash distribution test (attach the required schedule)                                                                                               | <b>3b</b> |          |
| <b>4</b> Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4                                            | <b>4</b>  | 326,261. |
| <b>5</b> Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions) | <b>5</b>  | 4,146.   |
| <b>6</b> Adjusted qualifying distributions. Subtract line 5 from line 4                                                                                      | <b>6</b>  | 322,115. |

**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)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2009 from Part XI, line 7                                                                                                                       |               |                            |             | 316,536.    |
| <b>2</b> Undistributed income, if any, as of the end of 2009                                                                                                                      |               |                            |             |             |
| <b>a</b> Enter amount for 2008 only                                                                                                                                               |               |                            | 324,675.    |             |
| <b>b</b> Total for prior years 20__, 20__, 20__                                                                                                                                   |               | 0.                         |             |             |
| <b>3</b> 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                                                                                                                                                                |               |                            |             |             |
| <b>e</b> From 2008                                                                                                                                                                |               |                            |             |             |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| <b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 326,261.                                                                                                    |               |                            |             |             |
| <b>a</b> Applied to 2008, but not more than line 2a                                                                                                                               |               |                            | 324,675.    |             |
| <b>b</b> Applied to undistributed income of prior years (Election required – see instructions)                                                                                    |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required – see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2009 distributable amount                                                                                                                                     |               |                            |             | 1,586.      |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a) )                                        | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> 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.                         |             |             |
| <b>c</b> 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.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions                                                                                                          |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount – see instructions                                                                            |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010                                                                |               |                            |             | 314,950.    |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)                                  | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)                                                                              | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| <b>10</b> Analysis of line 9                                                                                                                                                      |               |                            |             |             |
| <b>a</b> Excess from 2005                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2006                                                                                                                                                         |               |                            |             |             |
| <b>c</b> Excess from 2007                                                                                                                                                         |               |                            |             |             |
| <b>d</b> Excess from 2008                                                                                                                                                         |               |                            |             |             |
| <b>e</b> Excess from 2009                                                                                                                                                         |               |                            |             |             |

|                 |                                                                                    |
|-----------------|------------------------------------------------------------------------------------|
| <b>Part XIV</b> | <b>Private Operating Foundations</b> (see instructions and Part VII-A, question 9) |
|-----------------|------------------------------------------------------------------------------------|

N/A

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling

**b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or

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

**b** 85% of line 2a

**c** Qualifying distributions from Part XII,  
line 4 for each year listed

**d** Amounts included in line 2c not used directly for active conduct of exempt activities

**e** Qualifying distributions made directly for active conduct of exempt activities  
Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon

a 'Assets' alternative test – enter

**(1) Value of all assets**

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

**b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c 'Support' alternative test – enter

**(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

**(2)** Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

**(3) Largest amount of support from an exempt organization**

**(4) Gross investment income.**

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

None

**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 IV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business) | If recipient is an individual,<br>show any relationship to<br>any foundation manager or<br>substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount   |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------|----------|
| <i>a</i> Paid during the year<br>See Statement 5 |                                                                                                                    |                                      |                                     |          |
| <b>Total</b>                                     |                                                                                                                    |                                      | <b>3a</b>                           | 326,261. |
| <i>b</i> Approved for future payment             |                                                                                                                    |                                      |                                     |          |
| <b>Total</b>                                     |                                                                                                                    |                                      | <b>3b</b>                           |          |

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

Enter gross amounts unless otherwise indicated

| Enter gross amounts unless otherwise indicated             | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(see the instructions) |
|------------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|-----------------------------------------------------------------------|
|                                                            | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>Amount |                                                                       |
| 1 Program service revenue.                                 |                           |               |                                      |               |                                                                       |
| a                                                          |                           |               |                                      |               |                                                                       |
| b                                                          |                           |               |                                      |               |                                                                       |
| c                                                          |                           |               |                                      |               |                                                                       |
| d                                                          |                           |               |                                      |               |                                                                       |
| e                                                          |                           |               |                                      |               |                                                                       |
| f                                                          |                           |               |                                      |               |                                                                       |
| g Fees and contracts from government agencies              |                           |               |                                      |               |                                                                       |
| 2 Membership dues and assessments                          |                           |               |                                      |               |                                                                       |
| 3 Interest on savings and temporary cash investments       |                           |               | 14                                   | 334,726.      |                                                                       |
| 4 Dividends and interest from securities                   |                           |               | 14                                   | 91,345.       |                                                                       |
| 5 Net rental income or (loss) from real estate             |                           |               |                                      |               |                                                                       |
| a Debt-financed property                                   |                           |               |                                      |               |                                                                       |
| b Not debt-financed property                               |                           |               |                                      |               |                                                                       |
| 6 Net rental income or (loss) from personal property       |                           |               |                                      |               |                                                                       |
| 7 Other investment income                                  |                           |               |                                      |               |                                                                       |
| 8 Gain or (loss) from sales of assets other than inventory |                           |               |                                      |               | -43,880.                                                              |
| 9 Net income or (loss) from special events                 |                           |               |                                      |               |                                                                       |
| 10 Gross profit or (loss) from sales of inventory          |                           |               |                                      |               |                                                                       |
| 11 Other revenue                                           |                           |               |                                      |               |                                                                       |
| a                                                          |                           |               |                                      |               |                                                                       |
| b                                                          |                           |               |                                      |               |                                                                       |
| c                                                          |                           |               |                                      |               |                                                                       |
| d                                                          |                           |               |                                      |               |                                                                       |
| e                                                          |                           |               |                                      |               |                                                                       |
| 12 Subtotal Add columns (b), (d), and (e)                  |                           |               |                                      | 426,071.      | -43,880.                                                              |
| 13 Total. Add line 12, columns (b), (d), and (e)           |                           |               |                                      | 13            | 382,191.                                                              |

(See worksheet in the instructions for line 13 to verify calculations.)

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

[illegible]



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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ **Attach to Form 990, 990-EZ, or 990-PF**

OMB No 1545-0047

**2009**

Name of the organization

WUNSCH FOUNDATION, INC.

Employer identification number

11-6006013

**Organization type** (check one)

**Filers of:**

Form 990 or 990-EZ

**Section:**

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

Form 990-PF

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

Check if your organization is covered by the **General Rule** or a **Special Rule**

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

**General Rule –**

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

**Special Rules –**

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

**Caution:** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.**

**Schedule B** (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

WUNSCH FOUNDATION, INC.

11-6006013

**Part I** Contributors (see instructions)

| (a)<br>Number | (b)<br>Name, address, and ZIP + 4                                          | (c)<br>Aggregate<br>contributions | (d)<br>Type of contribution                                                                                                                                                         |
|---------------|----------------------------------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1             | WEA ENTERPRISES INC<br>C/O A&J SERVICE, 902 BROADWAY<br>NEW YORK, NY 10010 | \$ 50,000.                        | Person <input checked="checked" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
| 2             | 9TH AVENUE EQUITIES<br>C/O A&J SERVICE, 902 BROADWAY<br>NEW YORK, NY 10010 | \$ 25,000.                        | Person <input checked="checked" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
|               |                                                                            | \$                                | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|               |                                                                            | \$                                | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|               |                                                                            | \$                                | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|               |                                                                            | \$                                | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |
|               |                                                                            | \$                                | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)                   |



Name of organization

Employer identification number

WUNSCH FOUNDATION, INC.

11-6006013

**Part II** Noncash Property (see instructions)

| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|---------------------------|----------------------------------------------|------------------------------------------------|----------------------|
|                           | N/A                                          |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

WUNSCH FOUNDATION, INC.

11-6006013

**Part III Exclusively religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year.** (Complete cols (a) through (e) and the following line entry )For organizations completing Part III, enter total of *exclusively* religious, charitable, etc, contributions of **\$1,000 or less** for the year (Enter this information once – see instructions ) ▶ \$ N/A

| (a)<br>No. from<br>Part I | (b)<br>Purpose of gift                  | (c)<br>Use of gift | (d)<br>Description of how gift is held   |
|---------------------------|-----------------------------------------|--------------------|------------------------------------------|
|                           | N/A                                     |                    |                                          |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           | (e)<br>Transfer of gift                 |                    |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                    | Relationship of transferor to transferee |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           | (e)<br>Transfer of gift                 |                    |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                    | Relationship of transferor to transferee |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           | (e)<br>Transfer of gift                 |                    |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                    | Relationship of transferor to transferee |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           | (e)<br>Transfer of gift                 |                    |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                    | Relationship of transferor to transferee |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           | (e)<br>Transfer of gift                 |                    |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                    | Relationship of transferor to transferee |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |
|                           |                                         |                    |                                          |

Client 1

WUNSCH FOUNDATION, INC.

11-6006013

**Statement 1**  
**Form 990-PF, Part I, Line 18**  
**Taxes**

|                    | (a)<br>Expenses<br>per Books | (b) Net<br>Investment<br>Income | (c)<br>Adjusted<br>Net Income | (d)<br>Charitable<br>Purposes |
|--------------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| Federal excise tax | \$ 11,000.                   | \$ 11,000.                      |                               |                               |
| NYS Dept of Law    | 250.                         | 250.                            |                               |                               |
| <b>Total</b>       | <b>\$ 11,250.</b>            | <b>\$ 11,250.</b>               | <b>\$ 0.</b>                  | <b>\$ 0.</b>                  |

**Statement 2**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

|              | (a)<br>Expenses<br>per Books | (b) Net<br>Investment<br>Income | (c)<br>Adjusted<br>Net Income | (d)<br>Charitable<br>Purposes |
|--------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| Bank Charges | \$ 263.                      | \$ 263.                         |                               |                               |
| <b>Total</b> | <b>\$ 263.</b>               | <b>\$ 263.</b>                  | <b>\$ 0.</b>                  | <b>\$ 0.</b>                  |

**Statement 3**  
**Form 990-PF, Part II, Line 15**  
**Other Assets**

|                       | <u>Book Value</u>  | <u>Fair Market Value</u> |
|-----------------------|--------------------|--------------------------|
| SEE SCHEDULE ATTACHED | \$ 197,250.        | \$ 197,250.              |
| <b>Total</b>          | <b>\$ 197,250.</b> | <b>\$ 197,250.</b>       |

**Statement 4**  
**Form 990-PF, Part IX-A, Line 1**  
**Summary of Direct Charitable Activities**

| <u>Direct Charitable Activities</u>                                                                                                                                                                                                                                                                                          | <u>Expenses</u> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| THE FOUNDATION LENDS AND CONTRIBUTES ARTWORK AND ARTIFACTS TO VARIOUS MUSEUMS THROUGHOUT THE COUNTRY. ALL SUCH ASSETS CURRENTLY OWNED BY THE ORGANIZATION, A LIST OF WHICH IS ATTACHED TO FORM 990-PF, ARE ON LOAN TO SUCH INSTITUTIONS. THE ORGANIZATION ALSO MAKES MONEY CONTRIBUTIONS TO VARIOUS NONPROFIT ORGANIZATIONS. |                 |

Client 1

WUNSCH FOUNDATION, INC.

11-6006013

**Statement 5**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

| <u>Name and Address</u>                                                           | <u>Donee Relationship</u> | <u>Found-<br/>ation<br/>Status</u> | <u>Purpose of<br/>Grant</u>      | <u>Amount</u> |
|-----------------------------------------------------------------------------------|---------------------------|------------------------------------|----------------------------------|---------------|
| METROPOLITAN MUSEUM OF ART<br>1000 5TH AVENUE<br>NEW YORK, NY 10028,              | N/A                       | N/A                                | ARTS                             | \$ 4,000.     |
| FRIENDS OF GRACE CHURCH<br>SCHOOL<br>86 FOURTH AVENUE<br>NEW YORK, NY 10003       | N/A                       | N/A                                | EDUCATION                        | 500.          |
| STORM KING SCHOOL<br>314 MOUNTAIN ROAD<br>CORNWALL ON HUD, NY 12520,              | N/A                       | N/A                                | EDUCATION                        | 4,350.        |
| UNITED JEWISH APPEAL<br>130 EAST 59TH STREET<br>NEW YORK,, NY 10022               | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 10,000.       |
| NYU MEDICAL CENTER<br>550 FIRST AVENUE<br>NEW YORK NY,                            | N/A                       | N/A                                | HEALTH CARE                      | 4,350.        |
| KIDS OF NYU FDN<br>902 BROADWAY<br>NEW YORK, NY 10010                             | N/A                       | N/A                                | HEALTH CARE                      | 44,000.       |
| NARAL FOUNDATION<br>1156 15TH ST. NW, SUITE 700<br>WASHINGTON DC, 20005,          | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 1,500.        |
| AMERICAN RED CROSS<br>150 AMSTERDAM AVENUE<br>NEW YORK, NY 10023,                 | N/A                       | N/A                                | RESEARCH                         | 6,000.        |
| CHILDREN FOR CHILDREN<br>985 FIFTH AVENUE<br>NEW YORK,, NY 10021                  | N/A                       | N/A                                | EDUCATION                        | 400.          |
| WILLARD HOUSE AND CLOCK<br>MUSEUM<br>11 WILLARD STREET<br>GRAFTON, MA 01536-2011, | N/A                       | N/A                                | MUSEUMS                          | 1,000.        |
| ATLANTIC THEATRE COMPANY<br>336 WEST 20TH STREET<br>NEW YORK, NY 10011            | N/A                       | N/A                                | ARTS                             | 132,000.      |
| GREENWICH VILLAGE SOCIETY<br>232 EAST 11TH STREET<br>NEW YORK, NY 10003           | N/A                       | N/A                                | MUSEUMS                          | 1,600.        |

Client 1

WUNSCH FOUNDATION, INC.

11-6006013

**Statement 5 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

| <u>Name and Address</u>                                                                                      | <u>Donee Relationship</u> | <u>Found-<br/>ation<br/>Status</u> | <u>Purpose of<br/>Grant</u>      | <u>Amount</u> |
|--------------------------------------------------------------------------------------------------------------|---------------------------|------------------------------------|----------------------------------|---------------|
| THE GO PROJECT<br>86 FOURTH AVENUE<br>NEW YORK, NY 10003                                                     | N/A                       | N/A                                | EDUCATION                        | \$ 10,500.    |
| THE MUSEUM OF MODERN ART<br>11 WEST 53 STREET<br>NEW YORK, NY 10019                                          | N/A                       | N/A                                | ARTS                             | 5,800.        |
| THE RETREAT<br>13 GOODFRIEND DRIVE<br>EAST HAMPTON, NY 11937                                                 | N/A                       | N/A                                | ARTS                             | 500.          |
| UNITED NATIONS FOUNDATION<br>1800 MASSACHUSETTS AVE NW,<br>STE 400<br>SOCIAL ASSISTANCE/POVERTY,<br>DC 20036 | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 2,000.        |
| LEUKEMIA/LYMPHOMA<br>FOUNDATION<br>475 PARK AVENUE, 8TH FL<br>NEW YORK, NY 10016                             | N/A                       | N/A                                | HEALTH CARE                      | 2,000.        |
| CHAMPIONS OF CHOICE<br>18 HARRISON STREET<br>NEW YORK, NY 10013                                              | N/A                       | N/A                                | HEALTH                           | 500.          |
| CITY HARVEST<br>575 8TH AVENUE<br>NEW YORK, NY 10018                                                         | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 5,000.        |
| THE DOE FUND<br>232 EAST 84TH STREET<br>NEW YORK, NY 10028                                                   | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 2,000.        |
| EUGENE LANG COLLEGE<br>79 FIFTH AVENUE<br>NEW YORK, NY 10211                                                 | N/A                       | N/A                                | EDUCATION                        | 2,500.        |
| GODS LOVE WE DELIVER<br>166 AVE OF THE AMERICAS<br>NEW YORK, NY 10013                                        | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 1,000.        |
| GRACE CHURCH SCHOOL<br>86 FOURTH AVENUE<br>NEW YORK, NY 10003                                                | N/A                       | N/A                                | EDUCATION                        | 19,000.       |
| WHITNEY MUSEUM OF AMERICAN<br>ART<br>945 MADISON AVENUE<br>NEW YORK, NY 10021                                | N/A                       | N/A                                | ARTS                             | 2,000.        |

Client 1

WUNSCH FOUNDATION, INC.

11-6006013

**Statement 5 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

| <u>Name and Address</u>                                                                               | <u>Donee Relationship</u> | <u>Found-<br/>ation<br/>Status</u> | <u>Purpose of<br/>Grant</u>      | <u>Amount</u> |
|-------------------------------------------------------------------------------------------------------|---------------------------|------------------------------------|----------------------------------|---------------|
| THE ALUMNI HOUSE FUND<br>ASSOCIATION<br>1851 DOUGHERTY TERRACE<br>DRIVE<br>BALLWIN, MD 63021          | N/A                       | N/A                                | EDUCATION                        | \$ 1,000.     |
| ALZHEIMER'S ASSOCIATION<br>225 N. MICHIGAN AVE, FL 17<br>CHICAGO, IL 60601                            | N/A                       | N/A                                | HEALTH CARE                      | 5,000.        |
| AMERICAN TECHNION SOCIETY<br>55 EAST 59TH STREET<br>NEW YORK, NY 10022                                | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 20,000.       |
| FRIENDS OF THE HIGH LINE<br>529 WEST 20TH STREET, STE<br>8W<br>NEW YORK, NY                           | N/A                       | N/A                                | ARTS                             | 5,000.        |
| HELPING IS EASY<br>431 METROPOLITAN AVE, STE 3<br>BROOKLYN, NY 11211                                  | N/A                       | N/A                                | WELFARE                          | 250.          |
| HISTORIC HOUSE TRUST OF NEW<br>YORK CITY<br>830 5TH AVE, THE ARSENAL,<br>RM 203<br>NEW YORK, NY 10065 | N/A                       | N/A                                | ARTS                             | 1,300.        |
| NORTH SHORE ANIMAL LEAGUE<br>AMERICA<br>25 DAVIS AVE<br>PORT WASHINGTON, NY 11050                     | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 2,000.        |
| PHILOCTETES CENTER<br>247 EAST 82ND STREET, 3RD<br>FLOOR<br>NEW YORK, NY 10028                        | N/A                       | N/A                                | EDUCATION                        | 500.          |
| SPONTANEOUS CELEBRATIONS<br>45 DANFORTH STREET<br>JAMAICA PLAIN, MA 02130                             | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 2,500.        |
| THE JEFFERSON MARKET GARDEN<br>70 A GREENWICH AVE, PMB 372<br>NEW YORK, NY 10011                      | N/A                       | N/A                                | EDUCATION                        | 250.          |
| COMMUNITY ACCESS INC<br>2 WASHINGTON STREET, 9TH<br>FLOOR<br>NEW YORK, NY 10004                       | N/A                       | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | 2,000.        |

Client 1

WUNSCH FOUNDATION, INC.

11-6006013

Statement 5 (continued)  
Form 990-PF, Part XV, Line 3a  
Recipient Paid During the Year

| <u>Name and Address</u>                                                                 | <u>Donee<br/>Relationship</u> | <u>Found-<br/>ation<br/>Status</u> | <u>Purpose of<br/>Grant</u>      | <u>Amount</u>      |
|-----------------------------------------------------------------------------------------|-------------------------------|------------------------------------|----------------------------------|--------------------|
| THE FEDERATIONS OF NORTH<br>AMERICA, INC.<br>25 BROADWAY, RM 1700<br>NEW YORK, NY 10004 | N/A                           | N/A                                | SOCIAL<br>ASSISTANCE/POVER<br>TY | \$ 20,000.         |
| NETWORK FOR GOOD<br>7920 NORFOLK AVE, STE 520<br>BETHESDA, MD 20814                     | N/A                           | N/A                                | EDUCATION                        | 2,048.             |
| NEW MUSEUM<br>235 BOWERY<br>NEW YORK, NY 10002                                          | N/A                           | N/A                                | MUSEUMS                          | 1,413.             |
| THE JAMES BEARD FOUNDATION<br>167 WEST 12TH STREET<br>NEW YORK, NY 10011                | N/A                           | N/A                                | EDUCATION                        | 500.               |
| Total                                                                                   |                               |                                    |                                  | \$ <u>326,261.</u> |

WUNSCH FOUNDATION, INC

EIN# 11-6006013

FORM 990-PF PART II LINE 15

SCHEDULE OF ARTWORK AND ARTIFACTS ON LOAN

DECEMBER 31, 2009

| ITEM<br>NUMBER | DESCRIPTION                                               | Date<br>Acquired | COST              |
|----------------|-----------------------------------------------------------|------------------|-------------------|
| 1              | Glass Goblet Diamond Engraved with Arms of Delft          | 8/00             | 22,500            |
| 2              | Achaemenid Silver Phiale                                  | 12/00            | 35,000            |
| 3              | Clichy Blue and White Striped Glass Bowl, c.1840          | 10/01            | 2,250             |
| 4              | Byzantine Blue Glass Bracelet, 12th-13th Century A.D.     | 10/01            | 3,500             |
| 5              | Potsdam Glass Beaker Engraved of Esias Rosbach            | 2/02             | 5,400             |
| 6              | Silver Tankard by Adrian Bancker                          | 2/02             | 16,500            |
| 7              | Potsdam Cover Glass Goblet Wheel Engraved with Landscape  | 6/02             | 6,500             |
| 8              | Venetian Ribbed Glass Megelean of Boat Shaped Form        | 6/02             | 4,300             |
| 9              | Islamic Pale Yellow Glass Jar Squat Form                  | 6/02             | 3,500             |
| 10             | Rare Gilded and Enamelled Glass Humpen                    | 3/03             | 18,500            |
| 11             | Islamic Small Blue Glass Pot                              | 1/03             | 1,200             |
| 12             | Fine Enameled Glass Flask with a Pewter Lid               | 4/03             | 4,500             |
| 13             | Islamic Small Glass Jar with Zig-Zag Trails               | 4/03             | 6,200             |
| 14             | Two extremely Rare Islamic Glasses - Syrian region        | 8/03             | 6,000             |
| 15             | Venetian Opal Glass Megelein, c. 1700                     | 7/04             | 5,500             |
| 16             | Islamic Glass Inkwell of Rounded Form, c. 10-12th Century | 8/04             | 7,400             |
| 17             | Norwegian Glass Carafe of Cruciform Shape, c. 1760        | 8/04             | 4,000             |
| 18             | American Silver Bowl by John Targee, c. 1815              | 12/04            | 2,450             |
| 19             | American Silver Bowl by Gerardus Boyce, c. 1825           | 12/04            | 2,250             |
| 20             | American Silver Bowl by Gerardus Boyce, c. 1820           | 12/04            | 2,400             |
| 21             | Saxonian Cylindrical Transparent Glass Vessel, c. 1697    | 8/06             | 25,000            |
| 22             | Islamic Glass Bottle, c. 10th Century                     | 1/07             | 6,400             |
| 23             | Islamic Glass Dish Olive Green                            | 7/07             | 3,500             |
| 24             | Islamic Glass Jug Greent Tint                             | 7/07             | 2,500             |
|                |                                                           |                  | <u>\$ 197,250</u> |



| TYPE AND NAME OF SECURITY         | DATE<br>ACQUIRED | INVENTORY BEGINNING<br>OF PERIOD |         | PURCHASES   |                |               |                       | SALES OR OTHER<br>DISPOSITIONS |                  |               | DATE<br>SOLD | GAIN<br>(LOSS) |
|-----------------------------------|------------------|----------------------------------|---------|-------------|----------------|---------------|-----------------------|--------------------------------|------------------|---------------|--------------|----------------|
|                                   |                  | SHARES /<br>PRINCIPAL            | COST    | #<br>SHARES | COST/<br>SHARE | GROSS<br>COST | PREMIUM<br>(DISCOUNT) | #<br>SHARES                    | PRICE /<br>SHARE | GROSS<br>SALE |              |                |
| ALTRIA GROUP INC UNSOLICITED      | 05/21/09         |                                  |         | 2,000       |                | 33,642        |                       | 2,000                          |                  | 35,314        | 10/01/09     | 1,672          |
| AMER CAPITAL STRATEGIES LTD       | 01/27/09         |                                  |         | 4,000       |                | 15,917        |                       | 4,000                          |                  | 12,638        | 06/24/09     | (3,279)        |
| AMERICAN CAPITAL LTD UNSOLICITED  | 06/16/09         |                                  |         | 6,000       |                | 19,743        |                       | 6,000                          |                  | 18,956        | 06/24/09     | (787)          |
| AUTOLIV INC                       | 04/30/08         | 1,000                            | 50,395  |             |                |               |                       | 1,000                          |                  | 36,578        | 10/20/09     | (13,817)       |
| AUTOLIV INC                       | 06/30/08         | 1,000                            | 51,971  |             |                |               |                       | 1,000                          |                  | 17,143        | 01/27/09     | (34,828)       |
| BANK OF AMER CORP                 | 07/07/05         | 500                              | 22,496  |             |                |               |                       | 500                            |                  | 3,556         | 03/26/09     | (18,940)       |
| BANK OF AMER CORP                 | 01/31/08         | 500                              | 20,032  |             |                |               |                       | 500                            |                  | 8,445         | 10/01/09     | (11,587)       |
| BB&T CORP                         | 01/31/08         | 1,000                            | 30,035  |             |                |               |                       | 1,000                          |                  | 25,976        | 10/28/09     | (4,059)        |
| CAPITALSOURCE INC                 | 08/31/07         | 3,000                            | 55,643  |             |                |               |                       | 3,000                          |                  | 9,637         | 10/09/09     | (46,006)       |
| CAPITALSOURCE INC                 | 02/06/09         |                                  |         | 3,000       |                | 10,959        |                       | 3,000                          |                  | 11,715        | 10/09/09     | 756            |
| CITIGROUP INC                     | 01/31/08         | 1,000                            | 29,223  |             |                |               |                       | 1,000                          |                  | 2,975         | 01/27/09     | (26,248)       |
| PREFERRED PLUS TR SER CCR 1       | 04/27/04         | 2,200                            | 60,302  |             |                |               |                       | 2,200                          |                  | 48,327        | 10/01/09     | (11,975)       |
| TECO ENERGY INC UNSOLICITED       | 06/02/09         |                                  |         | 4,000       |                | 44,598        |                       | 4,000                          |                  | 56,860        | 10/28/09     | 12,262         |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 06/14/05         | 100,000                          | 50,150  |             |                |               |                       | 100,000                        |                  | 57,460        | 05/15/09     | 7,310          |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 06/17/05         | 100,000                          | 49,625  |             |                |               |                       | 100,000                        |                  | 57,460        | 05/15/09     | 7,835          |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 07/25/05         | 125,000                          | 63,125  |             |                |               |                       | 125,000                        |                  | 71,825        | 05/15/09     | 8,700          |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 10/25/05         | 155,000                          | 76,861  |             |                |               |                       | 155,000                        |                  | 89,062        | 05/15/09     | 12,201         |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 12/30/05         | 115,000                          | 56,781  |             |                |               |                       | 115,000                        |                  | 66,079        | 05/15/09     | 9,298          |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 01/12/06         | 140,000                          | 68,418  |             |                |               |                       | 140,000                        |                  | 80,443        | 05/15/09     | 12,025         |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 12/22/06         | 150,000                          | 76,800  |             |                |               |                       | 150,000                        |                  | 86,189        | 05/15/09     | 9,389          |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 03/31/07         | 255,000                          | 131,914 |             |                |               |                       | 255,000                        |                  | 146,522       | 05/15/09     | 14,608         |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 05/31/07         | 200,000                          | 104,248 |             |                |               |                       | 200,000                        |                  | 114,919       | 05/15/09     | 10,671         |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 06/29/07         | 200,000                          | 104,420 |             |                |               |                       | 200,000                        |                  | 114,919       | 05/15/09     | 10,499         |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 07/31/07         | 200,000                          | 104,500 |             |                |               |                       | 200,000                        |                  | 114,919       | 05/15/09     | 10,419         |
|                                   |                  |                                  |         |             |                |               |                       |                                |                  |               |              |                |

1,206,939

124,859

1,287,918

(43,880)

| TYPE AND NAME OF SECURITY |                                         | INVENTORY BEGINNING OF PERIOD |                    | PURCHASES |          |             |            |                    | SALES OR OTHER DISPOSITIONS |               |            | DATE SOLD | GAIN (LOSS) | INVENTORY END OF PERIOD |      |
|---------------------------|-----------------------------------------|-------------------------------|--------------------|-----------|----------|-------------|------------|--------------------|-----------------------------|---------------|------------|-----------|-------------|-------------------------|------|
|                           |                                         | ACQUIRED                      | SHARES / PRINCIPAL | COST      | # SHARES | COST/ SHARE | GROSS COST | PREMIUM / DISCOUNT | # SHARES                    | PRICE / SHARE | GROSS SALE |           |             | SHARES/ PRINCIPAL       | COST |
|                           | OKLAHOMA CITY ARPT 8.95% 10/1/2012      | 09/17/04                      | 25,000             | 27,000    |          |             |            |                    | 5,000                       | 5,000         | 100/109    | 20,000    | 22,000      | 20,102                  |      |
|                           | ALABAMA ST UNIV 8.5% 1/1/2022           | 07/31/07                      | 25,000             | 28,250    |          |             |            |                    |                             |               |            | 25,000    | 28,250      | 28,432                  |      |
|                           | SAN DIEGO CALIF PUB FACS FING           | 08/30/08                      |                    |           | 100,000  |             | 94,844     |                    |                             |               |            | 100,000   | 94,844      | 94,702                  |      |
|                           | STATE OF CALIFORNIA VARIOUS             | 08/23/08                      |                    |           | 100,000  |             | 93,500     |                    |                             |               |            | 100,000   | 93,500      | 97,801                  |      |
|                           | FNMA 4.5% 8/30/2018                     | 05/31/07                      | 68,000             | 67,063    |          |             |            | 68,000             |                             | 67,063        | 04/02/09   | -         | -           | -                       |      |
|                           | FNR 93152K 8% 4/25/21                   | 05/19/87                      | 25,000             | -         |          |             |            |                    |                             |               |            | 25,000    | -           | 4,199                   |      |
|                           | FNR 83-253H 0% 11/25/23                 | 09/04/08                      | 10,000             | -         |          |             |            |                    |                             |               |            |           | -           | 3,663                   |      |
|                           | FNR82-148P2 8% 8/25/22                  | 08/28/88                      | 15,000             | -         |          |             |            |                    |                             |               |            |           | -           | 2,968                   |      |
|                           | FNMA 91-28.8% 4/25/21                   | 08/30/83                      | 10,000             | 313       |          |             |            |                    |                             | 59            | varies     | 10,000    | 254         | 231                     |      |
|                           | FNMA 91-29H 8% 4/25/21                  | 12/30/83                      | 25,000             | 271       |          |             |            |                    |                             | 101           | varies     | 25,000    | 170         | 50                      |      |
|                           | FNMA 1984-8CLMA 0% 11/25/23             | 01/28/84                      | 100,000            | 246       |          |             |            |                    |                             | 246           | varies     | 100,000   | -           | 4,445                   |      |
|                           | GNR 2003-62 5% 7/20/2033                | 08/09/03                      | 100,000            | 90,380    |          |             |            |                    |                             |               |            | 100,000   | 90,380      | 98,562                  |      |
|                           | FORD MTR 7.87% 8/15/2010                | 08/16/02                      | 75,000             | 74,235    |          |             |            |                    |                             |               |            | 75,000    | 74,235      | 76,133                  |      |
|                           | FORD MTR 5.2% 3/21/2011                 | 12/31/07                      | 45,000             | 38,154    |          |             |            |                    |                             |               |            | 45,000    | 38,154      | 43,427                  |      |
|                           | FORD MTR 5.25% 3/21/2011                | 08/31/07                      | 75,000             | 65,153    |          |             |            |                    |                             |               |            | 75,000    | 65,153      | 72,421                  |      |
|                           | ALCOA INC 6.5% 8/1/2011                 | 03/31/09                      |                    |           | 50,000   |             | 46,500     |                    |                             |               |            | 50,000    | 46,500      | 52,723                  |      |
|                           | FORD MTR 8.2% 6/20/2011                 | 07/31/07                      | 100,000            | 92,130    |          |             |            |                    |                             |               |            | 100,000   | 92,130      | 96,964                  |      |
|                           | INTL TEL & TEL 7.5% 7/1/2011            | 04/27/04                      | 100,000            | 100,250   |          |             |            |                    |                             |               |            | 100,000   | 100,250     | 100,282                 |      |
|                           | FORD MTR 5.5% 10/20/2011                | 07/31/07                      | 50,000             | 44,173    |          |             |            |                    |                             |               |            | 50,000    | 44,173      | 47,542                  |      |
|                           | FORD MTR 7.25% 10/25/2011               | 08/23/04                      | 100,000            | 106,880   |          |             |            |                    |                             |               |            | 100,000   | 106,880     | 100,989                 |      |
|                           | ALCOA INC 6.0% 1/15/2012                |                               |                    |           | 50,000   |             | 48,000     |                    |                             |               |            | 50,000    | 48,000      | 52,552                  |      |
|                           | WAMU INC SR NOTES 5% 2/3/12             | 03/30/08                      | 50,000             | 45,575    |          |             |            |                    |                             |               |            | 50,000    | 45,575      | 48,000                  |      |
|                           | WESTERN FINAN BANKS 8.625% 5/15/2012    | 08/29/07                      | 100,000            | 107,778   |          |             |            | 100,000            |                             | 107,778       | 06/05/09   | -         | -           | -                       |      |
|                           | GMAC SMARTNOTE 7.125% 8/15/2012         | 12/31/07                      | 50,000             | 43,355    |          |             |            |                    |                             |               |            | 50,000    | 43,355      | 43,383                  |      |
|                           | ASTORIA FINANCIAL CORP 5.75% 10/15/2012 | 08/05/09                      |                    |           | 100,000  |             | 92,162     |                    |                             |               |            | 100,000   | 92,162      | 93,275                  |      |

WUNSCH FOUNDATION, INC.  
EIN 11-8008013  
YEAR ENDED DECEMBER 31, 2008  
SCHEDULE OF INVESTMENT SECURITIES

| TYPE AND NAME OF SECURITY             | DATE ACQUIRED | INVENTORY BEGINNING OF PERIOD | PURCHASES |              |            |                    | SALES OR OTHER DISPOSITIONS |               |            | DATE SOLD | GAIN (LOSS) | INVENTORY END OF PERIOD |         |              |
|---------------------------------------|---------------|-------------------------------|-----------|--------------|------------|--------------------|-----------------------------|---------------|------------|-----------|-------------|-------------------------|---------|--------------|
|                                       |               | SHARES / PRINCIPAL            | # SHARES  | COST / SHARE | GROSS COST | PREMIUM / DISCOUNT | # SHARES                    | PRICE / SHARE | GROSS SALE |           |             | SHARES / PRINCIPAL      | COST    | MARKET VALUE |
| GMAC SMARTNOTE 7 5% 10/15/2012        | 04/25/07      | 75,000                        |           |              | 74,783     |                    |                             |               |            |           |             | 75,000                  | 74,783  | 65,304       |
| GMAC SMARTNOTE 7 875% 11/15/2012      | 12/31/07      | 65,000                        |           |              | 55,913     |                    |                             |               |            |           |             | 65,000                  | 55,913  | 56,882       |
| FORD MTR 8 75% 10/21/2013             | 08/31/07      | 77,000                        |           |              | 65,065     |                    |                             |               |            |           |             | 77,000                  | 65,065  | 72,154       |
| FORD MTR 8 05% 2/20/2014              | 05/31/08      | 21,000                        |           |              | 16,216     |                    |                             |               |            |           |             | 21,000                  | 16,216  | 18,803       |
| FORD MTR 6 05% 4/21/2014              | 09/30/07      | 57,000                        |           |              | 45,069     |                    |                             |               |            |           |             | 57,000                  | 45,069  | 50,850       |
| CBS CORP NEW                          | 08/23/08      |                               | 100,000   |              |            |                    |                             |               | 103,372    |           |             | 100,000                 | 103,372 | 113,682      |
| WACHOVIA CORP 5 25% 8/1/2014          | 09/03/08      | 100,000                       |           |              | 85,382     |                    |                             |               |            |           |             | 100,000                 | 85,382  | 103,526      |
| WILLIAM WRIGLEY JR CO 4 65% 7/15/2015 | 08/31/08      | 100,000                       |           |              | 86,500     |                    |                             |               |            |           |             | 100,000                 | 86,500  | 98,375       |
| THE DOW CHEMICAL CO NTS               | 05/29/09      |                               | 100,000   |              |            |                    |                             |               | 100,000    |           |             | 100,000                 | 100,000 | 101,186      |
| CAPITAL ONE FIN CORP @ 6 15% 8/1/16   | 01/31/08      | 40,000                        |           |              | 36,287     |                    |                             |               |            |           |             | 40,000                  | 36,287  | 40,181       |
| GMAC SMARTNOTE 7 5% 11/15/2016        | 08/20/08      | 50,000                        |           |              | 49,400     |                    |                             |               |            |           |             | 50,000                  | 49,400  | 39,757       |
| GMAC SMARTNOTE 7 5% 11/15/2016        | 03/31/07      | 75,000                        |           |              | 74,783     |                    |                             |               |            |           |             | 75,000                  | 74,783  | 59,635       |
| GMAC SMARTNOTE 7 5% 11/15/2016        | 05/31/07      | 100,000                       |           |              | 99,550     |                    |                             |               |            |           |             | 100,000                 | 99,550  | 79,513       |
| GMAC SMARTNOTE 7 25% 9/15/2017        | 04/25/07      | 99,000                        |           |              | 97,268     |                    |                             |               |            |           |             | 99,000                  | 97,268  | 72,412       |
| GMAC SMARTNOTE MTN 8% 10/15/2017      | 09/29/06      | 68,000                        |           |              | 67,815     |                    |                             |               |            |           |             | 68,000                  | 67,815  | 52,013       |
| GMAC SMARTNOTE MTN 7 75% 10/15/2017   | 10/12/06      | 49,000                        |           |              | 48,755     |                    |                             |               |            |           |             | 49,000                  | 48,755  | 36,878       |
| GMAC SMARTNOTE MTN 7 75% 10/15/2017   | 07/31/07      | 75,000                        |           |              | 73,875     |                    |                             |               |            |           |             | 75,000                  | 73,875  | 56,446       |
| GMAC SMARTNOTE MTN 8% 11/15/2017      | 07/27/04      | 85,000                        |           |              | 92,100     |                    |                             |               |            |           |             | 85,000                  | 92,100  | 65,024       |
| GMAC SMARTNOTE MTN 8% 11/15/2017      | 02/11/05      | 75,000                        |           |              | 78,998     |                    |                             |               |            |           |             | 75,000                  | 78,998  | 57,374       |
| GMAC SMARTNOTE MTN 8% 11/15/2017      | 03/31/07      | 100,000                       |           |              | 99,950     |                    |                             |               |            |           |             | 100,000                 | 99,950  | 76,499       |
| GMAC SMARTNOTE MTN 8% 11/15/2017      | 08/31/07      | 100,000                       |           |              | 91,614     |                    |                             |               |            |           |             | 100,000                 | 91,614  | 76,499       |
| GMAC SMARTNOTE MTN 8 125% 11/15/2017  | 10/15/04      | 15,000                        |           |              | 16,243     |                    |                             |               |            |           |             | 15,000                  | 16,243  | 11,517       |
| GMAC SMARTNOTE 7 5% 11/15/2017        | 10/24/06      | 30,000                        |           |              | 29,888     |                    |                             |               |            |           |             | 30,000                  | 29,888  | 22,109       |
| GMAC SMARTNOTE 7 3% 01/15/2018        | 01/05/05      | 25,000                        |           |              | 25,755     |                    |                             |               |            |           |             | 25,000                  | 25,755  | 18,040       |
| AMERENENERGY GENERATING               | 06/09/08      |                               | 50,000    |              |            |                    |                             |               | 45,247     |           |             | 50,000                  | 45,247  | 51,823       |

| TYPE AND NAME OF SECURITY               | DATE<br>ACQUIRED | INVENTORY BEGINNING<br>OF PERIOD |         | PURCHASES   |                 |               |                       | SALES OR OTHER<br>DISPOSITIONS |                  |               | DATE<br>SOLD | GAIN<br>(LOSS) | INVENTORY END OF PERIOD |         |                 |
|-----------------------------------------|------------------|----------------------------------|---------|-------------|-----------------|---------------|-----------------------|--------------------------------|------------------|---------------|--------------|----------------|-------------------------|---------|-----------------|
|                                         |                  | SHARES /<br>PRINCIPAL            | COST    | #<br>SHARES | COST /<br>SHARE | GROSS<br>COST | PREMIUM<br>(DISCOUNT) | #<br>SHARES                    | PRICE /<br>SHARE | GROSS<br>SALE |              |                | SHARES/<br>PRINCIPAL    | COST    | MARKET<br>VALUE |
| UBS AG STAMFORD CT                      | 06/02/09         |                                  |         | 100,000     |                 | 90,800        |                       |                                |                  |               |              |                | 100,000                 | 90,800  | 101,801         |
| GEN ELEC CAP 5% 5/9/2018                | 05/28/06         | 50,000                           | 49,275  |             |                 |               |                       |                                |                  |               |              |                | 50,000                  | 49,275  | 50,746          |
| GMAC SMARTNOTE 7% 8/15/2018             | 08/23/04         | 100,000                          | 102,819 |             |                 |               |                       |                                |                  |               |              |                | 100,000                 | 102,819 | 70,630          |
| LEHMAN BROS HLDGS 4% 4/18/2019          | 07/11/06         | 45,000                           | 43,088  |             |                 |               |                       |                                |                  |               |              |                | 45,000                  | 43,088  | 6,975           |
| LEHMAN BROS HLDGS 4% 4/18/2019          | 01/31/07         | 100,000                          | 87,700  |             |                 |               |                       |                                |                  |               |              |                | 100,000                 | 87,700  | 15,500          |
| LEHMAN BROS HLDGS 4% 4/18/2019          | 03/31/07         | 35,000                           | 34,274  |             |                 |               |                       |                                |                  |               |              |                | 35,000                  | 34,274  | 5,425           |
| DOW CHEMICAL CO NTS                     | 06/03/09         |                                  |         | 10,000      |                 | 9,965         |                       |                                |                  |               |              |                | 10,000                  | 9,965   | 11,931          |
| CBS CORP NEW B/E                        | 06/03/09         |                                  |         | 100,000     |                 | 100,225       |                       |                                |                  |               |              |                | 100,000                 | 100,225 | 119,632         |
| DEERE & CO 8.95% 8/15/2019              | 08/28/06         | 75,000                           | 82,125  |             |                 |               |                       | 75,000                         |                  | 82,125        | 06/15/09     |                | -                       | -       | -               |
| DEERE & CO 8.95% 8/15/2019              | 08/15/06         | 50,000                           | 54,750  |             |                 |               |                       | 50,000                         |                  | 54,750        | 06/15/09     |                | -                       | -       | -               |
| ALTRIA GROUP INC                        | 05/29/09         |                                  |         | 100,000     |                 | 109,500       |                       |                                |                  |               |              |                | 100,000                 | 109,500 | 121,863         |
| FORD MOTOR 9.375% 3/1/2020              | 04/28/04         | 42,000                           | 48,797  |             |                 |               |                       |                                |                  |               |              |                | 42,000                  | 48,797  | 39,585          |
| GENRL MOTORS CORP 8.8% 3/1/2021         | 03/10/05         | 29,000                           | 29,757  |             |                 |               |                       |                                |                  |               |              |                | 29,000                  | 29,757  | 7,612           |
| FORD MOTOR 9.215% 9/15/2021             | 04/26/04         | 15,000                           | 17,005  |             |                 |               |                       |                                |                  |               |              |                | 15,000                  | 17,005  | 13,950          |
| FORD MOTOR 9.215% 9/15/2021             | 06/21/04         | 50,000                           | 56,725  |             |                 |               |                       |                                |                  |               |              |                | 50,000                  | 56,725  | 46,500          |
| FORD MOTOR 9.215% 9/15/2021             | 08/23/04         | 50,000                           | 56,573  |             |                 |               |                       |                                |                  |               |              |                | 50,000                  | 56,573  | 46,500          |
| TOLEDO OHIO G/O MULT 7% 12/1/2022       | 07/31/07         | 100,000                          | 103,345 |             |                 |               |                       | 100,000                        |                  | 103,345       | 02/09/09     |                | -                       | -       | -               |
| CHESAPEAKE & POTOMAC TEL 7.15% 5/1/2023 | 05/09/06         | 100,000                          | 101,127 |             |                 |               |                       |                                |                  |               |              |                | 100,000                 | 101,127 | 101,747         |
| GENERAL MOTORS CORP 8.25% 7/15/2023     | 08/25/03         | 100,000                          | 100,873 |             |                 |               |                       |                                |                  |               |              |                | 100,000                 | 100,873 | 26,500          |
| GENERAL MOTORS CORP 8.25% 7/15/2023     | 08/23/04         | 200,000                          | 209,855 |             |                 |               |                       |                                |                  |               |              |                | 200,000                 | 209,855 | 53,000          |
| GENERAL MOTORS CORP 8.25% 7/15/2023     | 08/22/04         | 60,000                           | 64,877  |             |                 |               |                       |                                |                  |               |              |                | 60,000                  | 64,877  | 15,900          |
| GENERAL MOTORS CORP 8.25% 7/15/2023     | 11/09/04         | 40,000                           | 42,271  |             |                 |               |                       |                                |                  |               |              |                | 40,000                  | 42,271  | 10,600          |
| CNA FIN CORP 7.25% 11/15/2023           | 01/14/04         | 100,000                          | 102,755 |             |                 |               |                       |                                |                  |               |              |                | 100,000                 | 102,755 | 94,102          |
| CNA FIN CORP 7.25% 11/15/2023           | 04/30/08         | 50,000                           | 49,375  |             |                 |               |                       |                                |                  |               |              |                | 50,000                  | 49,375  | 47,051          |
| GENL MOTORS CORP 8.1% 8/15/2024         | 02/11/04         | 100,000                          | 110,005 |             |                 |               |                       |                                |                  |               |              |                | 100,000                 | 110,005 | 26,000          |

## WUNSCH FOUNDATION, INC

EIN 11-6006013

YEAR ENDED DECEMBER 31, 2009

## SCHEDULE OF INVESTMENT SECURITIES

| TYPE AND NAME OF SECURITY                        | DATE<br>ACQUIRED | INVENTORY BEGINNING<br>OF PERIOD<br>SHARES /<br>PRINCIPAL | PURCHASES   |                |               |                       |             | SALES OR OTHER<br>DISPOSITIONS |               |                      | DATE<br>SOLD | GAIN<br>(LOSS) | INVENTORY END OF PERIOD |                 |         |
|--------------------------------------------------|------------------|-----------------------------------------------------------|-------------|----------------|---------------|-----------------------|-------------|--------------------------------|---------------|----------------------|--------------|----------------|-------------------------|-----------------|---------|
|                                                  |                  |                                                           | #<br>SHARES | COST/<br>SHARE | GROSS<br>COST | PREMIUM<br>(DISCOUNT) | #<br>SHARES | PRICE /<br>SHARE               | GROSS<br>SALE | SHARES/<br>PRINCIPAL |              |                | COST                    | MARKET<br>VALUE |         |
| GENL MOTORS CORP 8 1% 8/15/2024                  | 11/12/04         | 50,000                                                    |             |                | 53,005        |                       |             |                                |               |                      |              |                | 50,000                  | 53,005          | 13,000  |
| GENL MOTORS CORP 8 1% 8/15/2024                  | 12/06/04         | 100,000                                                   |             |                | 105,805       |                       |             |                                |               |                      |              |                | 100,000                 | 105,805         | 26,000  |
| SWISS BANK CORP 7 5% 7/15/2025                   | 02/27/09         |                                                           | 108,000     |                |               | 95,069                |             |                                |               |                      |              |                | 108,000                 | 95,069          | 107,908 |
| MBNA CAPITAL I SER A 8 278% 12/1/2028            | 01/11/06         | 30,000                                                    |             |                | 32,168        |                       |             |                                |               |                      |              |                | 30,000                  | 32,168          | 28,950  |
| MBNA CAPITAL I SER A 8 278% 12/1/2028            | 01/27/06         | 60,000                                                    |             |                | 64,267        |                       |             |                                |               |                      |              |                | 60,000                  | 64,267          | 57,900  |
| MBNA CAPITAL I SER A 8 278% 12/1/2028            | 06/30/08         | 50,000                                                    |             |                | 51,325        |                       |             |                                |               |                      |              |                | 50,000                  | 51,325          | 48,250  |
| BANK OF AMER 8% 12/15/2028                       | 03/14/06         | 100,000                                                   |             |                | 106,424       |                       |             |                                |               |                      |              |                | 100,000                 | 106,424         | 98,000  |
| DOMINION CAP TR GTD B/E 7 83% 12/1/27            | 11/05/09         |                                                           | 107,000     |                |               | 109,675               |             |                                |               |                      |              |                | 107,000                 | 109,675         | 107,182 |
| GTE NORTH INC 8 73% 2/15/2028                    | 05/16/06         | 54,000                                                    |             |                | 51,661        |                       |             |                                |               |                      |              |                | 54,000                  | 51,661          | 51,759  |
| GENL MOTORS CORP 8 75% 5/1/2028                  | 03/17/05         | 50,000                                                    |             |                | 43,533        |                       |             |                                |               |                      |              |                | 50,000                  | 43,533          | 12,750  |
| DES MOINES, IOWA AVIATION 6 95% 7/1/2028         | 07/31/07         | 60,000                                                    |             |                | 60,501        |                       |             |                                |               |                      |              |                | 60,000                  | 60,501          | 56,784  |
| FORD MOTOR 6 62% 10/1/28                         | 09/26/01         | 60,000                                                    |             |                | 51,817        |                       |             |                                |               |                      |              |                | 60,000                  | 51,817          | 46,350  |
| FORD HOLDINGS INC 9 3% 3/1/2030                  | 05/24/04         | 25,000                                                    |             |                | 27,748        |                       |             |                                |               |                      |              |                | 25,000                  | 27,748          | 23,000  |
| FORD HOLDINGS INC 9 3% 3/1/2030                  | 03/14/05         | 55,000                                                    |             |                | 60,863        |                       |             |                                |               |                      |              |                | 55,000                  | 60,863          | 50,600  |
| NEW YORK TELEPHONE CO 7% 12/1/2033               | 02/27/09         |                                                           | 15,000      |                |               | 13,363                |             |                                |               |                      |              |                | 15,000                  | 13,363          | 14,914  |
| GENERAL ELECTRIC CAPITAL COPR 8 75%<br>3/15/2032 | 07/08/08         |                                                           | 100,000     |                |               | 92,448                |             |                                |               |                      |              |                | 100,000                 | 92,448          | 101,956 |
| GOLDMAN SACHS CAPITAL I 6 345% 2/15/2034         | 07/06/08         |                                                           | 100,000     |                |               | 82,700                |             |                                |               |                      |              |                | 100,000                 | 82,700          | 93,626  |
| LOEWS CORP 6% 2/1/2035                           | 04/28/09         |                                                           | 50,000      |                |               | 39,150                |             |                                |               |                      |              |                | 50,000                  | 39,150          | 47,877  |
| JP MORGAN CHASE CAP XVIII 6 95% 8/17/2036        | 09/22/08         |                                                           | 15,000      |                |               | 14,269                |             |                                |               |                      |              |                | 15,000                  | 14,269          | 14,573  |
| ESTEE LAUDER COS INC 6% 5/15/2037                | 02/27/08         |                                                           | 50,000      |                |               | 38,768                |             |                                |               |                      |              |                | 50,000                  | 38,768          | 48,240  |
| DOMINION RES INC VA NEW ENH JR 8 375%<br>8/15/64 | 06/17/09         |                                                           | 4,000       |                |               | 100,000               |             | 4,000                          |               | 100,000              |              |                | -                       | -               | -       |
| AEGON FUNDING CORP 7 25%                         | 09/30/07         | 4,000                                                     |             |                | 100,000       |                       |             |                                |               |                      |              |                | 4,000                   | 100,000         | 79,160  |
| ALLIANZ SE                                       | 06/30/08         | 1,500                                                     |             |                | 37,500        |                       |             |                                |               |                      |              |                | 1,500                   | 37,500          | 36,938  |
| ALTRIA GROUP INC UNSOLICITED                     | 05/21/09         |                                                           | 2,000       |                |               | 33,642                |             | 2,000                          |               | 35,314               | 10/01/09     | 1,672          | -                       | -               | -       |
| AMER CAPITAL STRATEGIES LTD                      | 12/10/04         | 2,298                                                     |             |                | 62,449        |                       |             |                                |               |                      |              |                | 2,298                   | 62,449          | 5,607   |

| TYPE AND NAME OF SECURITY                                   | DATE<br>ACQUIRED | INVENTORY BEGINNING<br>OF PERIOD |        | PURCHASES   |                 |               | SALES OR OTHER<br>DISPOSITIONS |             |                  | DATE<br>SOLD | GAIN<br>(LOSS) | INVENTORY END OF PERIOD |        |                 |
|-------------------------------------------------------------|------------------|----------------------------------|--------|-------------|-----------------|---------------|--------------------------------|-------------|------------------|--------------|----------------|-------------------------|--------|-----------------|
|                                                             |                  | SHARES /<br>PRINCIPAL            | COST   | #<br>SHARES | COST /<br>SHARE | GROSS<br>COST | PREMIUM<br>(DISCOUNT)          | #<br>SHARES | PRICE /<br>SHARE |              |                | SHARES /<br>PRINCIPAL   | COST   | MARKET<br>VALUE |
| AMER CAPITAL STRATEGIES LTD                                 | 04/25/07         | 2,194                            | 97,645 |             |                 |               |                                |             |                  |              |                | 2,194                   | 97,645 | 5,353           |
| AMER CAPITAL STRATEGIES LTD                                 | 01/27/09         |                                  |        | 4,000       |                 | 15,917        |                                | 4,000       |                  | 06/24/09     | (3,279)        | -                       | -      | -               |
| AMERICAN CAPITAL LTD UNSOLICITED                            | 06/19/09         |                                  |        | 10,000      |                 | 32,905        |                                | 6,000       |                  | 06/24/09     | (787)          | 4,000                   | 13,162 | 9,760           |
| AMERICAN CAPITAL LTD OPTIONAL DIVIDEND                      | 08/07/09         |                                  |        | 6,145       |                 | 19,786        |                                |             |                  |              |                | 6,145                   | 19,786 | 14,994          |
| AUTOLIV INC                                                 | 04/30/08         | 1,000                            | 50,395 |             |                 |               |                                | 1,000       |                  | 10/20/09     | (13,817)       | -                       | -      | -               |
| AUTOLIV INC                                                 | 08/30/08         | 1,000                            | 51,971 |             |                 |               |                                | 1,000       |                  | 01/27/09     | (34,828)       | -                       | -      | -               |
| BAC CAP TR II 7% 02 7% 2/1/2032                             | 01/31/02         | 2,000                            | 50,000 |             |                 |               |                                |             |                  |              |                | 2,000                   | 50,000 | 44,500          |
| BANK OF AMER CORP                                           | 07/07/05         | 500                              | 22,498 |             |                 |               |                                | 500         |                  | 03/26/09     | (18,940)       | -                       | -      | -               |
| BANK OF AMER CORP (Exchange from Merrill Lynch in Jan 2009) | 03/31/07         | 859                              | 77,601 |             |                 |               |                                |             |                  |              |                | 859                     | 77,601 | 12,937          |
| BANK OF AMER CORP                                           | 01/31/08         | 1,500                            | 60,095 |             |                 |               |                                | 500         |                  | 10/01/09     | (11,587)       | 1,000                   | 40,063 | 15,060          |
| BANK OF AMER CORP                                           | 01/29/09         |                                  |        | 1,000       |                 | 5,783         |                                |             |                  |              |                | 1,000                   | 5,793  | 15,060          |
| BB&T CORP                                                   | 01/24/05         | 1,000                            | 39,545 |             |                 |               |                                |             |                  |              |                |                         |        |                 |
| BB&T CORP                                                   | 01/31/08         | 1,000                            | 30,035 |             |                 |               |                                | 1,000       |                  | 10/28/09     | (4,059)        | -                       | -      | -               |
| BB&T CORP                                                   | 04/30/09         | 1,000                            | 32,783 |             |                 |               |                                |             |                  |              |                | 1,000                   | 32,783 | 25,370          |
| BEAR STERNS C/73 7 8% 5/15/31                               |                  | 3,000                            | 75,000 |             |                 |               |                                | 3,000       |                  |              |                | -                       | -      | -               |
| CAPITALSOURCE INC                                           | 08/31/07         | 3,000                            | 55,643 |             |                 |               |                                | 3,000       |                  | 10/09/09     | (46,006)       | -                       | -      | -               |
| CAPITALSOURCE INC                                           | 02/06/09         |                                  |        | 3,000       |                 | 10,959        |                                | 3,000       |                  | 10/09/09     | 756            | -                       | -      | -               |
| CITIGROUP INC                                               | 01/31/08         | 1,000                            | 29,223 |             |                 |               |                                | 1,000       |                  | 01/27/09     | (26,248)       | -                       | -      | -               |
| CITIGROUP INC                                               | 01/31/08         | 14,615                           | 50,000 |             |                 |               |                                |             |                  |              |                | 14,615                  | 50,000 | 48,376          |
| CONSECO INC SER A (WARRANTS)                                | 09/10/03         | 309                              | -      |             |                 |               |                                |             |                  |              |                | 309                     | -      | -               |
| DEUTSCHE BANK 6 825%                                        | 07/31/07         | 3,000                            | 75,000 |             |                 |               |                                |             |                  |              |                | 3,000                   | 75,000 | 62,970          |
| ENERPLUS RESOURCES                                          | 04/25/07         | 1,000                            | 42,413 |             |                 |               |                                |             |                  |              |                | 1,000                   | 42,413 | 22,960          |
| ENERPLUS RESOURCES                                          | 08/31/07         | 1,000                            | 40,775 |             |                 |               |                                |             |                  |              |                | 1,000                   | 40,775 | 22,960          |
| EVERGREEN ASSET                                             | 04/25/07         | 4,949                            | 87,951 | 208         |                 | 2,575         |                                |             |                  |              |                | 5,157                   | 70,526 | 56,930          |
| FORD MOTOR Q3 7 6% 3/1/2032                                 | 02/27/02         | 3,000                            | 75,000 |             |                 |               |                                |             |                  |              |                | 3,000                   | 75,000 | 62,859          |

WUNSCH FOUNDATION, INC.  
EIN 11-8006013  
YEAR ENDED DECEMBER 31, 2009  
SCHEDULE OF INVESTMENT SECURITIES

| TYPE AND NAME OF SECURITY         | DATE<br>ACQUIRED | INVENTORY BEGINNING<br>OF PERIOD |         | PURCHASES   |                 |               | SALES OR OTHER<br>DISPOSITIONS |             |                  | DATE<br>SOLD | GAIN<br>(LOSS) | INVENTORY END OF PERIOD |         |                 |
|-----------------------------------|------------------|----------------------------------|---------|-------------|-----------------|---------------|--------------------------------|-------------|------------------|--------------|----------------|-------------------------|---------|-----------------|
|                                   |                  | SHARES /<br>PRINCIPAL            | COST    | #<br>SHARES | COST /<br>SHARE | GROSS<br>COST | PREMIUM<br>DISCOUNT            | #<br>SHARES | PRICE /<br>SHARE |              |                | SHARES /<br>PRINCIPAL   | COST    | MARKET<br>VALUE |
| GLAXO SMITHKLINE PLC ADR          | 11/20/06         | 1,000                            | 52,005  |             |                 |               |                                |             |                  |              |                | 1,000                   | 52,005  | 42,250          |
| GOLDMAN SACHS GROUP INC           | 09/20/07         | 2,500                            | 59,882  |             |                 |               |                                |             |                  |              |                | 2,500                   | 59,882  | 63,100          |
| HANA BIOSCIENCES (DONATED BY PW)  | 03/07/08         | 6,000                            | 24,555  |             |                 |               |                                |             |                  |              |                | 6,000                   | 24,555  | 1,140           |
| INDYMAC BANCORP                   | 01/31/08         | 3,000                            | 20,800  |             |                 |               |                                |             |                  |              |                | 3,000                   | 20,800  | 102             |
| ING GROEP N V 6 2% PF             | 10/28/03         | 4,000                            | 100,000 |             |                 |               |                                |             |                  |              |                | 4,000                   | 100,000 | 67,480          |
| ING GROEP N V 6 375% 8/15/2012 PF | 08/29/07         | 2,000                            | 50,000  |             |                 |               |                                |             |                  |              |                | 2,000                   | 50,000  | 33,960          |
| JP MORGAN CHASE 6 25% PF          | 10/03/03         | 2,000                            | 50,000  |             |                 |               |                                |             |                  |              |                | 2,000                   | 50,000  | 47,860          |
| MERRILL LYNCH PFD CAPITAL         | 01/16/98         | 2,000                            | 50,000  |             |                 |               |                                |             |                  |              |                | 2,000                   | 50,000  | 41,100          |
| MORGAN STANLEY 8 8% 10/15/2066    | 10/12/06         | 4,000                            | 100,000 |             |                 |               |                                |             |                  |              |                | 4,000                   | 100,000 | 87,760          |
| PENN WEST ENERGY TRUST            | 08/31/07         | 2,000                            | 57,701  |             |                 |               |                                |             |                  |              |                | 2,000                   | 57,701  | 35,200          |
| PENN WEST ENERGY TRUST            | 09/25/09         |                                  |         | 2,000       |                 | 29,481        |                                |             |                  |              |                | 2,000                   | 29,481  | 35,200          |
| PFIZER INC                        | 01/31/07         | 2,500                            | 65,805  |             |                 |               |                                |             |                  |              |                | 2,500                   | 65,805  | 45,475          |
| PFIZER INC                        | 08/30/08         | 2,000                            | 35,701  |             |                 |               |                                |             |                  |              |                | 2,000                   | 35,701  | 36,380          |
| PHOENIX 7 45% 1/15/32             | 12/27/01         | 4,000                            | 100,000 |             |                 |               |                                |             |                  |              |                | 4,000                   | 100,000 | 73,800          |
| PREFERRED PLUS TR SER CCR 1       | 04/27/04         | 2,200                            | 60,302  |             |                 |               |                                | 2,200       |                  | 10/01/09     | (11,974)       | -                       | -       | -               |
| RENAISSANCE HOLDINGS              | 03/31/07         | 1,000                            | 52,996  |             |                 |               |                                |             |                  |              |                | 1,000                   | 52,996  | 53,150          |
| ROYAL BANK OF SCOTLAND 6 25%      | 12/31/10         | 3,000                            | 75,000  |             |                 |               |                                |             |                  |              |                | 3,000                   | 75,000  | 30,660          |
| ROYAL BANK OF SCOTLAND 7 25%      | 09/30/07         | 3,000                            | 75,000  |             |                 |               |                                |             |                  |              |                | 3,000                   | 75,000  | 35,670          |
| TOTAL S A FRANCE SPON ADR         | 07/13/08         |                                  |         | 2,000       |                 | 100,601       |                                |             |                  |              |                | 2,000                   | 100,601 | 128,080         |
| TECO ENERGY INC UNSOLICITED       | 08/02/09         |                                  |         | 4,000       |                 | 44,598        |                                | 4,000       |                  | 10/28/09     | 12,262         | -                       | -       | -               |
| UBS AG PFD FNDG TR IV             | 05/23/03         | 4,000                            | 100,000 |             |                 |               |                                |             |                  |              |                | 4,000                   | 100,000 | 60,000          |
| VERIZON COMMUNICATIONS INC        | 10/02/08         |                                  |         | 1,000       |                 | 30,204        |                                |             |                  |              |                | 1,000                   | 30,204  | 33,130          |
| VERIZON COMMUNICATIONS INC        | 10/20/08         |                                  |         | 2,000       |                 | 58,201        |                                |             |                  |              |                | 2,000                   | 58,201  | 66,260          |
| VERIZON COMMUNICATIONS INC        | 10/28/09         |                                  |         | 2,000       |                 | 57,863        |                                |             |                  |              |                | 2,000                   | 57,863  | 66,260          |
| STUDENT LN MKTG ASSN 0% 5/15/2014 | 06/14/05         | 100,000                          | 50,150  |             |                 |               |                                | 100,000     |                  | 05/15/09     | 7,310          | -                       | -       | -               |

|           |           |           |          |                  |                  |
|-----------|-----------|-----------|----------|------------------|------------------|
| 8,262,897 | 1,962,062 | 1,911,008 | (43,880) | 8,270,190        | 7,170,001        |
| <hr/>     |           |           |          |                  |                  |
|           |           |           |          | <u>COST</u>      | <u>FMV</u>       |
|           |           |           |          | 5,608,292        | 4,760,506        |
|           |           |           |          | 385,961          | 758,315          |
|           |           |           |          | <u>2,275,937</u> | <u>1,651,180</u> |
|           |           |           |          |                  |                  |
|           |           |           |          | 8,270,190        | 7,170,001        |

|            |  |
|------------|--|
| BONDS - CC |  |
| BONDS - ZC |  |
| STOCKS     |  |
| TOTAL      |  |



**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

Department of the Treasury  
Internal Revenue Service► **File a separate application for each return.**

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

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns*

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

|                                                                                           |                                                                                         |                                |
|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------|
| <b>Type or print</b><br><br>File by the due date for filing your return. See instructions | Name of Exempt Organization                                                             | Employer identification number |
|                                                                                           | WUNSCH FOUNDATION, INC.                                                                 | 11-6006013                     |
|                                                                                           | Number, street, and room or suite number. If a P.O. box, see instructions               |                                |
|                                                                                           | 902 BROADWAY, SUITE 1603                                                                |                                |
|                                                                                           | City, town or post office, state, and ZIP code. For a foreign address, see instructions |                                |
|                                                                                           | NEW YORK, NY 10010                                                                      |                                |

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

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

- The books are in the care of ► WUNSCH FOUNDATION, INC.

Telephone No ► \_\_\_\_\_ FAX No ► \_\_\_\_\_

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

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15, 2010, to file the exempt organization return for the organization named above.

The extension is for the organization's return for

- ☒ calendar year 2009 or
- ☐ tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions

3a \$ 4,146.

b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit

3b \$ 12,047.

c **Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions

3c \$ 0.

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

**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev 4-2009)

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

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

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

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

|                                                                                            |                                                                                         |                                |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------|
| Type or print<br><br>File by the extended due date for filing the return. See instructions | Name of Exempt Organization                                                             | Employer identification number |
|                                                                                            | WUNSCH FOUNDATION, INC.                                                                 | 11-6006013                     |
|                                                                                            | Number, street, and room or suite number. If a P.O. box, see instructions               | For IRS use only               |
|                                                                                            | Dinowitz & Bove, CPAs<br>150 Broadway RM 1105                                           |                                |
|                                                                                            | City, town or post office, state, and ZIP code. For a foreign address, see instructions |                                |
|                                                                                            | New York, NY 10038                                                                      |                                |

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

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

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

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

- 4 I request an additional 3-month extension of time until 11/15, 20 10
- 5 For calendar year 2009, or other tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_
- 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 ALL INFORMATION NEEDED TO COMPLETE FORM 990 IS NOT YET AVAILABLE.

|                                                                                                                                                                                                                                           |              |         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|---------|
| <b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions                                                                                 | <b>8a</b> \$ | 4,146.  |
| <b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868 | <b>8b</b> \$ | 12,047. |
| <b>c Balance Due.</b> 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 instrs                    | <b>8c</b> \$ | 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 \_\_\_\_\_ Date \_\_\_\_\_