Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

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

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

Use the IRS label Otherwise, print or type. See Specific Instructions.

Name of foundation: RICHARD LOUNSBERY FOUNDATION, INC.

A Employer identification number: 13-6081860

Number and street (or P O box number if mail is not delivered to street address): 1020 19TH STREET N.W. Room/suite: LL60

B Telephone number: 202-872-8080

City or town, state, and ZIP code: WASHINGTON, DC 20036

C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 20,288,605.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	1,720,000.		N/A	
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	5,596.	5,596.		
	4 Dividends and interest from securities	564,383.	564,383.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-547,183.			
	b Gross sales price for all assets on line 6a 2,498,765.				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income	219,014.	1,700.		STATEMENT 1
	12 **Total.** Add lines 1 through 11	1,961,810.	571,679.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	312,000.	39,000.		273,000.
	14 Other employee salaries and wages	69,000.	0.		69,000.
	15 Pension plans, employee benefits	94,083.	11,581.		82,502.
	16a Legal fees STMT 2	25,056.	0.		25,056.
	b Accounting fees STMT 3	15,764.	3,941.		11,823.
	c Other professional fees STMT 4	86,067.	78,517.		7,550.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion	374.	0.		
	20 Occupancy	22,462.	2,246.		20,216.
	21 Travel, conferences, and meetings	30,022.	0.		30,022.
	22 Printing and publications				
	23 Other expenses STMT 5	37,680.	3,578.		34,102.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	692,508.	138,863.		553,271.
	25 Contributions, gifts, grants paid	2,124,767.			2,124,767.
	26 **Total expenses and disbursements** Add lines 24 and 25	2,817,275.	138,863.		2,678,038.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-855,465.			
	b **Net investment income** (if negative, enter -0-)		432,816.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	200,430.	56,205.	56,205.
	2	Savings and temporary cash investments	1,802,718.	1,398,305.	1,398,305.
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 7	4,267,350.	3,420,339.	3,763,351.
	c	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other STMT 8	15,469,642.	16,010,200.	15,069,163.
	14	Land, buildings, and equipment: basis ▶ 3,745.			
		Less accumulated depreciation STMT 9 ▶ 3,745.	374.		
	15	Other assets (describe ▶ SECURITY DEPOSIT)	1,581.	1,581.	1,581.
	16	**Total assets** (to be completed by all filers)	21,742,095.	20,886,630.	20,288,605.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	21,742,095.	20,886,630.	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ [ ] and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances**	21,742,095.	20,886,630.	
	31	**Total liabilities and net assets/fund balances**	21,742,095.	20,886,630.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	21,742,095.
2	Enter amount from Part I, line 27a	2	-855,465.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	20,886,630.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	20,886,630.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES	P		
b	STATEMENT C	P		
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	2,320,842.		2,837,515.	-516,673.
b	177,923.		208,433.	-30,510.
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				-516,673.
b				-30,510.
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } 2 -547,183.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter -0- in Part I, line 8 3 N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	3,263,457.	20,981,782.	.155538
2007	3,316,891.	24,637,253.	.134629
2006	2,931,920.	23,210,116.	.126321
2005	3,475,653.	23,119,727.	.150333
2004	3,190,825.	22,126,963.	.144205

2	Total of line 1, column (d)	2	.711026
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.142205
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	18,267,200.
5	Multiply line 4 by line 3	5	2,597,687.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,328.
7	Add lines 5 and 6	7	2,602,015.
8	Enter qualifying distributions from Part XII, line 4	8	2,678,038.

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

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

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% of Part I, line 27b	1	4,328.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	4,328.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	**Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-	5	4,328.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 41,729.		
b	Exempt foreign organizations - tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	41,729.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	37,401.
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 37,401. **Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.RLOUNSBERY.ORG

14 The books are in care of ▶ MAX ANGERHOLZER Telephone no. ▶ 202-872-8080
Located at ▶ 1020 19TH STREET N.W. LL60, WASHINGTON, DC ZIP+4 ▶ 20036

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

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

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

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (**1**) any purchase by the foundation or disqualified persons after May 26, 1969; (**2**) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (**3**) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? STATEMENT E ☒ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X (No)

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		312,000.	53,608.	0.

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SALVE BERNABE 1020 19TH ST NW, WASHINGTON, DC 20036	ADMIN ASSISTANT 40.00	69,000.	12,420.	0.

Total number of other employees paid over $50,000 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(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 information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
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 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes:		
a	Average monthly fair market value of securities	1a	16,409,626.
b	Average of monthly cash balances	1b	2,134,174.
c	Fair market value of all other assets	1c	1,581.
d	**Total** (add lines 1a, b, and c)	1d	18,545,381.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	18,545,381.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	278,181.
5	**Net value of noncharitable-use assets** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	18,267,200.
6	**Minimum investment return** Enter 5% of line 5	6	913,360.

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

1	Minimum investment return from Part X, line 6	1	913,360.
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 4,328.		
b	Income tax for 2009 (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	4,328.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	909,032.
4	Recoveries of amounts treated as qualifying distributions	4	217,314.
5	Add lines 3 and 4	5	1,126,346.
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	1,126,346.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,678,038.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,678,038.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	4,328.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,673,710.

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) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,126,346.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years: ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008 831,555.				
f Total of lines 3a through e	831,555.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 2,678,038.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions) **	1,720,000.			
d Applied to 2009 distributable amount				958,038.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	168,308.			168,308.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,383,247.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	1,720,000.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	663,247.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009 663,247.				

** SEE STATEMENT 11

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

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

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

SEE STATEMENT 12

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE STATEMENT D	NONE			2,115,167.
THE FOUNDATION CENTER 79 FIFTH AVENUE NEW YORK, NY 10003	NONE	PUBLIC	ADMINISTRATIVE CONTRIBUTION	4,000.
PHILANTHROPY ROUNDTABLE 1150 17TH STREET, NW, SUITE 503 WASHINGTON, DC 20036	NONE	PUBLIC	ADMINISTRATIVE CONTRIBUTION	3,000.
COUNCIL ON FOUNDATIONS P.O. BOX 0021 WASHINGTON, DC 20056	NONE	PUBLIC	ADMINISTRATIVE CONTRIBUTION	2,600.
Total			▶ 3a	2,124,767.
b *Approved for future payment*				
AMERICAN PHILOSOPHICAL SOCIETY 104 SOUTH FIFTH STREET PHILADELPHIA, PA 19106	NONE	PUBLIC	VALENTINE/ DARWIN COLLECTION PROJECT	42,166.
Total			▶ 3b	42,166.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	5,596.	
4 Dividends and interest from securities			14	564,383.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	1,700.	
8 Gain or (loss) from sales of assets other than inventory			18	-547,183.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a RETURNED GRANTS			01	217,314.	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		241,810.	0.

13 Total Add line 12, columns (b), (d), and (e) 13 241,810.

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

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

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

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of.			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee | 5/14/10 Date | Secretary / Executive Director Title

Paid Preparer's Use Only

Preparer's signature	Date 5/13/10	Check if self-employed ☐	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code	LUTZ AND CARR, CPAS LLP 300 EAST 42ND STREET NEW YORK, NY 10017	EIN Phone no. 212-697-2299

Form 990-PF (2009)

923622
02-02-10

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2009

Name of the organization	Employer identification number
RICHARD LOUNSBERY FOUNDATION, INC.	13-6081860

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)

Name of organization	Employer identification number
RICHARD LOUNSBERY FOUNDATION, INC.	13-6081860

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	RICHARD LOUNSBERY FOUNDATION INC. TRUST C/O JP MORGAN, P.O. BOX 6089 NEWARK, DE 19714	$ 1,720,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1 990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction *
1	COMPUTERS	063004	SL	5.00	16	3,745.			3,745.	3,371.		374.
	* TOTAL 990-PF PG 1 DEPR					3,745.		0.	3,745.	3,371.	0.	374.

928102
06-24-09

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

FORM 990-PF OTHER INCOME STATEMENT 1

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CLASS LITIGATION SETTLEMENTS	1,700.	1,700.	
RETURNED GRANTS	217,314.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	219,014.	1,700.	

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PATTERSON, BELKNAP, WEBB & TYLER	25,056.	0.		25,056.
TO FM 990-PF, PG 1, LN 16A	25,056.	0.		25,056.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LUTZ AND CARR, CPA'S	15,764.	3,941.		11,823.
TO FORM 990-PF, PG 1, LN 16B	15,764.	3,941.		11,823.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOARD CONSULTANTS	2,550.	0.		2,550.
SANFORD, BERNSTEIN - INVESTMENT ADVISOR	35,594.	35,594.		0.
BUCK CONSULTANTS -FINANCIAL CONSULTANT	20,000.	15,000.		5,000.

COMMONFUND - INVESTMENT ADVISORS	27,923.	27,923.		0.
TO FORM 990-PF, PG 1, LN 16C	86,067.	78,517.		7,550.

FORM 990-PF OTHER EXPENSES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE STATIONERY AND SUPPLIES	8,873.	887.		7,986.
TELEPHONE	9,696.	970.		8,726.
MISCELLANEOUS	1,442.	144.		1,298.
MEMBERSHIP DUES	500.	0.		500.
FILING FEES	825.	0.		825.
COMPUTER SERVICES	5,762.	576.		5,186.
INSURANCE	6,087.	609.		5,478.
POSTAGE AND MESSENGER	3,921.	392.		3,529.
PENALTIES	574.	0.		574.
TO FORM 990-PF, PG 1, LN 23	37,680.	3,578.		34,102.

FOOTNOTES STATEMENT 6

PAGE 5, PART VII-B, LINE 1A(4)

ALL COMPENSATION PAID TO THE OFFICERS AND DIRECTORS WAS FOR THE PERFORMANCE OF PERSONAL SERVICES WHICH WERE REASONABLE AND NECESSARY TO CARRYING OUT THE EXEMPT PURPOSES OF THE FOUNDATION. SUCH COMPENSATION WAS APPROVED BY THE BOARD AND CONSIDERED TO BE REASONABLE AND COMMENSURATE WITH THE DUTIES AND RESPONSIBILITIES OF EACH OFFICER AND DIRECTOR.

FORM 990-PF CORPORATE STOCK STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT A	3,420,339.	3,763,351.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,420,339.	3,763,351.

FORM 990-PF OTHER INVESTMENTS STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT B	COST	16,010,200.	15,069,163.
TOTAL TO FORM 990-PF, PART II, LINE 13		16,010,200.	15,069,163.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 9

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTERS	3,745.	3,745.	0.
TOTAL TO FM 990-PF, PART II, LN 14	3,745.	3,745.	0.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DAVID M. ABSHIRE 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	PRESIDENT 40.00	105,000.	18,900.	0.
MAXMILLIAN ANGERHOLZER III 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	SECRETARY/EX DIRECTOR 40.00	141,000.	34,708.	0.
GLENN STREHLE 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	TREASURER 5.00	12,000.	0.	0.
WILLIAM HAPPER 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	VICE PRESIDENT 2.00	9,000.	0.	0.
JESSE H. AUSUBEL 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	DIRECTOR 2.00	9,000.	0.	0.
R. NICHOLAS BURNS 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	DIRECTOR 2.00	9,000.	0.	0.
HOMER NEAL 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	DIRECTOR 2.00	9,000.	0.	0.
RICHARD MCHENRY 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	DIRECTOR 2.00	9,000.	0.	0.
DAVID SABATINI 1020 19TH STREET N.W. LL60 WASHINGTON, DC 20036	DIRECTOR 2.00	9,000.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		312,000.	53,608.	0.

FORM 990-PF ELECTION UNDER REGULATIONS SECTION 53.4942(A)-3(D)(2) TO TREAT EXCESS QUALIFYING DISTRIBUTIONS AS DISTRIBUTIONS OUT OF CORPUS STATEMENT 11

PAGE 8, PART XIII - UNDISTRIBUTED INCOME - LINE 4(C)

THE FOUNDATION HEREBY ELECTS TO TREAT $1,720,000 AS A DISTRIBUTION OUT OF CORPUS TO SATISFY THE REQUIREMENTS IMPOSED BY SECTION 4942(H)(2). AN ELECTION IS HEREBY MADE PURSUANT TO REG. 53.4942(A)-3(D)(2) TO TREAT $1,720,000 AS A DISTRIBUTION OUT OF THE 2008 UNDISTRIBUTED INCOME AND OUT OF CORPUS.

BY: [signature] Secretary / Executive Director

DATE: 5/14/10

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 12
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

M. ANGERHOLZER
1020 19TH ST N.W., STE LL60
WASHINGTON, DC 20036

TELEPHONE NUMBER

202-872-8080

FORM AND CONTENT OF APPLICATIONS

NO SPECIAL FORM IS REQUIRED FOR APPLICATION. APPLICATION IS TO BE MADE IN WRITING SETTING FORTH THE NEED, NATURE AND THE AMOUNT OF THE REQUEST PLUS A BUDGET JUSTIFYING THE AMT. REQUESTED. ALSO, THE ORGANIZATION'S IRS 501(C)(3) DETERMINATION LETTER AND RELEVANT EXHIBITS SHOULD BE INCLUDED.

ANY SUBMISSION DEADLINES

GRANT PROPOSALS SHOULD BE SUBMITTED TO THE FOUNDATION NO LATER THAN SIX WEEKS PRIOR TO THE FIRST OF APRIL, JULY, OCTOBER OR JANUARY.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE MADE TO QUALIFYING ORGANIZATIONS ONLY AND NOT TO INDIVIDUALS.

RICHARD LOUNSBERY FOUNDATION, INC.
As of December 31, 2009
FORM 990PF EIN 13-6081860

Asset Class	Qty.	Description	Ticker	Avg. Unit Cost	Market Price	Total Cost	Market Value
Equities	275 000	ACE LTD	ACE	$ 42	$ 50	$ 11,548	$ 13,860
Equities	1,000 000	AETNA INC	AET	$ 26	$ 32	$ 25,561	$ 31,700
Equities	500 000	AIR PRODUCTS & CHEMICALS INC	APD	$ 84	$ 81	$ 41,983	$ 40,530
Equities	600.000	ALCON INC	ACL	$ 134	$ 164	$ 80,334	$ 98,610
Equities	1,000 000	ALTRIA GROUP INC	MO	$ 21	$ 20	$ 20,927	$ 19,630
Equities	50 000	AMAZON COM INC	AMZN	$ 76	$ 135	$ 3,799	$ 6,726
Equities	425 000	AMERIPRISE FINANCIAL INC	AMP	$ 39	$ 39	$ 16,421	$ 16,499
Equities	200 000	ANHEUSER-BUSH INBEV SPN ADR	BUD	$ 48	$ 52	$ 9,627	$ 10,406
Equities	200 000	AOL INC	AOL	$ 19	$ 23	$ 3,875	$ 4,656
Equities	75 000	APACHE CORP	APA	$ 114	$ 103	$ 8,531	$ 7,738
Equities	695 000	APPLE INC	AAPL	$ 110	$ 211	$ 76,640	$ 146,548
Equities	650 000	ARCELORMITTAL-NY REGISTERED	MT	$ 36	$ 46	$ 23,447	$ 29,738
Equities	875 000	ARCHER-DANIELS-MIDLAND CO	ADM	$ 27	$ 31	$ 23,430	$ 27,396
Equities	3,300 000	AT&T INC	T	$ 36	$ 28	$ 118,519	$ 92,499
Equities	2,550 000	BANK OF AMERICA CORP	BAC	$ 16	$ 15	$ 40,111	$ 38,403
Equities	250 000	BANK OF NEW YORK MELLON CORP	BK	$ 30	$ 28	$ 7,478	$ 6,993
Equities	250 000	BAXTER INTERNATIONAL INC	BAX	$ 58	$ 59	$ 14,422	$ 14,670
Equities	375 000	BROADCOM CORP-CL A	BRCM	$ 28	$ 31	$ 10,682	$ 11,794
Equities	425 000	BUNGE LTD	BG	$ 51	$ 64	$ 21,518	$ 27,128
Equities	700 000	CAMERON INTERNATIONAL CORP	CAM	$ 36	$ 42	$ 25,449	$ 29,260
Equities	1,500 000	CBS CORP-CLASS B	CBS	$ 7	$ 14	$ 10,536	$ 21,075
Equities	525 000	CELGENE CORP	CELG	$ 61	$ 56	$ 31,881	$ 29,232
Equities	275 000	CHEVRON CORP	CVX	$ 86	$ 77	$ 23,622	$ 21,172
Equities	375 000	CIMAREX ENERGY CO-W/I	XEC	$ 38	$ 53	$ 14,203	$ 19,864
Equities	1,825 000	CISCO SYSTEMS INC	CSCO	$ 26	$ 24	$ 46,798	$ 43,691
Equities	110 000	CME GROUP INC	CME	$ 518	$ 336	$ 56,937	$ 36,955
Equities	1,800 000	CONOCOPHILLIPS	COP	$ 62	$ 51	$ 112,234	$ 91,926
Equities	700 000	CONSTELLATION	STZ	$ 14	$ 16	$ 9,575	$ 11,151
Equities	325 000	COOPER INDUSTRIES PLC-CL A	CBE	$ 39	$ 43	$ 12,721	$ 13,858
Equities	800 000	COSTCO WHOLESALE CORP	COST	$ 58	$ 59	$ 46,311	$ 47,336
Equities	125 000	COVIDIEN PLC	COV	$ 47	$ 48	$ 5,888	$ 5,986
Equities	600 000	CREDIT SUISSE GROUP-SPON AD	CS	$ 49	$ 49	$ 29,478	$ 29,496
Equities	600.000	DANAHER CORP	DHR	$ 60	$ 75	$ 35,857	$ 45,120
Equities	550 000	DEAN FOODS CO	DF	$ 18	$ 18	$ 9,958	$ 9,922
Equities	600 000	DEUTSCHE BANK AG-REGISTERED	DB	$ 62	$ 71	$ 36,911	$ 42,546
Equities	900 000	DEVON ENERGY CORPORATION	DVN	$ 64	$ 74	$ 57,864	$ 66,150
Equities	2,100 000	EMC CORP/MASS	EMC	$ 16	$ 17	$ 34,495	$ 36,687
Equities	125 000	FEDEX CORP	FDX	$ 68	$ 83	$ 8,533	$ 10,431
Equities	2,200 000	FORD MOTOR CO	F	$ 8	$ 10	$ 16,752	$ 22,000
Equities	300 000	FRANKLIN RESOURCES INC	BEN	$ 113	$ 105	$ 33,980	$ 31,605
Equities	475 000	FREEPORT-MCMORAN COPPER	FCX	$ 66	$ 80	$ 31,499	$ 38,138
Equities	2,400 000	GENERAL ELECTRIC CO	GE	$ 16	$ 15	$ 38,929	$ 36,312
Equities	125 000	GENERAL MILLS INC	GIS	$ 65	$ 71	$ 8,181	$ 8,851
Equities	1,600 000	GILEAD SCIENCES INC	GILD	$ 35	$ 43	$ 56,564	$ 69,248
Equities	1,100 000	GOLDMAN SACHS GROUP INC	GS	$ 121	$ 169	$ 132,916	$ 185,724
Equities	241 000	GOOGLE INC-CL A	GOOG	$ 401	$ 620	$ 96,689	$ 149,415
Equities	1,521.000	HEWLETT-PACKARD CO	HPQ	$ 43	$ 52	$ 64,744	$ 78,347
Equities	550 000	HOME DEPOT INC	HD	$ 27	$ 29	$ 14,858	$ 15,912
Equities	1,100.000	HUNTSMAN CORP	HUN	$ 11	$ 11	$ 11,702	$ 12,419
Equities	1,100.000	ILLINOIS TOOL WORKS	ITW	$ 42	$ 48	$ 46,423	$ 52,789
Equities	1,500 000	INGERSOLL-RAND PLC	IR	$ 32	$ 36	$ 47,717	$ 53,610
Equities	4,000 000	INTEL CORP	INTC	$ 17	$ 20	$ 69,097	$ 81,600
Equities	750 000	J C PENNEY CO INC	JCP	$ 20	$ 27	$ 15,343	$ 19,958
Equities	1,200 000	JOHNSON CONTROLS INC	JCI	$ 27	$ 27	$ 31,897	$ 32,688
Equities	3,850 000	JPMORGAN CHASE & CO	JPM	$ 38	$ 42	$ 145,540	$ 160,430
Equities	425.000	KLA-TENCOR CORPORATION	KLAC	$ 35	$ 36	$ 14,873	$ 15,368
Equities	950.000	KOHLS CORP	KSS	$ 41	$ 54	$ 39,184	$ 51,234
Equities	1,000 000	LIMITED BRANDS INC	LTD	$ 8	$ 19	$ 8,468	$ 19,240
Equities	270 000	LOWE'S COS INC	LOW	$ 19	$ 23	$ 5,157	$ 6,315
Equities	1,400 000	MACY'S INC	M	$ 28	$ 17	$ 38,520	$ 23,464

STATEMENT A

RICHARD LOUNSBERY FOUNDATION, INC.
As of December 31, 2009
FORM 990PF EIN 13-6081860

Asset Class	Qty.	Description	Ticker	Avg. Unit Cost	Market Price	Total Cost	Market Value
Equities	300 000	MEDCO HEALTH SOLUTIONS INC	MHS	$ 45	$ 64	$ 13,382	$ 19,173
Equities	2,097 000	MERCK & CO. INC	MRK	$ 36	$ 37	$ 74,487	$ 76,624
Equities	275 000	METLIFE INC	MET	$ 24	$ 35	$ 6,698	$ 9,721
Equities	2,900 000	MICRON TECHNOLOGY INC	MU	$ 7	$ 11	$ 19,419	$ 30,624
Equities	700 000	MICROSOFT CORP	MSFT	$ 29	$ 30	$ 20,183	$ 21,343
Equities	1,000 000	MORGAN STANLEY	MS	$ 40	$ 30	$ 39,669	$ 29,600
Equities	2,300 000	MOTOROLA INC	MOT	$ 9	$ 8	$ 19,601	$ 17,848
Equities	225 000	NATIONAL - OILWELL INC	NOV	$ 37	$ 44	$ 8,367	$ 9,920
Equities	4,650 000	NEWS CORP	NWSA	$ 6	$ 14	$ 29,663	$ 63,659
Equities	700 000	NEXEN INC	NXY	$ 24	$ 24	$ 16,813	$ 16,751
Equities	1,800 000	NOKIA CORP-SPON ADR	NOK	$ 14	$ 13	$ 24,316	$ 23,130
Equities	600 000	NORTHROP GRUMMAN CORP	NOC	$ 45	$ 56	$ 27,071	$ 33,510
Equities	550 000	OCCIDENTAL PETROLEUM CORP	OXY	$ 69	$ 81	$ 38,009	$ 44,743
Equities	3,100 000	OFFICE DEPOT INC	ODP	$ 6	$ 6	$ 19,423	$ 19,995
Equities	650 000	PEPSICO INC	PEP	$ 57	$ 61	$ 36,791	$ 39,520
Equities	5,300 000	PFIZER INC	PFE	$ 23	$ 18	$ 122,944	$ 96,407
Equities	350 000	PRINCIPAL FINANCIAL GROUP	PFG	$ 29	$ 24	$ 10,059	$ 8,414
Equities	1,675.000	QUALCOMM INC	QCOM	$ 42	$ 46	$ 70,368	$ 77,486
Equities	450 000	QUANTA SERVICES INC	PWR	$ 23	$ 21	$ 10,479	$ 9,378
Equities	1,500 000	RRI ENERGY INC	RRI	$ 10	$ 6	$ 14,459	$ 8,580
Equities	1,300 000	SCHLUMBERGER LTD	SLB	$ 70	$ 65	$ 90,536	$ 84,617
Equities	700 000	SMITHFIELD FOODS INC	SFD	$ 14	$ 15	$ 9,832	$ 10,633
Equities	12,000 000	SPRINT NEXTEL CORP	S	$ 6	$ 4	$ 77,853	$ 43,920
Equities	350 000	SUNCOR ENERGY INC	SU	$ 38	$ 35	$ 13,432	$ 12,359
Equities	1,400 000	SUPERVALU INC	SVU	$ 15	$ 13	$ 21,455	$ 17,794
Equities	1,900 000	SYMANTEC CORP	SYMC	$ 15	$ 18	$ 28,464	$ 33,991
Equities	900 000	TARGET CORP	TGT	$ 44	$ 48	$ 39,257	$ 43,533
Equities	875 000	TEVA PHARMACEUTICAL-SP ADR	TEVA	$ 45	$ 56	$ 39,448	$ 49,158
Equities	500 000	TEXTRON INC	TXT	$ 9	$ 19	$ 4,416	$ 9,405
Equities	425 000	THE WALT DISNEY CO	DIS	$ 18	$ 32	$ 7,596	$ 13,706
Equities	1,155 000	TIME WARNER CABLE	TWC	$ 33	$ 41	$ 38,079	$ 47,805
Equities	1,775 000	TIME WARNER INC	TWX	$ 21	$ 29	$ 37,497	$ 51,724
Equities	375 000	TOTAL SA-SPON ADR	TOT	$ 82	$ 64	$ 30,917	$ 24,015
Equities	425 000	TRAVELERS COS INC/THE	TRV	$ 52	$ 50	$ 22,086	$ 21,191
Equities	2,000 000	TYCO ELECTRONICS LTD	TEL	$ 19	$ 25	$ 37,100	$ 49,100
Equities	175 000	UNITED PARCEL SERVICE-CL B	UPS	$ 59	$ 57	$ 10,399	$ 10,040
Equities	550 000	UNUM GROUP	UNM	$ 18	$ 20	$ 9,709	$ 10,736
Equities	375 000	VALE SA-SP ADR	VALE	$ 30	$ 29	$ 11,074	$ 10,886
Equities	250 000	VERTEX PHARMACEUTICALS INC	VRTX	$ 41	$ 43	$ 10,191	$ 10,713
Equities	200 000	VISA INC - CLASS A SHRS	V	$ 65	$ 87	$ 13,020	$ 17,492
Equities	900 000	VODAFONE GROUP PLC-SP ADR	VOD	$ 19	$ 23	$ 17,177	$ 20,781
Equities	250 000	WAL-MART STORES INC	WMT	$ 52	$ 53	$ 13,071	$ 13,363
Equities	900 000	WELLS FARGO & COMPANY	WFC	$ 28	$ 27	$ 24,852	$ 24,291
Equities	675 000	WESTERN DIGITAL CORP	WDC	$ 30	$ 44	$ 20,291	$ 29,801
Equities	1,300 000	XL CAPITAL LTD -CLASS A	XL	$ 26	$ 18	$ 33,251	$ 23,829
		NET PORTFOLIO VALUE				$ 3,420,339	$ 3,763,351

STATEMENT A

RICHARD LOUNSBERY FOUNDATION
F/Y/E: 12/31/09
FORM 990PF
EIN# 13-6081860

MUTUAL FUNDS

Security Description	Number of shares	Cost Basis 12/31/2009	Market Value 12/31/2009
Bernstein Intermediate Duration Institutional Portfolio	4,565,740 000	4,698,360	4,565,746
Bernstein International Portfolio	62,743 250	996,290	949,305
Bernstein Emerging Markets Portfolio	11,525 424	296,087	335,044
Bernstein Global Real Estate Invt Fund	48,028 739	423,735	379,427
CFI Multi-Strategy Equity Fund	530,072 860	6,515,404	5,830,801
CFI Multi-Strategy Bond Fund LLC	289,589 935	3,080,324	3,008,839
		16,010,200	15,069,163

RICHARD LOUNSBERY FOUNDATION
F/Y/E: 12/31/2009
FORM 990PF
EIN# 13-6081860

Security Description	Date Sold	shares	Sales Proceeds	Cost	Gain/Loss
CFI Multi-Strategy Equity Fund	2/09	-178 194	1,389 91	(2,197 69)	(807 78)
	3/09	-160 895	1,163 27	(1,984 34)	(821 07)
	4/09	-178 771	1,380 11	(2,204 81)	(824 70)
	5/09	-172 920	1,473 28	(2,132 65)	(659 37)
	6/09	-178 626	1,634 43	(2,203 02)	(568 59)
	7/09	-173 565	1,577 71	(2,140 60)	(562 89)
	8/09	-178 024	1,737 51	(2,195 60)	(458 09)
	9/09	-176 681	1,777 41	(2,179 03)	(401 62)
	10/09	-169 673	1,778 17	(2,092 60)	(314 43)
	11/09	-176 189	1,804 18	(2,172 97)	(368 79)
	12/09	-168.558	1,812 00	(2,078 85)	(266 85)
	12/09	-173 725	1,910 98	(2,142 58)	(231 60)
					-
CFI Multi-Strategy Bond Fund LLC	3/09	16,251 35	150,000 00	(173,541 72)	(23,541 72)
	2/09	-74 289	698 32	(793 30)	(94 98)
	3/09	-67 082	620 51	(716 34)	(95 83)
	4/09	-75 299	695 01	(804 09)	(109 08)
	5/09	-68 837	647 76	(735 08)	(87 32)
	6/09	-71 114	689 81	(759 40)	(69 59)
	7/09	-69 727	675 65	(744 59)	(68 94)
	8/09	-72 009	717 21	(768 96)	(51 75)
	9/09	-71 99	736 46	(768 75)	(32 29)
	10/09	-70 667	726 46	(754 62)	(28 16)
	11/09	-72 963	762 46	(779 14)	(16 68)
	12/09	-70 591	747 56	(753 81)	(6 25)
		-73 839	767 19	(788 50)	(21 31)
		Grand Total	177,923.36	(208,433.05)	(30,509.69)

RICHARD LOUNSBERY FOUNDATION
FYE: 12/31/2009
EIN# 13-6081860
FORM 990PF

STATEMENT D

	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
February 4, 2009	The Character Education Partnership 1025 Connecticut Avenue, NW, Suite 1011 Washington, DC 20036-5548	Public	General Operating Expenses	1,000
February 4, 2009	The Institute for Global Ethics P.O. Box 563 Camden, Maine 04843	Public	General Operating Expenses	1,000
February 4, 2009	Washington International Piano Arts Council 3862 Farrcroft Drive Fairfax, Virginia 22030	Public	General Operating Expenses	1,000
February 5, 2009	Research Foundation of the City University of New York York College - City University of New York 94-20 Guy R. Brewer Boulevard Jamaica, New York 11451	Public	New Tools in Diplomacy: Environmental Change, Conservation, and Conflict	2,500
February 20, 2009	New America Foundation 1630 Connecticut Avenue, NW 7th Floor Washington, DC 20009	Public	Nuclear Strategy and Nonproliferation Initiative	12,000
March 3, 2009	American Association for the Advancement of Science 1200 New York Avenue, NW Washington, DC 20005	Public	U S - Iran Science Diplomacy Workshop	3,500
March 2, 2009	The University of the South 735 University Avenue Sewanee, Tennessee 37383-1000	Public	The Sesquicentennial History of the University of the South	7,500
March 17, 2009	Mount Vernon Ladies' Association P.O Box 110 Mount Vernon, Virginia 22121	Public	General Operating Expenses	5,000
April 2, 2009	The Brookings Institution 1775 Massachusetts Avenue, NW Washington, DC 20036-2481	Public	U.S. - Iran Science Diplomacy Workshop	6,500
May 12, 2009	Marine Biological Laboratory 7 MBL Street Woods Hole, Massachusetts 02543	Public	Marine Education Program	5,000

	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
May 20, 2009	International Foundation for Entrepreneurship, Science and Technology iFest 1006 East 2700 South Salt Lake City, Utah 84106	Public	U.S - China - India International Innovation Camp	5,000
July 10, 2009	Oceanites P O Box 15259 Chevy Chase, Maryland 20825	Public	General Operating Expenses	10,000
July 10, 2009	Meadan, Inc 1255 Post Suite 540 San Francisco, California 94109	Public	General Operating Expenses	10,000
July 20, 2009	The New School 68 5th Avenue, Room 200 New York, New York 10011	Public	Parsons Institute for Information Mapping	5,000
July 28, 2009	Bipartisan Policy Center 1225 Eye Street, NW, Suite 1000 Washington, DC 20005	Public	National Security Preparedness	12,000
October 7, 2009	Harvard University Jefferson Laboratory 359 Cambridge, Massachusetts 02138	Public	Survival After Diagnosis of Cancer	10,000
October 7, 2009	The Community Foundation Boulder County 1123 Spruce Street Boulder, Colorado 80302	Public	Gilbert White Memorial Fund	1,000
October 8, 2009	Fund for Park Avenue 300 Park Avenue Suite 1700 New York, New York 10022	Public	General Operating Expenses	500
October 8, 2009	Harvard University 17 Oxford Street Cambridge, Massachusetts 02138	Public	Hydrosols and Albedo	3,000
October 9, 2009	Corcoran Gallery of Art 500 17th Street, NW Washington, DC 20006	Public	Women's Committee	10,000
November 19, 2009	George C. Marshall Research Foundation PO Drawer 1600 Lexington, Virginia 24450	Public	General Operating Expenses	5,000

	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
November 19, 2009	Science & Environmental Policy Project 1600 South Eads Street, # 712-S Arlington, Virginia 22202-3907	Public	General Operating Expenses	3,000
December 2, 2009	Weill Cornell Medical College 435 East 70th Street, Suite 4-J New York, New York 10021	Public	CP Snow Project	5,000
December 2, 2009	Georgetown University 301 Intercultural Center Washington, DC 20057	Public	Georgetown Journal of International Affairs	5,000
December 2, 2009	The University of the South 735 University Avenue Sewanee, Tennessee 37383-1000	Public	The Sesquicentennial History of the University of the South	12,000
December 17, 2009	The Swiss Society of New York 500 Fifth Avenue, Suite 1800 New York, New York 10110	Public	Albert Gallatin 250th Anniversary Book Project	10,000
December 17, 2009	Baylor School 171 Baylor School Road Chattanooga, Tennessee 37405	Public	General Operating Expenses	5,000
			TOTAL	156,500

April 30, 2009				
	American Association for the Advancement of Science 1200 New York Avenue NW Washington, DC 20005	Public	Syrian Science Diplomacy Fellow	58,190
	U.S. Civilian Research & Development Foundation 1530 Wilson Boulevard, Suite 300 Arlington, Virginia 22209	Public	U.S Syria Framework for Scientific Collaboration on Water and Agriculture Workshop	109,711
	Partnership for a Secure America 2000 P Street NW, Suite 505 Washington, DC 20036	Public	Science Diplomacy Initiative	45,000
	National Geographic Society 1145 17th Street NW Washington, DC 20036	Public	Oceanus	76,521

RICHARD LOUNSBERY FOUNDATION
FYE: 12/31/2009
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	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
	Wikimedia Foundation P.O. Box 78350 San Francisco, California 94107	Public	Travel Grants and Scholarships	50,000
	New York University School of Medicine Bellevue Hospital Center 462 First Avenue, C&D - 738 New York, New York 10016-9196	Public	Program for Survivors of Torture	80,000
	The American Revolution Center 1101 17th Street NW, Suite 610 Washington, DC 20036	Public	Les Seminars Discourses on France and America	50,000
	Association Francaise de Gemmologie 7, RUE Cadet 75009 Paris, France	Foreign **STATEMENT E**	Early Impact Scars Project	57,500
			Total Grants Disbursed	**526,922**

July 30, 2009				
	French-American Cultural Foundation 4101 Reservoir Road, NW Washington, DC 20007	Public	Oceans	99,000
	University of New Hampshire 51 College Road, Room A115 Durham, New Hampshire 03824	Public	Drawn from the Sea	89,620
	American Association for the Advancement of Science 1200 New York Avenue NW Washington, DC 20005	Public	Scientific Engagement with Myanmar (Burma)	50,000
	Meridian International Center 1630 Crescent Place, NW Washington, DC 20009	Public	The Role of Women in Science	25,000
	University of Louisiana-Lafayette Foundation P.O. Box 44290 Lafayette, Louisiana 70504-4290	Public	21st Century Digital Workforce	35,000

	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
	University of Michigan 2216 LSA Building 500 South State Street Ann Arbor, Michigan 48109-1382	Public	Study Abroad Program	57,500
	Montshire Museum of Science One Montshire Road Norwich, Vermont 05055	Public	DNA/RNA/Amino Acid Model	45,000
	The University of British Columbia 6303 N.W. Marine Drive Vancouver, BC Canada V6T 1Z1	Public	Faculty Politics	59,681
			Tota Grants Disbursed	**460,801**

October 22, 2009				
	Smithsonian Institution 1000 Jefferson Drive, SW, 4th Floor MRC 035 P.O. Box 37012 Washington, DC 20013-7012	Public	Joseph Henry and the Early History of the Smithsonian Institution	100,000
	American Philosophical Society 104 South Fifth Street Philadelphia, Pennsylvania 19106	Public	Valentine/Darwin Collection Project	42,166
	Institute of International Education 809 United Nations Plaza New York, New York 10017	Public	Iraq Scholar Lecture Series Distribution Program: Returning Education to Iraq	100,000
	Rice University James A. Baker III Institute for Public Policy MS 40 P.O. Box 1892 Houston, Texas 77251-1892	Public	James A. Baker III Institute for Public Policy: Stem Cell Research in the Middle East	25,000
	University of Southern California Viterbi School of Engineering OHE 200C Los Angeles, California 90089-1450	Public	A Roundtable of U.S. - Iran Aviation Safety Policymakers and Professionals	80,650

	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
	Center for Strategic and International Studies 1800 K Street, NW Washington, DC 20006	Public	Roundtable on U.S. - Africa Scientific Cooperation on Agriculture	75,000
	Global Knowledge Initiative c/o Sara E. Farley National Academy of Sciences, Suite 046 2101 Constitution Avenue, NW Washington, DC 21001	Public	Secretariat Costs	75,000
	Cold Spring Harbor Laboratory Dolan DNA Learning Center 1 Bungtown Road Cold Spring Harbor, New York 11724	Public	Biotechnology Footlocker Program	75,000
	Dos Pueblos Engineering Academy Foundation P.O. Box 313 Goleta, California 93116	Public	Building the STEM Pipeline	94,800
	Institut des Etudes Scientifiques Le Bois-Marie 35 route de Chartres F-91440 Bures-sur-Yvette, France	Foreign **STATEMENT E**	Interdisciplinary Workshop on Pattern Formation in Morphogenesis	32,050
February 27, 2009	Academie des Sciences 23 quai de Conti 75006 Paris France	Foreign **STATEMENT E**	Lounsbery Award	61,100
April 8, 2009	Academie des Sciences 23, quai de Conti 75006 Paris France	Foreign **STATEMENT E**	Lounsbery Award	20,000
March 3, 2009	The National Academy of Sciences Executive Office, NAS 285 500 Fifth Street, NW Washington, DC 20001	Public	Lounsbery Award	32,354

RICHARD LOUNSBERY FOUNDATION
FYE: 12/31/2009
EIN# 13-6081860
FORM 990PF

	Name of Organization	IRS STATUS CODE	Name of Project	Grants Paid
June 17, 2009	The National Academy of Sciences Executive Office, NAS 285 500 Fifth Street, NW Washington, DC 20001	Public	Lounsbery Award	50,000
			Total Grants Disbursed	**863,119**

Previously Approved Grants Disbursed in 2009

February 4, 2009	Boston University 640 Commonwealth Avenue Boston, Massachusetts 02215	Public	Improving Public Understanding of Risk in a Increasingly Scientific and Technological Era	34,000
October 16, 2009	Empire State College Foundation 28 Union Avenue Saratoga Springs, New York 12866	Public	Stem Cell Research Survey	40,000
October 20, 2009	Wilson College 1015 Philadelphia Avenue Chambersburg, Pennsylvania 17201	Public	Wilson Insitute for Women and Girls in Science, Mathematics, and Technology	33,825
		Total of Previously Approved Grants Disbursed in 2009		**107,825**

GRAND TOTAL **2,115,167**

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Association Francaise de Gemmologie** 7, rue Cadet 75009 Paris France
Purpose of Grant:	Early Impact Scars Project
Amount Paid:	$57,500
Date of Payment:	July 10, 2009
Report Date:	We expect to receive the report by the end of 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

STATEMENT E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Institut des Hautes Etudes Scientifiques** Le Bois-Marie 35 Route de Chartres 91440 Bures-sur-Yvette France
Purpose of Grant:	Interdisciplinary Workshop on Pattern Formation in Morphogenesis
Amount Paid:	$32,050
Date of Payment:	November 5, 2009
Report Date:*	February 18, 2010

*The report was found to be in order. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

STATEMENT E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Academie des Sciences** 23, quai de Conti 75006 Paris France
Purpose of Grant:	Lounsbery Medal
Amount Paid:	$61,100
Date of Payment:	February 27, 2009
Report Date:*	March 17, 2009

*The report was found to be in order. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

STATEMENT E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Academie des Sciences** 23, quai de Conti 75006 Paris France
Purpose of Grant:	Lounsbery Medal
Amount Paid:	$20,000
Date of Payment:	April 8, 2009
Report Date:*	April 1, 2009

*The report was found to be in order. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

STATEMENT E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Israeli-Palestinian Science Organization** c/o ACBP 1 Marcus Street Jerusalem, 92232 Israel
Purpose of Grant:	Operating Support for Research Projects
Amount Paid:	$75,000
Date of Payment:	May 29, 2008
Report Date:*	May 12, 2010

*The report was found to be in order. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Sapir Academic College** D.N. Hof Ashkelon 79165 Israel
Purpose of Grant:	Research Methods in Conflict Zones
Amount Paid:	$97,345.00
Date of Payment:	November 10, 2008
Report Date:	We received an interim report dated May 12, 2010 and expect to receive another report by the end of 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Fundacion Instituto de Biologia y Medicina Experimental** Vuelta de Obligado 2490 PB C1428ADN-Ciudad Autonoma de Bs.As. Argentina
Purpose of Grant:	Barcoding the Birds of Argentina: Phase II
Amount Paid:	$49,500
Date of Payment:	September 5, 2008
Report Date:	We expect to receive the report by the end of May 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Pro-Natura International** 15, avenue de Segur 75007 Paris France
Purpose of Grant:	Marine Fauna and Flora of the Indian Ocean
Amount Paid:	$146,000
Date of Payment:	December 5, 2008
Report Date:	We received an interim report dated March 28, 2010 and expect to receive another report by the end of 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**World Federation of Scientists** ICSC – World Laboratory CERN, Building 29 1211 Geneva 23 Switzerland
Purpose of Grant:	Cooperation & Optimization of Resources in Israel, the Palestinian Territories, and the Broader Middle East
Amount Paid:	$99,330
Date of Payment:	December 3, 2008
Report Date:	We expect to receive the report by the end of May 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Royal United Services Institute for Defence and Security Studies** Whitehall London SW1AET United Kingdom
Purpose of Grant:	France and NATO: Fresh Views with the New French Presidency?
Amount Paid:	$41,000
Date of Payment:	January 21, 2008
Report Date:*	May 12, 2010

*The report was found to be in order. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**France-Ameriques** 9-11, Avenue Franklin Roosevelt 75008 Paris France
Purpose of Grant:	France and NATO. Fresh Views with the New French Presidency?
Amount Paid:	$29,000
Date of Payment:	January 22, 2008
Report Date:	We expect to receive the report by the end of May 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Royal Institute of International Affairs** Chatham House 10 St. James Square London SW1Y 4LE
Purpose of Grant:	Micro-Proliferation Project
Amount Paid:	$12,000
Date of Payment:	January 22, 2008
Report Date:	We expect to receive the report by the end of May 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**The PS 6 Foundation** 928 Broadway Suite 505 New York, New York 10010
Purpose of Grant:	P.S. 6 Eric Dutt Eco-Center
Amount Paid:	$1,000
Date of Payment:	May 2, 2008
Report Date:	We expect to receive the report by the end of May 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E

EXPENDITURE RESPONSIBILITY REPORT

Organization:	**Planete Mer** 14, avenue de Messine 75008 Paris France
Purpose of Grant:	To support oceanographic science research.
Amount Paid:	$5,000
Date of Payment:	June 25, 2008
Report Date:	We expect to receive the report by the end of May 2010. To the knowledge of the Lounsbery Foundation, the grantee has not diverted any of the funds from the purpose of the grant.

ST. E