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Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No 1545-0047

2009

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

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

B Check if applicable:
 Address change
 Name change
 Initial return
 Terminated
 Amended return
 Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization SWEDENBORG FOUNDATION, INC
 Doing Business As
 Number and street (or P O box if mail is not delivered to street address) Room/suite
 320 NORTH CHURCH STREET
 City or town, state or country, and ZIP + 4
 WEST CHESTER PA 19380

D Employer identification number
13-1362850

E Telephone number
800-355-3222

G Gross receipts \$ 9,776,446

F Name and address of principal officer.

H(a) Is this a group return for affiliates? Yes No
H(b) Are all affiliates included? Yes No
 If "No," attach a list (see instructions)

I Tax-exempt status 501(c) (3) ◀ (insert no.) 4947(a)(1) or 527

J Website: ▶ WWW.SWEDENBORG.COM **H(c)** Group exemption number ▶

K Form of organization Corporation Trust Association Other ▶ **L Year of formation** 1849 **M State of legal domicile** PA

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities TO TRANSLATE, PUBLISH AND DISTRIBUTE THE WORKS OF EMANUEL SWEDENBORG AND OTHER RELIGIOUS AND EDUCATIONAL BOOKS		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	14
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	14
	5 Total number of employees (Part V, line 2a)	5	12
	6 Total number of volunteers (estimate if necessary)	6	
	7a Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	0
b Net unrelated business taxable income from Form 990-T, line 34	7b	0	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	118,238	411,808
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	0	0
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	279,035	-1,456,137
	12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	-4,969,380	3,800,667
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	0	0
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15 Salaries, other compensation, or employee benefits (Part IX, column (A), lines 5–10)	385,787	489,023
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b Total fundraising expenses (Part IX, column (D), line 25)	112,530	
	17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	491,297	447,816
	18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	877,084	936,839
19 Revenue less expenses. Subtract line 18 from line 12	-5,449,191	1,819,499	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21 Total liabilities (Part X, line 26)	13,575,178	15,411,717
	22 Net assets or fund balances. Subtract line 21 from line 20	68,403	85,442
		13,506,775	15,326,275

Part II Signature Block

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

Sign Here
 Signature of officer: *Marilyn F. Smith* President Date: 5/5/10
 Type or print name and title: MARILYN F. SMITH, PRESIDENT

Paid Preparer's Use Only
 Preparer's signature: *Alan M. Thierman* Date: 4/21/2010
 Check if self-employed: Preparer's identifying number (see instructions): P00104400
 Firm's name (or yours if self-employed), address, and ZIP + 4: ALAN M THIERMAN CPA, 41 WOODBINE STREET, BERGENFIELD, NJ 07621
 EIN: 13-3840518 Phone no: (201) 439-0800

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

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Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission
TO TRANSLATE, PUBLISH AND DISTRIBUTE THE WORKS OF EMANUEL SWEDENBOURG AND OTHER RELIGIOUS AND
EDUCATIONAL BOOKS TO THE GENERAL PUBLIC

2 Did the organization undertake any significant program services during the year which were not listed on
the prior Form 990 or 990-EZ? Yes No
If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program
services? Yes No
If "Yes," describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses.
Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and
allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses \$ 339,604 including grants of \$ 0) (Revenue \$ 0)
PUBLICATION AND DISTRIBUTION OF THE WORKS OF EMANUEL SWEDENBORG
AND OTHER RELIGIOUS OR EDUCATIONAL BOOKS

4b (Code) (Expenses \$ 137,822 including grants of \$ 0) (Revenue \$ 0)
PUBLICATION OF FREE LITERATURE, BROCHURES, CALENDAR BOOKS LISTING, ETC

4c (Code) (Expenses \$ 24,629 including grants of \$ 0) (Revenue \$ 0)
FREE DISTRIBUTION OF EDUCATIONAL MATERIALS AND MUSEUM EXHIBITS
AT SCHOOLS, GROUPS, CLUBS, COLLEGES, CHURCHES, REHABILITATION CENTERS AND
EDUCATION FORUMS.

4d Other program services (Describe in Schedule O)
(Expenses \$ 0 including grants of \$ 0) (Revenue \$ 0)

4e Total program service expenses ▶ 502,055

Part IV Checklist of Required Schedules

Table with 20 rows of questions and Yes/No columns. Questions include: 1. Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? 2. Is the organization required to complete Schedule B, Schedule of Contributors? 3. Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? 4. Section 501(c)(3) organizations. Did the organization engage in lobbying activities? 5. Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? 6. Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? 7. Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? 8. Did the organization maintain collections of works of art, historical treasures, or other similar assets? 9. Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? 10. Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? 11. Is the organization's answer to any of the following questions "Yes"? 12. Did the organization obtain separate, independent audited financial statements for the tax year? 12A. Was the organization included in consolidated, independent audited financial statements for the tax year? 13. Is the organization a school described in section 170(b)(1)(A)(ii)? 14a. Did the organization maintain an office, employees, or agents outside of the United States? 14b. Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? 15. Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? 16. Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? 17. Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? 18. Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? 19. Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? 20. Did the organization operate one or more hospitals?

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21	
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22	
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25</i>	24a	
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	26	X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27	X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29	X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	34	X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35	X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37	X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O.	38	X

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable		
	1a 39		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
	1b		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
	1c		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
	2a 12		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
	2b		
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
	3a		
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
	3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
	4a		
b	If "Yes," enter the name of the foreign country: ▶ _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
	4b		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
	5a		
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
	5b		
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
	5c		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
	6a		
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
	6b		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		
	7a		
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
	7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		
	7c		
d	If "Yes," indicate the number of Forms 8282 filed during the year		
	7d		
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		
	7e		
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
	7f		
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
	7g		
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
	7h		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
	8		
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the organization make any taxable distributions under section 4966?		
	9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?		
	9b		
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body		
1a		14	
b	Enter the number of voting members that are independent		
1b		14	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	X	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a material diversion of the organization's assets?		X
6	Does the organization have members or stockholders?		X
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
7b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
8a		X	
b	Each committee with authority to act on behalf of the governing body?	X	
8b		X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X
9a			X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Does the organization have local chapters, branches, or affiliates?		X
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
10b			
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	X	
11A	Describe in Schedule O the process, if any, used by the organization to review this Form 990		
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	X	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12b		X	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	X	
12c		X	
13	Does the organization have a written whistleblower policy?		X
14	Does the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official	X	
15a		X	
b	Other officers or key employees of the organization	X	
15b		X	
	If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions)		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		
16b			

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed ► NY, PA
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
 Own website Another's website Upon request
- 19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ► SWEDENBORG FOUNDATION INC 800-355-3222
 320 NORTH CHURCH ST, WEST CHESTER, PA 19380

Part VIII		Statement of Revenue		(A)	(B)	(C)	(D)
				Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns	1a	0			
	b	Membership dues	1b	28,101			
	c	Fundraising events	1c	0			
	d	Related organizations	1d	0			
	e	Government grants (contributions)	1e	0			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	383,707			
	g	Noncash contributions included in lines 1a-1f \$		0			
	h	Total. Add lines 1a-1f			411,808		
Program Service Revenue	2a		Business Code				
	b			0			
	c			0			
	d			0			
	e			0			
	f	All other program service revenue			0		
	g	Total. Add lines 2a-2f			0		
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)			244,250		
	4	Income from investment of tax-exempt bond proceeds			0		
	5	Royalties			0		
	6a	Gross Rents	(i) Real	(ii) Personal			
	b	Less: rental expenses					
	c	Rental income or (loss)	0	0			
	d	Net rental income or (loss)			0		
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
	b	Less: cost or other basis and sales expenses	4,918,395	0			
	c	Gain or (loss)	6,618,782	0			
	d	Net gain or (loss)	-1,700,387	0			
	8a	Gross income from fundraising events (not including \$ 0 of contributions reported on line 1c). See Part IV, line 18.	a		0		
	b	Less: direct expenses	b		0		
	c	Net income or (loss) from fundraising events			0		
	9a	Gross income from gaming activities. See Part IV, line 19.	a		0		
b	Less: direct expenses	b		0			
c	Net income or (loss) from gaming activities			0			
10a	Gross sales of inventory, less returns and allowances	a		90,292			
b	Less: cost of goods sold	b		401,326			
c	Net income or (loss) from sales of inventory			-311,034			
Miscellaneous Revenue		Business Code					
11a	MISC	900099		63			
b	UNREALIZED GAIN ON INVESTMENTS	900099		4,111,638			
c				0			
d	All other revenue			0			
e	Total. Add lines 11a-11d			4,111,701			
12	Total revenue. See instructions.			2,756,338	0	0	0

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	0			
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22	0			
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16	0			
4 Benefits paid to or for members	0			
5 Compensation of current officers, directors, trustees, and key employees	0			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0			
7 Other salaries and wages	370,881	181,816	158,289	30,776
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	16,648	7,863	7,250	1,535
9 Other employee benefits	51,082	23,735	21,981	5,366
10 Payroll taxes	50,412	24,411	21,722	4,279
11 Fees for services (non-employees):				
a Management	0			
b Legal	0			
c Accounting	0			
d Lobbying	0			
e Professional fundraising services. See Part IV, line 17	0			
f Investment management fees	0			
g Other	103,041	67,270	28,999	6,772
12 Advertising and promotion	0			
13 Office expenses	0			
14 Information technology	0			
15 Royalties	0			
16 Occupancy	93,554	45,862	39,929	7,763
17 Travel	31,368	15,377	13,388	2,603
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0			
19 Conferences, conventions, and meetings	33,706	31,921	1,494	291
20 Interest	0			
21 Payments to affiliates	0			
22 Depreciation, depletion, and amortization	18,939	10,116	7,387	1,436
23 Insurance	0			
24 Other expenses. Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a MISCELLANEOUS	45,605	21,096	20,939	3,570
b FUND RAISING PUBLICATIONS	37,602			37,602
c POSTAGE AND SHIPPING	83,766	72,588	641	10,537
d ADMINISTRATIVE PUBLICATIONS	235		235	
e	0			
f All other expenses	0			
25 Total functional expenses. Add lines 1 through 24f	936,839	502,055	322,254	112,530
26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
Assets	1 Cash—non-interest-bearing	60,934	1	49,154
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net	31,672	3	73,172
	4 Accounts receivable, net	30,038	4	26,986
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0	5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Complete Part II of Schedule L	0	6	
	7 Notes and loans receivable, net	0	7	0
	8 Inventories for sale or use	1,069,292	8	1,075,072
	9 Prepaid expenses and deferred charges	54,492	9	49,379
	10a Land, buildings, and equipment cost or other basis. Complete Part VI of Schedule D	10a 787,063		
	b Less: accumulated depreciation	10b 257,379	10c	529,684
	11 Investments—publicly traded securities	11,782,176	11	13,608,270
	12 Investments—other securities See Part IV, line 11	0	12	0
	13 Investments—program-related See Part IV, line 11	12,943	13	0
	14 Intangible assets	0	14	0
	15 Other assets. See Part IV, line 11	0	15	0
16 Total assets. Add lines 1 through 15 (must equal line 34)	13,575,178	16	15,411,717	
Liabilities	17 Accounts payable and accrued expenses	68,403	17	85,442
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities	0	20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L	0	22	
	23 Secured mortgages and notes payable to unrelated third parties	0	23	0
	24 Unsecured notes and loans payable to unrelated third parties	0	24	0
	25 Other liabilities Complete Part X of Schedule D	0	25	0
	26 Total liabilities. Add lines 17 through 25	68,403	26	85,442
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	12,917,027	27	14,581,217
	28 Temporarily restricted net assets	533,832	28	667,612
	29 Permanently restricted net assets	55,916	29	77,446
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	13,506,775	33	15,326,275
	34 Total liabilities and net assets/fund balances	13,575,178	34	15,411,717

Part XI Financial Statements and Reporting

1 Accounting method used to prepare the Form 990. Cash Accrual Other _____
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O

2a Were the organization's financial statements compiled or reviewed by an independent accountant?

b Were the organization's financial statements audited by an independent accountant?

c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?
 If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O

d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both.

Separate basis Consolidated basis Both consolidated and separate basis

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?

b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
 (Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants")	632,178	364,500	174,596	131,238	370,308	1,672,820
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0		0		0
3 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0				0
4 Total. Add lines 1 through 3	632,178	364,500	174,596	131,238	370,308	1,672,820
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						537,616
6 Public support. Subtract line 5 from line 4						1,135,204

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	632,178	364,500	174,596	131,238	370,308	1,672,820
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	408,431	321,121	494,395	418,955	244,250	1,887,152
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	833	247	-304	43	63	882
11 Total support. Add lines 7 through 10						3,560,854
12 Gross receipts from related activities, etc (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	31.88%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	31.13%
16a 33 1/3% support test-2009. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b 33 1/3% support test-2008. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17a 10%-facts-and-circumstances test-2009. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . ▶ <input checked="" type="checkbox"/>		
b 10%-facts-and-circumstances test-2008. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization . . . ▶ <input checked="" type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")	0	0				0
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	0	0				0
3 Gross receipts from activities that are not an unrelated trade or business under section 513						0
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0				0
5 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0				0
6 Total. Add lines 1 through 5	0	0	0	0	0	0
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						0
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						0
c Add lines 7a and 7b	0	0	0	0	0	0
8 Public support (Subtract line 7c from line 6)						0

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6	0	0	0	0	0	0
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						0
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						0
c Add lines 10a and 10b	0	0	0	0	0	0
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						0
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)	0	0				0
13 Total support. (Add lines 9, 10c, 11, and 12)	0	0	0	0	0	0
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	0.00%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	0.00%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	0.00%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	0.00%

19a 33 1/3% support tests—2009. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ▶

b 33 1/3% support tests—2008. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ▶

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶

**SCHEDULE D
(Form 990)**

Supplemental Financial Statements

OMB No 1545-0047

2009

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service
Name of the organization

▶ **Complete if the organization answered "Yes," to Form 990,
Part IV, line 6, 7, 8, 9, 10, 11, or 12.**
▶ **Attach to Form 990. ▶ See separate instructions.**

Employer identification number
13-1362850

SWEDENBORG FOUNDATION, INC

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		<input type="checkbox"/> Yes <input type="checkbox"/> No

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).
 Preservation of land for public use (e.g., recreation or pleasure) Preservation of an historically important land area
 Protection of natural habitat Preservation of a certified historic structure
 Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? Yes No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$

(ii) Assets included in Form 990, Part X ▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 ▶ \$

b Assets included in Form 990, Part X ▶ \$

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

- a Public exhibition
- b Scholarly research
- c Preservation for future generations
- d Loan or exchange programs
- e Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f 0

2a Did the organization include an amount on Form 990, Part X, line 21? Yes No

b If "Yes," explain the arrangement in Part XIV

Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	0	0			

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment %
- b Permanent endowment %
- c Term endowment %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i) unrelated organizations Yes No
- (ii) related organizations Yes No

b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? Yes No

4 Describe in Part XIV the intended uses of the organization's endowment funds

Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land	0	128,523	0	128,523
b Buildings	0	463,212	80,292	382,920
c Leasehold improvements	0	0	0	0
d Equipment	0	195,328	177,087	18,241
e Other	0	0	0	0
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				529,684

Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements			
1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	2,756,338
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	936,839
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	1,819,499
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV.)	8	
9	Total adjustments (net) Add lines 4 through 8	9	0
10	Excess or (deficit) for the year per audited financial statements Combine lines 3 and 9	10	1,819,499

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return			
1	Total revenue, gains, and other support per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV.)	2d	
e	Add lines 2a through 2d	2e	0
3	Subtract line 2e from line 1	3	0
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	
c	Add lines 4a and 4b	4c	0
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12)	5	0

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return			
1	Total expenses and losses per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV.)	2d	
e	Add lines 2a through 2d	2e	0
3	Subtract line 2e from line 1	3	0
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	
c	Add lines 4a and 4b	4c	0
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	0

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8, Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information

**SCHEDULE O
(Form 990)**

Supplemental Information to Form 990

OMB No 1545-0047

2009

**Open to Public
Inspection**

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990.

Department of the Treasury
Internal Revenue Service

Name of the organization

Employer identification number

SWEDENBORG FOUNDATION, INC

13-1362850

Form 990 Part IV Section B Line 11A THE PRESIDENT AND TREASURER REVIEW THE FORM 990 FORM 990 IS
AVAILABLE FOR PUBLIC INSPECTION AT THE FOUNDATION HQS FOR ALL PARTIES OF INTEREST.

Form 990 Part IV Section B Line 15B ALL COMPENSATION DECISIONS ARE BUDGETED AND APPROVED BY AN
AUTHORIZED COMMITTEE OF THE BOARD OF DIRECTORS.

Form 990 Part IV Section C Line 19 ALL ANNUAL FINANCIAL STATEMENTS, FORM 990 AND OTHER FINANCIAL
DOCUMENTS ARE MADE AVAILABLE TO PARTIES OF INTEREST AT THE ANNUAL MEETING AND UPON REQUEST DURING
THE YEAR

Part IX, Line 22 (990) - Depreciation, Depletion, and Amortization

	(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
1 Depreciation	18,939	10,116	7,387	1,436
2 Depletion	0			
3 Amortization	0			
4 Total	18,939	10,116	7,387	1,436

Part VIII, Line 10 (990) - Gross Sales of Inventory

90,292 401,326 -311,034

Category	Gross Sales	Cost of Goods Sold	Net
1 SALES OF BOOKS AND VIDEOS	90,292	401,326	-311,034
2			0
3			0
4			0
5			0
6			0
7			0
8			0
9			0
10			0
11			0
12			0
13			0
14			0
15			0
16			0
17			0
18			0
19			0
20			0

Part VIII, Lines 1a-h (990) - Contributions, Gifts, Grants, and Other Amounts

	Cash	Noncash
1 Federated Campaigns		
2 Membership dues	28,101	
3 Fundraising events		
4 Related organizations		
5 Government grants (contributions)		
6 All other contributions, gifts, grants, and similar amounts not included above: GIFTS AND BEQUESTS FROM THE GENERAL PUBLIC	383,707	
Other contributions total	383,707	0
7 Total	411,808	0

Part X, Line 3 (990) - Pledges and Grants Receivable

		Pledges and grants receivable		Allowance for doubtful accounts	
		Beginning	End	Beginning	End
1					
2	PLEDGES RECEIVABLE	31,672	73,172		
3					
4					
5					
6					
7					
8					
9					
10					
11	Total pledges and grants receivable	31,672	73,172	0	0

Part X, Line 4 (990) - Accounts Receivable

		Accounts receivable		Allowance for doubtful accounts	
		Beginning	End	Beginning	End
1	TRADE ACCOUNTS RECEIVABLE	30,038	26,986		
2					
3					
4					
5					
6					
7					
8					
9					
10					
11	Total accounts receivable	30,038	26,986	0	0

Part X, Line 13 (990) - Investments - Program Related

Check one box to indicate how investments are listed:		0	12,943	0
<input type="checkbox"/>	Cost			
<input checked="" type="checkbox"/>	End of year market value (FMV)			
	Description	Book value	Beginning FMV	Ending FMV
1	INVESTMENT IN ANNUITY		12,943	0
2			0	0
3			0	0
4			0	0
5			0	0
6			0	0
7			0	0
8			0	0
9			0	0
10			0	0
11			0	0
12			0	0
13			0	0
14			0	0
15			0	0
16			0	0
17			0	0
18			0	0
19			0	0
20			0	0

Part VIII, Line 7 (990) - Gain/Loss from Sale of Assets Other than Inventory

Index	Description	CUSIP #	Check if gain/loss is from sale of public securities	Check if gain/loss is from sale of non public securities	Check if purchaser is a business	Purchaser	Date acquired	Acquisition method	Date sold	Gross sales price	Cost or other basis (Enter one field only)		Expense of sale and cost of improvements	Depreciation	Description of Basis Method	
											Cost	Donated value				
Totals																
											Gross sales		Cost, other basis and expenses			
											4,918,395	6,618,782				
											0	0				
											0	0				
Public Securities																
Non-Public Securities																
Other sales																
1	FIDELITY ADV HI INCOME		X					PURCHASE	1/12/2009	625,605	1,015,000					
2	IVY GLOBAL NAT RES		X					PURCHASE	2/18/2009	132,842	200,000					
3	MATTHEWS PACIFIC TIGER		X					PURCHASE	2/18/2009	140,000	284,211					
4	THIRD AVENUE VALUE FD		X					PURCHASE	4/2/2009	313,635	550,000					
5	JP MORGAN US LG CAP		X					PURCHASE	4/2/2009	190,000	298,530					
6	JP MORGAN CORE BD FD		X					PURCHASE	4/2/2009	250,000	249,768					
7	JP MORGAN SHT DUR BD		X					PURCHASE	4/2/2009	250,000	249,296					
8	JP MORGAN COR BD FD		X					PURCHASE	4/3/2009	100,000	100,186					
9	JP MORG SHT DUR BD FD		X					PURCHASE	4/3/2009	100,000	99,812					
10	JP MORG MID CAP VALUE		X					PURCHASE	5/8/2009	115,000	155,687					
11	JP MORG PRIM MM FD		X					PURCHASE	5/11/2009	220,000	220,000					
12	ISHARES RUSSELL 2000		X					PURCHASE	5/7/2009	180,436	255,702					
13	ISHARES RUSSELL MID CA		X					PURCHASE	5/8/2009	193,004	257,559					
14	TYCO INTL		X					PURCHASE	5/29/2009	5,817	0					
15	JP MORGAN INTREPID AM		X					PURCHASE	6/15/2009	160,000	209,645					
16	JP MORGAN US LG CAP		X					PURCHASE	6/15/2009	530,000	716,284					
17	JP MORGAN US LG CAP		X					PURCHASE	7/28/2009	220,000	250,909					
18	MATTHEWS PAC TIGER FD		X					PURCHASE	9/15/2009	170,000	156,400					
19	JP MORGAN ASIA EQ FD		X					PURCHASE	9/15/2009	170,000	241,970					
20	JP MORGAN INTREP INTL		X					PURCHASE	9/15/2009	507,592	720,000					
21	SPDR TRUST SER 1		X					PURCHASE	9/15/2009	343,009	407,823					
22	PHILLIP MORRIS		X					PURCHASE	1/15/2009	1,066						
23	VANGUARD FIXED INC		X					PURCHASE	3/27/2009	389						
24																
25																
26																
27																
28																
29																
30																
31																
32																
33																
34																
35																

Part X, Lines 10a and 10b (990) - Land, Buildings, and Equipment

Category or Item		Land	Buildings	Leasehold Improvements	Equipment	Other	Check if Investment Asset	Check if Asset Disposed	Cost/Other Basis	Beginning Accumulated Depreciation	Ending Accumulated Depreciation	Disposals/ Adjustments	Beginning Balance	Ending Balance
1	BUILDING (HEADQUARTERS)		X						463,212	68,712	80,292		394,500	382,920
2	LAND	X						128,523	0	0	0		128,523	128,523
3	FURNISHINGS AND EQUIPMENT				X			195,328	169,729	177,087			25,599	18,241
4								0	0	0			0	0
5								0	0	0			0	0
6								0	0	0			0	0
7								0	0	0			0	0
8								0	0	0			0	0
9								0	0	0			0	0
10								0	0	0			0	0
11								0	0	0			0	0
12								0	0	0			0	0
13								0	0	0			0	0
14								0	0	0			0	0
15								0	0	0			0	0
16								0	0	0			0	0
17								0	0	0			0	0
18								0	0	0			0	0
19								0	0	0			0	0
20								0	0	0			0	0
21								0	0	0			0	0
22								0	0	0			0	0
23								0	0	0			0	0
24								0	0	0			0	0
25								0	0	0			0	0
26								0	0	0			0	0
27								0	0	0			0	0
28								0	0	0			0	0
29								0	0	0			0	0
30								0	0	0			0	0
31								0	0	0			0	0
32								0	0	0			0	0
33								0	0	0			0	0
34								0	0	0			0	0
35								0	0	0			0	0
36								0	0	0			0	0
37								0	0	0			0	0
38								0	0	0			0	0
39								0	0	0			0	0
40								0	0	0			0	0
41								0	0	0			0	0
42								0	0	0			0	0
43								0	0	0			0	0
44								0	0	0			0	0
45								0	0	0			0	0
46								0	0	0			0	0
47								0	0	0			0	0
48								0	0	0			0	0
49								0	0	0			0	0
50								0	0	0			0	0
51								0	0	0			0	0
52								0	0	0			0	0
53								0	0	0			0	0

787,063 238,441 257,379 0 548,622 529,684

Part X, Lines 11 and 12 (990) - Investments - Securities

Check one box below to indicate how securities are reported

- Cost
 End of year market value (FMV)

0 11,782,176 13,608,270

	Description	Check if Publicly Traded Securities?	Check if Financial Derivatives	Check if Closely-Held Equity Interests	Number of Shares/ Face Value	Value at Time of Donation	Beginning Balance Book Value FMV	Ending Balance Book Value FMV
1	REAL ESTATE INVESTMENT TRUSTS	X			0.00	0	1,541,446	1,424,313
2	VANGUARD TOTAL STOCK INDEX FUND	X			0.00	0	317,270	408,807
3					0.00	0	0	0
4	JPMORGAN CHASE-MONEY MARKET	X			0.00	0	881,666	782,063
5	JPMORGAN CHASE-STOCK MUTUAL FUNDS	X			0.00	0	5,699,954	8,243,984
6	JPMORGAN CHASE-BOND MUTUAL FUNDS	X			0.00	0	3,341,840	2,749,103
7					0.00	0	0	0
8					0.00	0	0	0
9					0.00	0	0	0
10					0.00	0	0	0
11					0.00	0	0	0
12					0.00	0	0	0
13					0.00	0	0	0
14					0.00	0	0	0
15					0.00	0	0	0
16					0.00	0	0	0
17					0.00	0	0	0
18					0.00	0	0	0
19					0.00	0	0	0
20					0.00	0	0	0
21					0.00	0	0	0
22					0.00	0	0	0
23					0.00	0	0	0
24					0.00	0	0	0
25					0.00	0	0	0
26					0.00	0	0	0
27					0.00	0	0	0
28					0.00	0	0	0
29					0.00	0	0	0
30					0.00	0	0	0

Part VI, Line 17 (990) - States with Which a Copy of this Form 990 is Required to be Filed

- | | | |
|---|---|--|
| <input type="checkbox"/> Armed Forces the Americas | <input type="checkbox"/> Louisiana | <input type="checkbox"/> Palau |
| <input type="checkbox"/> Armed Forces Europe | <input type="checkbox"/> Massachusetts | <input type="checkbox"/> Rhode Island |
| <input type="checkbox"/> Alaska | <input type="checkbox"/> Maryland | <input type="checkbox"/> South Carolina |
| <input type="checkbox"/> Alabama | <input type="checkbox"/> Maine | <input type="checkbox"/> South Dakota |
| <input type="checkbox"/> Armed Forces Pacific | <input type="checkbox"/> Marshall Islands | <input type="checkbox"/> Tennessee |
| <input type="checkbox"/> Arkansas | <input type="checkbox"/> Michigan | <input type="checkbox"/> Texas |
| <input type="checkbox"/> American Samoa | <input type="checkbox"/> Minnesota | <input type="checkbox"/> Utah |
| <input type="checkbox"/> Arizona | <input type="checkbox"/> Missouri | <input type="checkbox"/> Virginia |
| <input type="checkbox"/> California | <input type="checkbox"/> Commonwealth of the Northern Mariana Islands | <input type="checkbox"/> U.S. Virgin Islands |
| <input type="checkbox"/> Colorado | <input type="checkbox"/> Mississippi | <input type="checkbox"/> Vermont |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Montana | <input type="checkbox"/> Washington |
| <input type="checkbox"/> District of Columbia | <input type="checkbox"/> North Carolina | <input type="checkbox"/> Wisconsin |
| <input type="checkbox"/> Delaware | <input type="checkbox"/> North Dakota | <input type="checkbox"/> West Virginia |
| <input type="checkbox"/> Florida | <input type="checkbox"/> Nebraska | <input type="checkbox"/> Wyoming |
| <input type="checkbox"/> Federated States of Micronesia | <input type="checkbox"/> New Hampshire | |
| <input type="checkbox"/> Georgia | <input type="checkbox"/> New Jersey | |
| <input type="checkbox"/> Guam | <input type="checkbox"/> New Mexico | |
| <input type="checkbox"/> Hawaii | <input type="checkbox"/> Nevada | |
| <input type="checkbox"/> Iowa | <input checked="" type="checkbox"/> New York | |
| <input type="checkbox"/> Idaho | <input type="checkbox"/> Ohio | |
| <input type="checkbox"/> Illinois | <input type="checkbox"/> Oklahoma | |
| <input type="checkbox"/> Indiana | <input type="checkbox"/> Oregon | |
| <input type="checkbox"/> Kansas | <input checked="" type="checkbox"/> Pennsylvania | |
| <input type="checkbox"/> Kentucky | <input type="checkbox"/> Puerto Rico | |

PART IV, LINE 28B and PART VI, SECTION A, LINE 2

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Alice Skinner
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Vice-President
Secretary
Treasurer

Marlyn Smith
Alice Skinner
Dick Hatheway
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