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### Form **990-PF**

### **Return of Private Foundation**

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

Department of the Treasury Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements Internal Revenue Service

OMB No 1545-0052 2009

For calendar year 2009, or tax year beginning and ending G Check all that apply initial return Final return Initial return of a former public charity Amended return Address change Name change Name of foundation A Employer identification number Use the IRS lahel THE KING FAMILY CHARITABLE TRUST 11-6450731 Otherwise. print Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number or type. 500 OLD COUNTRY ROAD SUITE 304 (516)741-3434 See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions GARDEN CITY NY 11530 D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation Section 501(c)(3) exempt private foundation H Check type of organization X Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation E If private foundation status was terminated I Fair market value of all assets at end of year | J Accounting method Accrual under section 507(b)(1)(A), check here (from Part II, col. (c), line 16) Other (specify) If the foundation is in a 60-month termination 1,993. (Part I, column (d) must be on cash basis.) **▶**\$ under section 507(b)(1)(B), check here Part | Analysis of Revenue and Expenses (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for chantable purposes (cash basis only) expenses per books income income 20,000 N/A Contributions, gifts, grants, etc., received 2 Check ▶ if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments  $\overline{14}$ 14 STATEMENT Dividends and interest from securities 5a Gross rents CANNED MAY 1 9 2010
Revenue ) Net rental income or (loss) 62 Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 0 7 Capital gain net Income (from Part IV, line 2) Net short-term capital gain Income modifications b Less Cost of goods sold c Gross profit or (loss) 11 Other income 20,014 14 Total. Add lines 1 through 11 0. О. Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits Expenses 16a Legal fees STMT 2 3,500 350 150 b Accounting fees RECEIVED c Other professional fees Operating and Administrative 17 Interest 18 Taxes 17 19 Depreciation and depletion 20 Occupancy OGDEN 21 Travel, conferences, and meetings 22 Printing and publications STMT 3 25 0 25. 23 Other expenses 24 Total operating and administrative 3,525 350 expenses. Add lines 13 through 23 3,175. 19,955 25 Contributions, gifts, grants paid 19,955. 26 Total expenses and disbursements. Add lines 24 and 25 23,480. 350 23,130. 27 Subtract line 26 from line 12 <3,466. 2 Excess of revenue over expenses and disbursements 0 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-) LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

| Part   Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only | Beginning of year  | End of                                | year                                      |
|---|--------------------|---------------------------------------|---|
| Part B Solution Street's column should be for end-of-year amounts only  | (a) Book Value     | (b) Book Value                        | (c) Fair Market Value                     |
| 1 Cash - non-interest-bearing   |                    |                                       |   |
| 2 Savings and temporary cash investments  | 5,459.             | 1,993.                                | 1,993                                     |
| 3 Accounts receivable ►   |                    |                                       |   |
| Less. allowance for doubtful accounts   |                    |                                       |   |
| 4 Pledges receivable -  |                    |                                       |   |
| Less allowance for doubtful accounts  |                    |                                       |   |
| 5 Grants receivable   |                    |                                       |   |
| 6 Receivables due from officers, directors, trustees, and other   |                    |                                       |   |
| disqualified persons  |                    |                                       |   |
| 7 Other notes and loans receivable  |                    |                                       | <del></del>                               |
| Less allowance for doubtful accounts  | Ì                  | 1                                     |   |
| 8 Inventories for sale or use   |                    |                                       |   |
| 9 Prepaid expenses and deferred charges   |                    |                                       |   |
| 10a Investments - U S and state government obligations  |                    |                                       |   |
| b Investments - corporate stock   |                    |                                       | <del></del>                               |
| c Investments - corporate bonds   |                    |                                       |   |
| 11 Investments - land, buildings, and equipment basis   |                    |                                       | wannan an a |
| Less accumulated deprecation  | İ                  | İ                                     |   |
| 12 Investments - mortgage loans   |                    | · · · · · · · · · · · · · · · · · · · |   |
| 13 Investments - other  |                    |                                       |   |
| 14 Land, buildings, and equipment basis   |                    |                                       |   |
| Less accumulated depreciation   |                    | 1                                     |   |
|   |                    |                                       |   |
| 15 Other assets (describe ►)  |                    | <del></del>                           |   |
| 46. Total access (As he consisted by all files)   | 5,459.             | 1,993.                                | 1 002                                     |
| 16 Total assets (to be completed by all filers)   | 3,437.             | 1,993.                                | 1,993                                     |
| 17 Accounts payable and accrued expenses  |                    |                                       |   |
| 18 Grants payable   |                    |                                       |   |
| 19 Deferred revenue   |                    |                                       |   |
| 20 Loans from officers, directors, trustees, and other disqualified persons   |                    |                                       |   |
| 21 Mortgages and other notes payable  |                    |                                       |   |
| 22 Other liabilities (describe >)   |                    |                                       |   |
|   |                    | .                                     |   |
| 23 Total liabilities (add lines 17 through 22)  | 0.                 | 0.                                    |   |
| Foundations that follow SFAS 117, check here  |                    |                                       |   |
| and complete lines 24 through 26 and lines 30 and 31.   |                    |                                       |   |
| 24 Unrestricted .   |                    |                                       |   |
| 25 Temporarily restricted   |                    |                                       |   |
| 26 Permanently restricted   |                    |                                       |   |
| Foundations that do not follow SFAS 117, check here   |                    |                                       |   |
| and complete lines 27 through 31.   |                    | ĺ                                     |   |
| 27 Capital stock, trust principal, or current funds   | 0.                 | 0.                                    |   |
| 28 Paid-in or capital surplus, or land, bldg , and equipment fund   | 0.                 | 0.                                    |   |
| 29 Retained earnings, accumulated income, endowment, or other funds .   | 5,459.             | 1,993.                                |   |
| 30 Total net assets or fund balances  | 5,459.             | 1,993.                                |   |
|   |                    |                                       |   |
| 31 Total liabilities and net assets/fund balances   | 5,459.             | 1,993.                                |   |
| art III Analysis of Changes in Net Assets or Fund Ba  | alances            | · · · · · · · · · · · · · · · · · · · |   |
| art iii Allalysis of Ollaliges iii Net Assets of Fulld Ba   |                    |                                       |   |
| Total net assets or fund balances at beginning of year - Part II, column (a), line 3                                  | 30                 |                                       |   |
| (must agree with end-of-year figure reported on prior year's return)  |                    | 1                                     | 5,459                                     |
| Enter amount from Part I, line 27a  |                    | 2                                     | <3,466                                    |
| Other increases not included in line 2 (itemize)  |                    | 3                                     | 0   |
| Add lines 1, 2, and 3   |                    | 4                                     | 1,993                                     |
| Decreases not included in line 2 (itemize)  | • • • •            | 5                                     | 0   |
| Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, co                                  | tumn (h) line 30   | . 6                                   | 1,993                                     |
|   | <u>107, mio 00</u> | . 101                                 | Form <b>990-PF</b> (2009                  |

| b NON  |  | g , real estate,<br>hs. MLC Co )            |                                    | (b) Ho<br>P -<br>D - | w acquired<br>Purchase<br>Donation | (c)<br>(n | Date acquired<br>no , day, yr.)         | (d) Date sold<br>(mo , day, yr )  |
|--|--|---|------------------------------------|----------------------|------------------------------------|-----------|---|---|
| C  |  |   |                                    | ļ                    |                                    | <u> </u>  |   | L   |
|  | E  |   |                                    |                      |                                    | -         |   |   |
|  |  |   |                                    | ļ <u>.</u>           |                                    | -         |   |   |
| 8  |  |   | ·                                  |                      |                                    |           |   |   |
| (e) Gross sales price  | (f) Depreciation allowed<br>(or allowable)   | 197   | t or other basis<br>xpense of sale |                      |                                    |           | (n) Gain or (ioss<br>) plus (f) minus ( |   |
| a  |  |   |                                    |                      |                                    |           |   |   |
| b  |  | <del></del>                                 | <del></del>                        |                      |                                    |           |   |   |
| 6  |  | +   | <u></u>                            |                      |                                    |           | <del></del>                             | <del>-</del>  |
| <u>d</u>   |  | <del></del>                                 |                                    |                      |                                    |           |   |   |
| Complete only for assets showing   | gain in column (h) and owned by  | v the foundation                            | on 12/31/69                        |                      |                                    | (I) Gai   | ns (Col. (h) gain                       | minus   |
|  | (j) Adjusted basis   |   | cess of col (i)                    |                      |                                    | col (k).  | but not less that                       | n -0-) ar   |
| (i) FMV as of 12/31/69   | as of 12/31/69   |   | col (j), if any                    |                      |                                    | Lo        | sses (from col (                        | h))   |
| a  |  |   |                                    |                      |                                    |           |   |   |
| b  |  |   |                                    |                      |                                    |           |   |   |
| С  |  |   |                                    |                      |                                    |           |   |   |
| <u>d</u>   |  |   |                                    |                      |                                    |           | <del></del>                             |   |
| 8  |  |   |                                    | <del>.  </del>       |                                    |           |   |   |
| Capital gain net income or (net capi   | tal loss) { If gain, also ent  | er in Part I, line i<br>-0- in Part I, line | 7<br>7                             | }                    | 2                                  |           |   |   |
| Net short-term capital gain or (loss)  |  | and (6)                                     |                                    |                      |                                    |           |   |   |
| If gain, also enter in Part I, line 8, co  | olumn (c)  |   |                                    |                      |                                    |           |   |   |
| If (loss), enter -0- in Part I, line 8  Part V Qualification Un  | der Section 4940(a) fo   | r Peduced                                   | Tay on Not                         | Invo                 | stmont I                           | ncon      |   | <del></del>   |
| For optional use by domestic private for<br>f section 4940(d)(2) applies, leave this<br>Was the foundation liable for the section<br>f "Yes," the foundation does not qualify  | s part blank<br>on 4942 tax on the distributable a<br>y under section 4940(e) Do not c             | imount of any ye                            | ear in the base pei                | 10 <b>d</b> ?        |                                    |           |   | Yes X No  |
| 1 Enter the appropriate amount in each   | ch column for each year, see inst  | tructions before                            | making any entri                   | es                   |                                    |           |   |   |
| (a)<br>Base period years<br>Calendar year (or tax year beginning   | (b)<br>Adjusted qualifying d   |   | Net value of no                    | (c)<br>ncharit       |                                    |           |   | (d)<br>oution ratio<br>rided by col (c))  |
| 2008   |  | 25,008.                                     |                                    |                      | 12,70                              | 8.        |   | 1.967894  |
| 2007   |  | 24,755.                                     | <del></del>                        |                      | 38,30                              |           |   |   |
| 2006   |  | 21,275.<br>10,266.                          |                                    |                      |                                    | - T       |   |   |
| 2005   |  | 10.4200.4                                   |                                    |                      | 22,01                              |           |   | .966299   |
| 0004   | į ,  |   |                                    | _                    | 19,94                              | 19.       |   | .966299<br>.514612  |
| 2004   |  | 20,725.                                     |                                    |                      |                                    | 19.       |   | .966299<br>.514612  |
|  |  |   |                                    |                      | 19,94                              | 19.       | 2                                       | .966299<br>.514612<br>5.165753  |
| ? Total of line 1, column (d)  |  | 20,725.                                     | or by the number                   | of year              | 19,94                              | 19.       | 2                                       | .966299<br>.514612<br>5.165753  |
| ? Total of line 1, column (d)  | year base period – divide the tota   | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       | 2 3                                     | .966299<br>.514612<br>5.165753<br>9.260835  |
| Total of line 1, column (d)     Average distribution ratio for the 5-y   | year base period – divide the tota   | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       |   | .966299<br>.514612<br>5.165753<br>9.260835<br>1.852167  |
| Protal of line 1, column (d)  Average distribution ratio for the 5-the foundation has been in existence  | year base period - divide the tota<br>se if less than 5 years                                      | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       |   | .966299<br>.514612<br>5.165753<br>9.260835<br>1.852167  |
| Protal of line 1, column (d)  Average distribution ratio for the 5-the foundation has been in existence  Enter the net value of noncharitable  | year base period - divide the tota<br>se if less than 5 years                                      | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       | 3                                       | .966299<br>.514612<br>5.165753<br>9.260835<br>1.852167  |
| Total of line 1, column (d) Average distribution ratio for the 5-the foundation has been in existence Enter the net value of noncharitable   | year base period - divide the tota<br>se if less than 5 years                                      | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       | 3                                       | .966299<br>.514612<br>5.165753<br>9.260835<br>1.852167  |
| <ul> <li>Total of line 1, column (d)</li> <li>Average distribution ratio for the 5-y</li> <li>the foundation has been in existence</li> <li>Enter the net value of noncharitable</li> <li>Multiply line 4 by line 3</li> </ul>                                 | year base period - divide the tota<br>e if less than 5 years<br>i-use assets for 2009 from Part X  | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       | 3                                       | .966299<br>.514612<br>5.165753<br>9.260835<br>1.852167<br>10,134.                             |
| Total of line 1, column (d)     Average distribution ratio for the 5-y   | year base period - divide the tota<br>e if less than 5 years<br>i-use assets for 2009 from Part X  | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       | 3 4 5                                   | .966299<br>.514612<br>5.165753<br>9.260835<br>1.852167<br>10,134.<br>18,770.                  |
| <ul> <li>Total of line 1, column (d)</li> <li>Average distribution ratio for the 5-the foundation has been in existence</li> <li>Enter the net value of noncharitable</li> <li>Multiply line 4 by line 3</li> <li>Enter 1% of net investment income</li> </ul> | year base period - divide the tota<br>re if less than 5 years<br>r-use assets for 2009 from Part X | 20,725.                                     | or by the number                   | of yea               | 19,94                              | 19.       | 3<br>4<br>5<br>6                        | .646277<br>.966299<br>.514612<br>5.165753<br>9.260835<br>1.852167<br>10,134.<br>18,770.<br>0. |

| Form | 990-PF (2009) THE KING FAMILY CHARITABLE TRUST 11-645  |               |          | Page 4     |
|------|--|---------------|----------|------------|
| Pa   | rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see  | instru        | ictio    | ns)        |
| 1a   | Exempt operating foundations described in section 4940(d)(2), check here   and enter "N/A" on line 1   |               |          |            |
|      | Date of ruling or determination letter (attach copy of letter if necessary-see instructions)   |               |          |            |
| b    | Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1%   |               |          | 0.         |
|      | of Part I, line 27b  |               |          |            |
| C    | All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)   |               |          |            |
| 2    | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)   |               | -        | 0.         |
| 3    | Add lines 1 and 2 3  |               |          | 0.         |
| 4    | Subtitle A (Income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  |               |          | 0.         |
| 5    | Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-   |               |          | 0.         |
| 6    | Credits/Payments   |               |          |            |
| а    | 2009 estimated tax payments and 2008 overpayment credited to 2009 6a 135.  |               |          |            |
| b    | Exempt foreign organizations - tax withheld at source  |               |          |            |
| C    | Tax paid with application for extension of time to file (Form 8868)  |               |          |            |
| d    | Backup withholding erroneously withheld . 6d   |               |          |            |
| 7    | Total credits and payments. Add lines 6a through 6d 7  |               | 1        | <u>35.</u> |
| 8    | Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached 8   |               |          |            |
|      | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  |               |          |            |
| 10   | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  |               | 1        | 35.        |
|      | Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ 135 • Refunded ▶ 11  |               |          | 0.         |
|      | rt VII-A Statements Regarding Activities   | _ <del></del> |          |            |
| 1a   | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in   |               | Yes      | No         |
|      | any political campaign?  | <u>1</u> a    |          | X          |
| b    | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?   | 1b            | ļ        | 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.   |               |          |            |
|      | Did the foundation file Form 1120-POL for this year?   | 10            |          | X          |
| a    | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:   | j             |          |            |
| _    | (1) On the foundation $\blacktriangleright$ \$ 0.  |               |          |            |
| 8    | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ 0 •   |               |          |            |
| •    |  |               |          | v          |
| 2    | Has the foundation engaged in any activities that have not previously been reported to the IRS?  | 2             | <u> </u> | X          |
| 2    | If "Yes," attach a detailed description of the activities.   |               |          |            |
| J    | 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 |               |          | v          |
| 12   | Did the foundation have unrelated business gross income of \$1,000 or more during the year?  | 3             |          | X          |
|      | If "Yes," has it filed a tax return on Form 990-T for this year?  N/A  | 4a            | <u> </u> |            |
|      | Was there a liquidation, termination, dissolution, or substantial contraction during the year?   | 4b 5          | -        | Х          |
| ·    | If "Yes," attach the statement required by General Instruction T.  |               |          |            |
| 6    | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either   |               |          |            |
|      | By language in the governing instrument, or  |               |          |            |
|      | By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law   | İ             |          |            |
|      | remain in the governing instrument?  | 6             | х        |            |
| 7    | Did the foundation have at least \$5,000 in assets at any time during the year?  | 7             | X        |            |
|      | If "Yes," complete Part II, col. (c), and Part XV.   | <del></del>   |          |            |
| 8a   | Enter the states to which the foundation reports or with which it is registered (see instructions)   |               |          |            |
| -    | 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  | 8b            | х        |            |
| 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   | 9             |          | Х          |
| 10   | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses   | 10            |          | X          |

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,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form 4720, to determine if the foundation had excess business holdings in 2009.)

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

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X

3b

4a

Yes X No

N/A

during the year?

| Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)   | n Managers, Highly     |                  |
|---|------------------------|------------------|
| 3 Five highest-paid independent contractors for professional services. If none, enter "No   | ONE."                  |                  |
| (a) Name and address of each person paid more than \$50,000   | (b) Type of service    | (c) Compensation |
| NONE  |                        |                  |
|   |                        |                  |
|   |                        |                  |
|   |                        |                  |
|   |                        |                  |
|   |                        |                  |
|   |                        | -                |
|   |                        |                  |
|   |                        |                  |
|   |                        |                  |
| Total number of others receiving over \$50,000 for professional services  |                        | ▶ 0              |
| Part IX-A Summary of Direct Charitable Activities   |                        |                  |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical in number of organizations and other beneficiaries served, conferences convened, research papers produced | nformation such as the | Expenses         |
| 1 N/A   | ,                      |                  |
|   |                        |                  |
|   |                        |                  |
| 2   |                        |                  |
| <u> </u>  |                        |                  |
|   |                        |                  |
| 3   |                        | <del></del>      |
|   |                        |                  |
|   |                        |                  |
| 4   |                        | *                |
|   |                        |                  |
|   |                        |                  |
| Part IX-B Summary of Program-Related Investments  |                        | · · · · · ·      |
| 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   |                        |                  |
|   |                        |                  |
|   |                        |                  |
| Total. Add lines 1 through 3  | <b>&gt;</b>            | 0.               |

| Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:  a Average monthly fair market value of securities  b Average of monthly cash balances  c Fair market value of all other assets  d Total (add lines 1a, b, and c)  e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  2 0.  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  Part XI  Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here  and on one of 2009 from Part V, line 5  b Income tax for 2009 (This does not include the tax from Part V). line 5  c Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  A Recoveries of amounts treated as qualifying distributions  4 0.  5 Add lines 3 and 4  C Beduction from distributable amount (see instructions)  Fart XII  Qualifying Distributions (see instructions)   |
|--|
| a Average monthly fair market value of securities b Average of monthly cash balances c Fair market value of all other assets d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 2 0 3 Subtract line 2 from line 1d 4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 154 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 6 Molinium investment return. Enter 5% of line 5  Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 10, 134 6 Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(i))(3) and (i))(5) private operating foundations and certain foreign organizations check here and on to complete this part.)  1 Minimum investment return from Part X, line 6 1 507 2a Tax on investment income for 2009 from Part VI, line 5 2a 1 b Income tax for 2009 (This does not include the tax from Part VI) c Add lines 2a and 2b 6 Distributable amount before adjustments. Subtract line 2c from line 1 7 Acd lines 3 and 4 7 Recoveres of amounts treated as qualifying distributions 7 Distributable amount (see instructions) 7 Distributable amount (see instructions) 8 Deduction from distributable amount (see instructions) 9 Distributable amount (see instructions) 9 Distributable amount sadjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 9 Total (add lines 3 and 4 9 Deduction from distributable amount (see instructions) 9 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 9 Total (add lines 3 and 4 9 Deduction from distributable amount (see instructions) 9 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 9 Total (add lines 3 lines 3 lines 3 lines 3 lines 3 lines 3 lines 3  |
| b Average of monthly cash balances c Fair market value of all other assets d Total (add lines 1a, b, and c) c Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 2 Acquisition indebtedness applicable to line 1 assets 2 0 3 Subtract line 2 from line 1d 4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 Minimum investment return. Enter 5% of line 5 6 507  Part XI Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here ball and do not complete this part.)  1 Minimum investment return from Part X, line 6 1 507 2a Tax on investment income for 2009 from Part VI, line 5 b Income tax for 2009 (This does not include the tax from Part VI) c Add lines 2 and 2b 2 C 0 3 Distributable amount before adjustments. Subtract line 2c from line 1 3 507 4 Recoveries of amounts treated as qualifying distributions 4 0 5 Add lines 3 and 4 5 507 6 Deduction from distributable amount (see instructions) 6 0 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507   |
| t Fair market value of all other assets  d Total (add lines 1a, b, and c)  e Reduction claimed for blockage or other factors reported on lines 1a and  1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  2 0  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  6 507  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.)  Minimum investment return from Part X, line 6  2a Tax on investment income for 2009 from Part VI, line 5  b Income tax for 2009 (This does not include the tax from Part VI)  c Add lines 2a and 2b  3 Distributable amount before adjustments. Subtract line 2c from line 1  3 507  4 Recoveries of amounts treated as qualifying distributions  4 Go Distributable amount (see instructions)  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  6 0  7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 507  |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  Fart XI  Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here and on the complete this part.)  1 Minimum investment return from Part X, line 6 2 Tax on investment income for 2009 from Part VI, line 5 2 Income tax for 2009 (This does not include the tax from Part VI) 2 Income tax for 2009 (This does not include the tax from Part VI) 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 2 and 4 6 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507   |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  2 0  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  Minimum investment return. Enter 5% of line 5  Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here in and do not complete this part.)  Minimum investment return from Part X, line 6  2 Tax on investment income for 2009 from Part VI, line 5  b Income tax for 2009 (This does not include the tax from Part VI)  c Add lines 2a and 2b  3 Distributable amount before adjustments. Subtract line 2 c from line 1  4 Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 507  |
| 1c (attach detailed explanation)  2 Acquisition indebtedness applicable to line 1 assets  3 Subtract line 2 from line 1d  4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  6 Minimum investment return. Enter 5% of line 5  Part XI  Distributable Amount (see instructions) (Section 4942(i))(3) and (i))(5) private operating foundations and certain foreign organizations check here and on the complete this part.)  1 Minimum investment return from Part X, line 6  2 Tax on investment income for 2009 from Part VI, line 5  b Income tax for 2009 (This does not include the tax from Part VI)  c Add lines 2a and 2b  3 Distributable amount before adjustments. Subtract line 2c from line 1  4 Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 507  |
| 2 00 3 Subtract line 2 from line 1d 4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 6 Minimum investment return. Enter 5% of line 5 6 507    Part XI  |
| 4 154 5 Net value of noncharitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 6 Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here ▶ and do not complete this part.)  1 Minimum investment return from Part X, line 6 2a Tax on investment income for 2009 from Part VI, line 5 b Income tax for 2009 (This does not include the tax from Part VI) c Add lines 2a and 2b 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507  |
| 4 154  Net value of noncharitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  Minimum investment return. Enter 5% of line 5  Distributable Amount (see instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here  and do not complete this part.)  Minimum investment return from Part X, line 6  Tax on investment income for 2009 from Part VI, line 5  Income tax for 2009 (This does not include the tax from Part VI)  C Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  Recoveries of amounts treated as qualifying distributions  Add lines 3 and 4  Deduction from distributable amount (see instructions)  Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  To 154  10, 134  |
| Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4  Minimum investment return. Enter 5% of line 5  Part XI Distributable Amount (see instructions) (Section 4942(i))(3) and (j)(5) private operating foundations and certain foreign organizations check here  and do not complete this part.)  Minimum investment return from Part X, line 6  Tax on investment income for 2009 from Part VI, line 5  Income tax for 2009 (This does not include the tax from Part VI)  C Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  Recoveries of amounts treated as qualifying distributions  Add lines 3 and 4  Deduction from distributable amount (see instructions)  Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  To 10, 134  10, 13, 14  10, 134  10, 134  10, 134  10, 134  10, 134  10, 134  10, 13, 14  10, 134  10, 134  10, 134  10, 13, 14    |
| Minimum investment return. Enter 5% of line 5   6   507   Part XI   Distributable Amount (see instructions) (Section 4942(i))(3) and (i)(5) private operating foundations and certain foreign organizations check here   |
| Part XI Distributable Amount (see Instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here ▶ □ and do not complete this part.)  1 Minimum investment return from Part X, line 6 □ 1 □ 50.7  2a Tax on investment income for 2009 from Part VI, line 5 □ 2a □ □ □  b Income tax for 2009 (This does not include the tax from Part VI) □ 2b □ □  c Add lines 2a and 2b □ 2c □ 0  3 Distributable amount before adjustments. Subtract line 2c from line 1 □ 3 □ 50.7  4 Recoveries of amounts treated as qualifying distributions □ 4 □ 0  5 Add lines 3 and 4 □ 5 □ 50.7  6 Deduction from distributable amount (see instructions) □ 6 □ 0  7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 □ 7 □ 50.7  |
| 2a Tax on investment income for 2009 from Part VI, line 5 b Income tax for 2009 (This does not include the tax from Part VI) c Add lines 2a and 2b 2c 3 Distributable amount before adjustments. Subtract line 2c from line 1 3 507 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 5 5 507 6 Deduction from distributable amount (see instructions) 6 0 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507   |
| b Income tax for 2009 (This does not include the tax from Part VI)  c Add lines 2a and 2b  2c  0  3 Distributable amount before adjustments. Subtract line 2c from line 1  3 507  4 Recoveries of amounts treated as qualifying distributions  5 Add lines 3 and 4  5 507  6 Deduction from distributable amount (see instructions)  7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 507  |
| Add lines 2a and 2b  Distributable amount before adjustments. Subtract line 2c from line 1  Recoveries of amounts treated as qualifying distributions  Add lines 3 and 4  Deduction from distributable amount (see instructions)  Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  2c  0  5 07  5 07  6 00  7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  7 507   |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1 4 Recoveries of amounts treated as qualifying distributions 5 Add lines 3 and 4 5 5 507 6 Deduction from distributable amount (see instructions) 6 0 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507   |
| Add lines 3 and 4  Deduction from distributable amount (see instructions)  Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1  Description of the second of the secon |
| 5 Add lines 3 and 4 5 5 507 6 Deduction from distributable amount (see instructions) 6 0 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507   |
| 6 Deduction from distributable amount (see instructions) 6 0 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507   |
| 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 507  |
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|  |
| 1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes  |
| a Expenses, contributions, gifts, etc total from Part I, column (d), line 26  b Program-related investments - total from Part IX-B  10  11  23,130   |
| b Program-related investments - total from Part IX-B   |
| 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  2   |
| 3 Amounts set aside for specific charitable projects that satisfy the  |
|  |
| a Suitability test (prior IRS approval required)  b Cash distribution test (attach the required schedule)  3b  |
| 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 23, 130   |
| 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment   |
| income Enter 1% of Part I, line 27b  |
| 02 120   |
| Adjusted qualifying distributions. Subtract line 5 from line 4  Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section   |
| 4940(e) reduction of tax in those years  |

## Part XIII Undistributed Income (see Instructions)

|   |                                       | (a)<br>Corpus                           | (b)<br>Years prior to 2008                 | (c)<br>2008                              | (d)<br>2009  |
|---|---------------------------------------|---|--|--|--|
| 1 Distributable amount for  | r 2009 from Part XI                   |   | 10010 pilot to 2000                        | 2000                                     | 2003   |
| line 7  | 2000 1101111 111 (XII,                |   |  |  | 507.   |
| 2 Undistributed income, if any  | as of the end of 2009                 |   | HITT-HITTHIT', ', I,,H  ,                  |  |  |
| a Enter amount for 2008 of  |                                       |   |  | 0.                                       |  |
| h Total for prior years   |                                       | *************************************** | ######################################     |  | <del></del>  |
| ,   |                                       |   | 0.   |  |  |
| 3 Excess distributions car  | ryover, if any, to 2009               |   |  | 1 - 81 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - | **************************************                                     |
| a From 2004   | 20,524.                               | į                                       |  |  |  |
| <b>b</b> From 2005  | 9,269.                                | 1                                       |  |  |  |
| c From 2006   | 20,174.                               |   |  |  |  |
| d From 2007   | 22,840.                               |   |  |  |  |
| e From 2008   | 24,373.                               | 1                                       |  |  |  |
| f Total of lines 3a through   | n e                                   | 97,180.                                 |  |  |  |
| 4 Qualifying distributions t  | for 2009 from                         |   |  |  | ***************************************                                    |
| Part XII, line 4. ▶ \$  | 23,130.                               |   |  |  |  |
| a Applied to 2008, but not  | more than line 2a                     |   |  | 0.                                       |  |
| b Applied to undistributed  | income of prior                       |   | <u>, , , , , , , , , , , , , , , , , ,</u> |  | , 17 <sup>111</sup> ,1 ,7 <sup>11</sup> 1111111111111111111111111111111111 |
| years (Election required  | - see instructions)                   |   | 0.   |  |  |
| c Treated as distributions  | out of corpus                         |   | 0 1 ·                                      | ······································   | 11'''  |
| (Election required - see i  | 1                                     | 0.                                      |  |  |  |
| d Applied to 2009 distribu  | table amount                          | · · · · · · · · · · · · · · · · · · ·   | '11,*11.4' · ''11.1' ·                     | **************************************   | 507.   |
| e Remaining amount distr  | ibuted out of corpus                  | 22,623.                                 |  |  |  |
| 5 Excess distributions carryove (If an amount appears in columnust be shown in column (a) | ımın (d), the same amount             | 0.                                      |  |  | 0.   |
| 6 Enter the net total of ea indicated below:  |                                       |   |  |  | ,  |
|   | 4.4- 8                                | 119,803.                                | ·  |  |  |
| 2 Corpus Add lines 3f, 4c, and  |                                       | 119,003.                                |  |  |  |
| b Prior years' undistribute   | u iliculie subtract                   |   | 0.   |  |  |
| c Enter the amount of prio  | .r.v.o.aro,                           |   |  |  |  |
| undistributed income for  |                                       |   |  |  |  |
| deficiency has been issu  | ed, or on which                       |   |  |  |  |
| the section 4942(a) tax it assessed   | has been previously                   |   | 0.   |  |  |
| d Subtract line 6c from line  | a 6h Tavahla                          |   |  |  | ······································                                     |
| amount - see instruction  |                                       |   | 0.   |  |  |
| e Undistributed income for  | ·                                     |   |  |  | ······································                                     |
| 4a from line 2a Taxable   | 1                                     |   |  | 0.                                       |  |
| f Undistributed income for  | <del> </del>                          |   | ***************************************    |  |  |
| lines 4d and 5 from line  |                                       |   |  |  |  |
| be distributed in 2010  |                                       |   |  |  | 0.   |
| 7 Amounts treated as distr  | ributions out of                      |   | 1'1 1111111 11 1 1 1 1                     | ·· ·· · · · · · · · · · · · · · · · ·    |  |
| corpus to satisfy require   |                                       |   |  |  |  |
| section 170(b)(1)(F) or 4   | · · · · · · · · · · · · · · · · · · · | 0.                                      |  |  |  |
| 8 Excess distributions carr   |                                       |   |  |  | ***************************************                                    |
| not applied on line 5 or fi   |                                       | 20,524.                                 |  |  |  |
| 9 Excess distributions car  | · -                                   |   |  |  | ***************************************                                    |
| Subtract lines 7 and 8 fro  |                                       | 99,279.                                 |  |  |  |
| 10 Analysis of line 9.  |                                       | · · · · · · · · · · · · · · · · · · ·   | ***************************************    |  | ······································                                     |
| a Excess from 2005  | 9,269.                                |   |  |  |  |
| b Excess from 2006  | 20,174.                               |   |  |  |  |
| c Excess from 2007  | 22,840.                               |   |  |  |  |
| d Excess from 2008  | 24,373.                               |   |  |  |  |
| e Excess from 2009  | 22,623.                               |   |  |  |  |
|   | <del></del> _                         |   |  |  | Form 990-DF (2009)   |

11-64501

| 3 Grants and Contributions Paid During the | fear or Approved for Future I   | Payment                              |                                  |            |
|--|---|--------------------------------------|----------------------------------|------------|
| Recipient                                  | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or contribution | Amount     |
| Name and address (home or business)        | or substantial contributor  | recipient                            | Contribution                     | , <b>.</b> |
| a Paid during the year                     |   |                                      |                                  |            |
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|  |   |                                      |                                  |            |
| SEE STATEMENT 4                            |   |                                      |                                  |            |
| Total .                                    |   |                                      | <b>▶</b> 3a                      | 19,955     |
| b Approved for future payment              |   |                                      |                                  |            |
|  |   |                                      |                                  |            |
|  |   |                                      |                                  |            |
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| NONE                                       |   |                                      |                                  |            |
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|  |   |                                      |                                  |            |
| Total                                      |   |                                      | b 3b                             | 0          |

Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated                  | Unrelated  | business Income |                       | ded by section 512, 513, or 514 | (e)                               |
|---|--|-----------------|-----------------------|---------------------------------|-----------------------------------|
|   | (a)<br>Business                                  | (b)<br>Amount   | (C)<br>Exclu-<br>sion | (d)<br>Amount                   | Related or exempt function income |
| 1 Program service revenue                                       | code   | Amount          | code                  | Alliquit                        | - Iunction income                 |
| a<br>b  |  |                 |                       |                                 |                                   |
|   |  |                 |                       |                                 |                                   |
|   | <del>                                     </del> |                 | +                     |                                 |                                   |
| u   |  |                 |                       |                                 |                                   |
| 1   |  |                 |                       |                                 | ·                                 |
| g Fees and contracts from government agencies                   |  |                 |                       |                                 |                                   |
| 2 Membership dues and assessments                               |  |                 |                       |                                 |                                   |
| 3 Interest on savings and temporary cash                        |  |                 |                       |                                 |                                   |
| investments   |  |                 |                       |                                 |                                   |
| 4 Dividends and interest from securities                        |  |                 | 14                    | 14.                             |                                   |
| 5 Net rental income or (loss) from real estate                  |  |                 |                       |                                 |                                   |
| a Debt-financed property  |  |                 |                       |                                 |                                   |
| <b>b</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      |  |                 |                       |                                 |                                   |
| 9 Net income or (loss) from special events                      |  |                 |                       | ,                               |                                   |
| IO Gross profit or (loss) from sales of inventory               |  |                 |                       |                                 |                                   |
| 11 Other revenue  |  |                 |                       |                                 |                                   |
| a   |  |                 |                       |                                 |                                   |
| b   |  |                 |                       |                                 |                                   |
| C   |  |                 |                       |                                 |                                   |
| d   |  |                 |                       |                                 |                                   |
| e   |  |                 | $\longrightarrow$     |                                 |                                   |
| 12 Subtotal Add columns (b), (d), and (e)                       |  | (               | 0.                    | 14.                             | 0                                 |
| 13 Total. Add line 12, columns (b), (d), and (e)                |  |                 | •                     | 13                              | 14                                |
| (See worksheet in line 13 instructions to verify calculations ) |  |                 |                       |                                 |                                   |

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

923621 02-02-10

|           |   | anefore To and Transaction                     | s and Relationships With Nonc                       |                         | Page 13       |
|-----------|---|--|---|-------------------------|---------------|
| . ,       | Exempt Organizations  | ansiers to and transactions                    | s and Relationships with North                      | , iai itable            |               |
| 1         | Did the organization directly or indirectly engage in a                             | any of the following with any other organiz    | ation described in section 501(c) of                | Ye                      | s No          |
|           | the Code (other than section 501(c)(3) organizations                                | s) or in section 527, relating to political or | ganizations?  |                         |               |
| a         | a Transfers from the reporting foundation to a noncha                               | iritable exempt organization of                |   |                         |               |
|           | (1) Cash  |  |   | 1a(1)                   | X             |
|           | (2) Other assets  |  |   | 1a(2)                   | X             |
| b         | b Other transactions  |  |   |                         | v             |
|           | (1) Sales of assets to a noncnaritable exempt organ                                 |  | •   | 1b(1)                   | $\frac{X}{X}$ |
|           | (2) Purchases of assets from a noncharitable exem                                   | ipt organization                               |   | 1b(2)                   | $\frac{X}{X}$ |
|           | (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements |  | •   | 1b(3)<br>1b(4)          | $\frac{X}{X}$ |
|           | (5) Loans or loan guarantees  |  |   | 1b(5)                   | X             |
|           | (6) Performance of services or membership or fund                                   | draising solicitations                         |   | 1b(6)                   | $\frac{x}{x}$ |
| c         | c Sharing of facilities, equipment, mailing lists, other a                          |  |   | 10                      | X             |
|           | d If the answer to any of the above is "Yes," complete t                            |  | I always show the fair market value of the go       |                         |               |
|           | or services given by the reporting foundation. If the                               |  |   |                         |               |
|           | column (d) the value of the goods, other assets, or s                               | services received                              |   |                         |               |
| (a)       | Line no (b) Amount involved (c) Nam   | e of noncharitable exempt organization         | (d) Description of transfers, transactions          | , and sharing arrange   | ments         |
|           |   | N/A  |   |                         |               |
| _         |   |  |   |                         |               |
|           |   |  |   | ·                       |               |
|           |   |  |   | <del></del>             |               |
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| _         |   |  |   | ·                       |               |
|           |   |  |   |                         |               |
|           |   |  |   |                         |               |
| 28        | a is the foundation directly or indirectly affiliated with,                         | , or related to, one or more tax-exempt org    | janizations described                               |                         |               |
|           | ın section 501(c) of the Code (other than section 50                                | 11(c)(3)) or in section 527?                   |   | Yes [                   | X No          |
|           | b If "Yes," complete the following schedule   |  |   |                         |               |
| _         | (a) Name of organization  | (b) Type of organization                       | on (c) Description of rela                          | tionship                |               |
| _         | N/A   |  |   |                         |               |
|           |   |  |   |                         |               |
|           |   |  |   |                         |               |
|           |   |  |   |                         |               |
|           | Under penalties of penury I deelare that I have examined this                       | ratus including accompanying schedules and et  | atements, and to the best of my knowledge and belie | f it is true somest     |               |
|           | and complete Declaration of preparer letter than taxpayer or fi                     |  |   | , it is true, contect,  |               |
|           | (-)///  | 15/0/-   | ~TD.~   |                         |               |
| 9         | Signature of officer or trustee   | <u>                                    </u>    | Title TRUSTER                                       |                         |               |
| 半         | Preparer's  |  | <del></del>   | reparer's Identifying i | number        |
| Sign Here | signature   | Home of  | l leeff   | P0015183                |               |
| S         | Firm's name (or yours HOMLER & HO   | MLER, LLP, CPA'S                               | EIN ► 03-0  | 460159                  | <del>-</del>  |
|           | signature Firm's name (or yours HOMLER & HO) if self-employed), 25 SOUTH SE         | RVICE ROAD                                     | <u> </u>  |                         |               |
|           | address, and ZIP code JERICHO, NY   |  | Phone no (5   | 16)747-1                | 191           |

11-64501

#### Schedule B (Form 990, 990-EZ, or 990-PE)

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 **Employer identification number** THE KING FAMILY CHARITABLE TRUST 11-6450731 Organization type (check one): Filers of: Section: Form 990 or 990-EZ 」 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. **General Rule** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. **Special Rules** For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF). but it must answer "No" on Part IV, line 2 of its Form 990, or check the box 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).

LHA 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)

|      | 1 |    |   |         |
|------|---|----|---|---------|
| Page | Ŧ | of | 1 | of Part |

Name of organization

**Employer Identification number** 

# THE KING FAMILY CHARITABLE TRUST

11-6450731

| Part I     | Contributors (see instructions)                       |                             |   |
|------------|---|-----------------------------|---|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                     | (c) Aggregate contributions | (d) Type of contribution  |
| 1          | GISELA KING 6 HADDINGTON DRIVE OLD WESTBURY, NY 11568 | \$\$                        | Person X Payroll Noncash (Complete Part II if there is a noncash contribution.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                     | (c) Aggregate contributions | (d)<br>Type of contribution   |
|            |   | \$                          | Person Payroll Noncash (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                     | (c) Aggregate contributions | (d)<br>Type of contribution   |
|            |   | \$                          | Person Payroll Noncash (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                     | (c) Aggregate contributions | (d)<br>Type of contribution   |
|            |   | \$                          | Person Payroll Noncash (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                     | (c) Aggregate contributions | (d) Type of contribution  |
| :          |   | \$                          | Person Payroll Noncash (Complete Part II if there is a noncash contribution.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                     | (c) Aggregate contributions | (d)<br>Type of contribution   |
|            |   | \$                          | Person Payroll Noncash (Complete Part II if there is a noncash contribution.)   |

| FORM 990-PF DIVIDENT          | OS AND         | INTER               | EST FROM                  | SECUI | RITIES                       | STATEMENT | 1          |
|-------------------------------|----------------|---------------------|---------------------------|-------|------------------------------|-----------|------------|
| SOURCE                        |                | GROSS               | AMOUNT                    |       | ITAL GAINS<br>IVIDENDS       | COLUMN (A | <b>A</b> ) |
| CHARLES SCHWAB & CO.          |                |                     | 14.                       |       | 0.                           |           | 14.        |
| TOTAL TO FM 990-PF, PART I, I | LN 4           |                     | 14.                       |       | 0.                           |           | 14.        |
| FORM 990-PF                   | AC             | COUNTI              | NG FEES                   |       |                              | STATEMENT | 2          |
| DESCRIPTION                   | EXPE           | A)<br>NSES<br>BOOKS | (B)<br>NET INV<br>MENT IN |       | (C)<br>ADJUSTED<br>NET INCOM |           |            |
| ACCOUNTING                    |                | 3,500.              |                           | 350.  |                              | 3,1       | 50.        |
| TO FORM 990-PF, PG 1, LN 16B  |                | 3,500.              |                           | 350.  |                              | 3,1       | 50.        |
| FORM 990-PF                   | OTHER EXPENSES |                     | STATEMENT                 |       | 3                            |           |            |
| DESCRIPTION                   | EXPE           | A)<br>NSES<br>BOOKS | (B)<br>NET INV<br>MENT IN |       | (C)<br>ADJUSTED<br>NET INCOM |           |            |
| FILING FEE                    |                | 25.                 |                           | 0.    |                              |           | 25.        |
| TO FORM 990-PF, PG 1, LN 23   | <del></del>    | 25.                 |                           | 0.    |                              |           | 25.        |

|  | AND CONTRIBUTIONS DURING THE YEAR              | STATEMENT 4 |        |  |
|--|--|-------------|--------|--|
| RECIPIENT NAME AND ADDRESS   | RECIPIENT RELATIONSHIP<br>AND PURPOSE OF GRANT |             | AMOUNT |  |
| AMERICAN MUSEUM OF NATURAL<br>HISTORY<br>CENTRAL PARK WEST AT 79TH STREET<br>NEW YORK, NY 100249981      | N/A<br>NATURAL HISTORY                         | PUBLIC      | 400.   |  |
| BAY STREET THEATRE<br>P.O. BOX 810 SAG HARBOR, NY<br>11963   |  | PUBLIC      | 150.   |  |
| FRIENDS OF WESTHAMPTON AMBULANCE 3 HAZELWOOD AVENUE WESTHAMPTON BEACH, NY 119787324                      |  | PUBLIC      | 100.   |  |
| GARDEN CITY LIONS CLUB   | N/A  | PUBLIC      | 60.    |  |
| INTERNATIONAL SURGICAL MISSION SUPPORT INC. 365 COUNTRY ROAD 39A, BENTON PLAZA, SUITE 11 SOUTHAMPTON, NY | N/A  | PUBLIC      | 300.   |  |
| MANHATTAN THEATRE CLUB<br>311 W. 43RD STREET NEW YORK, NY<br>10036                                       |  | PUBLIC      | 2,000. |  |
| METROPOLITAN MUSEUM OF ART GRACIE STATION PO BOX 814 NEW YORK, NY 101300087                              | N/A<br>ART                                     | PUBLIC      | 200.   |  |
| NASSAU POLICE CONFERENCE, INC.<br>P.O. BOX 490 LYNBROOK, NY 11563  | N/A  | PUBLIC      | 150.   |  |

| THE KING FAMILY CHARITABLE TRU   | ST  |        | 11-6450731 |
|--|---|--------|------------|
| NATIONAL ORGANIZATION FOR RARE DISORDERS PO BOX 1968 DANBURY, CT 068131968             | N/A<br>MEDICAL RESEARCH   | PUBLIC | 100.       |
| NEW YORK BOTANICAL GARDEN<br>2900 SOUTHERN BOULEVARD BRONX,<br>NY 104589999            | N/A<br>PUBLIC BOTANICAL<br>GARDENS                                | PUBLIC | 75.        |
| QUOGUE VILLAGE PBA<br>PO BOX 449 QUOGUE, NY 11959                                      | N/A<br>SUPPORT POLICE<br>BENEVOLENT ASSOCIATION<br>ACTIVITIES     | PUBLIC | 100.       |
| SUFFOLK UNIVERSITY LAW SCHOOL<br>8 ASHBURTON PLACE BOSTON, MA<br>02108                 | •   | PUBLIC | 1,000.     |
| THE HORTICULTURAL ALLIANCE OF THE HAMPTONS P.O. BOX 202 BRIDGEHAMPTON, NY 119320202    | N/A<br>SUPPORTS EFFORTS TO<br>FOSTER THE ART &<br>SCIENCE OF HORT | PUBLIC | 125.       |
| THE HORTICULTURAL ALLIANCE OF THE HAMPTONS P.O. BOX 202 BRIDGEHAMPTON, NY 119320202    | N/A<br>SUPPORTS EFFORTS TO<br>FOSTER THE ART &<br>SCIENCE OF HORT | PUBLIC | 150.       |
| THE JEWISH COMMUNITY CENTER IN MANHATTAN 334 AMSTERDAM AVE FL-8 NEW YORK, NY 101330618 | N/A   | PUBLIC | 100.       |
| THE NATURE CONSERVANCY<br>4245 N. FAIRFAX DRIVE SUITE 100<br>ARLINGTON, VA 22203       | N/A   | PUBLIC | 100.       |
| THE QUOGUE LIBRARY<br>BOX 5036 QUOGUE, NY 11959  | N/A<br>TO BUY LIBRARY<br>MATERIALS                                | PUBLIC | 500.       |
| THIRTEEN ASSOCIATES 450 WEST 33RD STREET NEW YORK,                                     | N/A<br>PUBLIC TELEVISION  | PUBLIC | 200.       |

NY 100012605

| THE KING FAMILY CHARITABLE TRUS  | ST                                   |        | 11-6450731 |
|--|--------------------------------------|--------|------------|
| UNIVERSITY OF NEW HAMPSHIRE<br>9 EDGEWOOD ROAD DURHAM, NH<br>038241934                       | N/A PRESIDENT'S FUND FOR EXCELLENCE  | PUBLIC | 1,000.     |
| UNIVERSITY OF PENNSYLVANNIA<br>3400 CHESTNUT STREET<br>PHILADELPHIA, PA 191046204            | N/A                                  | PUBLIC | 500.       |
| WESTHAMPTON BEACH PERFORMING<br>ARTS CENTER<br>76 MAIN STREET WESTHAMPTON<br>BEACH, NY 11978 | N/A<br>PERFORMING ARTS               | PUBLIC | 10,000.    |
| WILDLIFE CONSERVATION SOCIETY P.O. BOX 108 BRONX, NY 104589950                               | N/A<br>TO PROTECT MARINE<br>WILDLIFE | PUBLIC | 120.       |
| WLIW 21<br>P.O. BOX 2100 NEW YORK, NY<br>101162100   | N/A<br>PUBLIC TELEVISION             | PUBLIC | 250.       |
| WLIW 21<br>P.O. BOX 2100 NEW YORK, NY<br>101162100   | N/A<br>PUBLIC TELEVISION             | PUBLIC | 250.       |
| WNPR CONNECTICUT PUBLIC RADIO P.O. BOX 8000 HARTFORD, CT 061800207                           | N/A<br>PUBLIC RADIO                  | PUBLIC | 250.       |
| WNYC<br>PO BOX 1550 NEW YORK, NY   | N/A<br>PUBLIC RADIO                  | PUBLIC | 100.       |
| THIRTEEN ASSOCIATES 450 WEST 33RD STREET NEW YORK, NY 10001                                  | N/A<br>PUBLIC TELEVISION             | PUBLIC | 250.       |
| THE NATIONAL HIGH SCHOOL MUSICAL THEATER AWARDS 719 LIBERTY AVENUE PITTSBURGH, PA 15222      | N/A                                  | PUBLIC | 125.       |

| THE KING FAMILY CHARITABLE TRUS   | T     |        | 11-6450731 |
|---|-------|--------|------------|
| THE QUOGUE HISTORICAL SOCIETY PO BOX 1207 QUOGUE, NY 11959-1207                       | N/A   | PUBLIC | 100.       |
| ORTHOPEDIC FOUNDATION FOR ACTIVE LIFE 31 RIVER ROAD COS COB, CT 06807                 | N/A   | PUBLIC | 250.       |
| PADDLERS FOR HUMANITY PO BOX 2555 EAST HAMPTON, NY 11937                              | N/A   | PUBLIC | 250.       |
| METROPOLITAN MUSEUM OF ART PO BOX 814 NEW YORK, NY 10130-0087                         | N/A   | PUBLIC | 250.       |
| INTERNATIONAL WOMEN'S HEALTH<br>COALITION<br>333 SEVENTH AVENUE NEW YORK, NY<br>10001 | N/A   | PUBLIC | 250.       |
| CITY HARVEST<br>575 EIGHTH AVENUE NEW YORK, NY<br>10018                               | N/A   | PUBLIC | 200.       |
| TOTAL TO FORM 990-PF, PART XV, LI   | NE 3A |        | 19,955.    |