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Form **990-PF**

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

OMB No 1545-0052

2009

Department of the Treasury Internal Revenue Service

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

For calendar year 2009, or tax year beginning , 2009, and ending ,											
G Ch	eck a	all that apply	Initial r	eturn Init	ıal Return d	of a former p	ublic charity			F	ınal return
		-	Amend	led return		Address	hange [Nar	ne d	change	
Use	he	<u> </u>							A	Employer identification	number
IRS la	bel.	Alison Fo		n						20-0226054	
Otherv prin		42 Surfso	ng Rd						В	Telephone number (see t	he instructions)
or ty		Kiawah Is	land, S	C 29455						843-768-524	6
See Sp									C	If exemption application	ıs pending, check here 🟲 📘
Instruc	ions.								D	1 Foreign organizations, c	heck here.
H (k type of organi		X Section 50						2 Foreign organizations m	eeting the 85% test, check
	S	ection 4947(a)(1	1) nonexem					tion	_	here and attach compute	
I F	air ma	arket value of all ass	sets at end of y	year J Acc		ethod: XC	ash 🔲 Acc	rual	E	If private foundation sta under section 507(b)(1):	(A), check here
		Part II, column (c), II	-		Other (specify				F	If the foundation is in a	60-month termination
► \$			8,428.		column (a) must be or	cash basis)			under section 507(b)(1)	(B), check here.
Part I		nalysis of R			(a) Rev	enue and	(b) Net inve	estme	nt	(c) Adjusted net	(d) Disbursements
	E	Expenses (Th	ne total of a	mounts in	expénses	s per books	incom	ne		income	for charitable
	s	columns (b), (c), arily equal the	amounts in	column (a)							purposes (cash basis only)
	(see the instruct	ions))			·				ļ	
	1	Contributions, gift	-	•						 	
	3			req to att Sch B				•			
	3	cash investm	ents	emporary		1,848.	•	1,84	8.	1,848	
	4	Dividends and in	terest from sec	curities		234,176.	23	4,17	6.	234,176	
	5	a Gross rents									
		b Net rental income or (loss)	·								
R		a Net gain/(loss) fro				68,755.					
E	_	b Gross sales price assets on line 6a		417,742.							
E	7	Capital gain net in							0.		
N (9	Net short ten	n capital ga	iin							
E		a Gross sales less-	1				·	,			
8.	L^{T}	returns and allowances	SC								
4	Ž.	b LHE Cost of 2									
*	7 7 7	c Gross profit/(los									
\ \		OGDEN.		edule)							
Į.											
	12				1	67,269.	230	<u>6,02</u>	4.	236,024	•
	13					0.					
	14	_ ' '.		-		-	·-·				
_	1	a Legal fees (attach		benents							
A D M		b Accounting fees (See St 1		1,025.		51	3		512.
- 1	ı	c Other prof fees (a	-	000 00 1		1,020.			<u> </u>		
O I		Interest	u								
ET	18)(see mstr) S	ee Stm 2		250.					250.
OPERATING	19	Depreciation	(attach	_							
;		sch) and depl	letion								
N V	20 21		ranges and	mootings							
<u>.</u>	22										
JA EXP	23	•									
É				tement 3		245.		24	5.		
N S E S	24	Total operation	ng and adm	inistrative		1 500			0		7.00
, š	2-	expenses. Ad	ld lines 13 t	hrough 23	<u> </u>	1,520.		75	<u>8.</u>		762. 317,250.
I	25				3	317,250.				 	317,230.
	26	Total expense Add lines 24	es and disb and 25	ursements.] 3	18,770.		75	8.	l o	. 318,012.
=	27	Subtract line		e12:	<u> </u>						
-		a Excess of rev	enue over	expenses		E1 F01				_	
		and disburse			-1	51,501.	221	5,26	6		
	l	b Net investment in			ļ. 			J, 20	<u>.</u>	236,024	
		C Adjusted net inco	me (if negative,	, enter -U-)	<u> </u>					230,024	-

Part III Balance Sheets Statistics of engage to the engage of the	Form	990	-PF (2009) Alison Foundation		20-022	26054 Page 2
Cash - non interest Searing Cash - non interest Searing	Davi	F H	Raiance Charte Attached schedules and amounts in the description	Beginning of year		
2 Savings and temporary cash investments 3 Aboutins receivable Less: allowance for doubtful accounts b Less: allowance for doubtful accounts b Less: allowance for doubtful accounts b Carnots receivable Less: allowance for doubtful accounts b Less: accountable bords (datas stredule) Less: accountable bords (datas stredule) Less: accountable bords (datas stredule) Less: accountable directable (datas accountable dir	- ar	111	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
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R S 30 Total net assets or fund balances (see the instructions) 31 Total liabilities and net assets/fund balances (see the instructions) 32 Total net assets or fund balances (see the instructions) 33 Total liabilities and net assets/fund balances (see the instructions) 34 Analysis of Changes in Net Assets or Fund Balances 35 Enter amount from Part I, line 27a 36 Other increases not included in line 2 (itemize) 46 Add lines 1, 2, and 3 56 Decreases not included in line 2 (itemize) 57,007,241. 6,855,740. 7,007,241. 6,855,740.	D	26				
R S 30 Total net assets or fund balances (see the instructions) 31 Total liabilities and net assets/fund balances (see the instructions) 32 Total net assets or fund balances (see the instructions) 33 Total liabilities and net assets/fund balances (see the instructions) 34 Analysis of Changes in Net Assets or Fund Balances 35 Enter amount from Part I, line 27a 36 Other increases not included in line 2 (itemize) 46 Add lines 1, 2, and 3 56 Decreases not included in line 2 (itemize) 57,007,241. 6,855,740. 7,007,241. 6,855,740.	SB		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
R S 30 Total net assets or fund balances (see the instructions) 31 Total liabilities and net assets/fund balances (see the instructions) 32 Total net assets or fund balances (see the instructions) 33 Total liabilities and net assets/fund balances (see the instructions) 34 Analysis of Changes in Net Assets or Fund Balances 35 Enter amount from Part I, line 27a 36 Other increases not included in line 2 (itemize) 46 Add lines 1, 2, and 3 56 Decreases not included in line 2 (itemize) 57,007,241. 6,855,740. 7,007,241. 6,855,740.	E L	27	Capital stock, trust principal, or current funds	7,007,241.	6,855,740.	į
Total net assets or fund balances (see the instructions) Total net assets or fund balances (see the instructions) Total net assets or fund balances (see the instructions) Total net assets or fund balances (see the instructions) 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) Enter amount from Part I, line 27a Other increases not included in line 2 (itemize) Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) Decreases not included in line 2 (itemize) Total net assets or fund balances at beginning of year— Part II, column (a), line 30 (must agree with a column to the part I, line 27a and 3 and 3 and 4 and 5 a		28	Paid-in or capital surplus, or land, building, and equipment fund			
R S 30 Total net assets or fund balances (see the instructions) 31 Total liabilities and net assets/fund balances (see the instructions) 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5	O F	29	Retained earnings, accumulated income, endowment, or other funds			
31 Total liabilities and net assets/fund balances (see the instructions) 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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 6,855,740.	ŘŠ	30	Total net assets or fund balances(see the instructions)	7,007,241.	6,855,740.	A PC
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5			Total liabilities and net assets/fund balances (see the instructions)		6,855,740.	
end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5	Part	III	Analysis of Changes in Net Assets or Fund Balance	<u> </u>		
2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5	1	Tota	I net assets or fund balances at beginning of year— Part II, colun of year figure reported on prior year's return)	nn (a), line 30 (must agre	ee with	7,007,241.
3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5	2				2	
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5	_				3	
5 Decreases not included in line 2 (itemize)	_		========		4	6,855,740.
	5				5	
			· · · ———————	- Part II, column (b), line	30 6	6,855,740.

	beginning in)		Horieria Rabic ase assets	(COIGITIII (I	b) divided by colariii (c))
	2008	346,320.	7,244,300.		0.047806
	2007	395,205.	8,029,108.		0.049222
	2006	375,375.	7,540,175.		0.049783
	2005	577,697.	7,279,150.		0.079363
	2004	1,000.	4,506,923.		0.000222
2	Total of line 1, column (d)			2	0.226396
3	Average distribution ratio for the 5-year number of years the foundation has been	base period— divide the total oen in existence if less than 5 years.	n line 2 by 5, or by the ars	3	0.045279
4	Enter the net value of noncharitable-us	e assets for 2009 from Part X, I	ine 5	4	5,983,528.
5	Multiply line 4 by line 3			5	270,928.
6	Enter 1% of net investment income (19	% of Part I, line 27b)		6	2,353.
7	Add lines 5 and 6			7	273,281.
8	Enter qualifying distributions from Part	XII, line 4		8	318,012.
	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	e. See the

Part VI instructions

		<u> 20-0</u> 2	<u> </u>	24		-age 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948-	see th	e instr	uctions)		
18	Exempt operating foundations described in section 4940(d)(2), check here					
	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)					
ŀ	Domestic foundations that meet the section 4940(e) requirements in Part V,		1		2,	<u>353.</u>
	check here ► X and enter 1% of Part I, line 27b			_		
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable					
-	foundations only Others enter -0-)		2			0.
3	Add lines 1 and 2		3		2,	353.
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 -Q-		5		2,	<u>353.</u>
6	Credits/Payments·					
ā	2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 3, 30	00.				
Ŀ	Exempt foreign organizations – tax withheld at source 6b					
c	: Tax paid with application for extension of time to file (Form 8868)					
c	Backup withholding erroneously withheld 6d					
7	Total credits and payments Add lines 6a through 6d		7		3,	<u>300.</u>
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, enteramount owed	▶ _	9			0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter theamount overpaid	▶ 1	10			<u>947.</u>
_11	Enter the amount of line 10 to be Credited to 2010 estimated tax 947. Refunded	▶ 1	11			0.
Par	t VII-A Statements Regarding Activities				,	
1 <i>a</i>	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did	ıt			Yes	
	participate or intervene in any political campaign?			1a		X
k	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes			1 b		x
	(see the instructions for definition)?			1.5		1
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials or distributed by the foundation in connection with the activities	s publi	shed			
c	Did the foundation file Form 1120-POL for this year?			1c		X
C	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 ▶\$		ſ	o.		
e	(1) On the foundation	sed or		' · ·		
	foundation managers >\$ 0.			ļ		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		X
	If 'Yes,' attach a detailed description of the activities					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, and	ticles				ļi
•	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, and of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes			3		X
	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 onForm 990-T for this year?			4b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		X
	If 'Yes,' attach the statement required by General Instruction T					
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:					
	● By language in the governing instrument, or					
	• By state legislation that effectively amends the governing instrument so that no mandatory directions th	at con	flict			L
	with the state law remain in the governing instrument?	u. 5511		6	X	<u> </u>
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV			7	X	ļ <u>.</u>
8 <i>a</i>	Enter the states to which the foundation reports or with which it is registered (see the 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	ļ
_		3\ a · 4	040/5/		-	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3 for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV) 3f 'Yes,' comp	o) or 4 lete Pi	542(J)(art XIV	5) 9		Х
10						
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing the and addresses	ıı ılalı	100	10		Х
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Form 990-PF (2009) A	Alison Foundation	20-022605	4	Р	age 5
	ents Regarding Activities Continued				
11 At any time during within the meanin	g the year, did the foundation, directly or indirectly, own a controlled entity ng of section 512(b)(13)? If 'Yes', attach schedule (see instructions)		11		X
12 Did the foundation August 17, 2008?	n acquire a direct or indirect interest in any applicable insurance contract before		12	ļ	Х
•	n comply with the public inspection requirements for its annual returns and exempti	on application?	13	X	
		ne no. ► 843-7	68-52	246	
	2 Surfsong Rd Kiaweh Island SC ZIP + 4				
) nonexempt charitable trusts filing Form 990-PF in lieu o Form 1041 – Check here	1 1	N/A	•	
	ount of tax-exempt interest received or accrued during the year	▶ 15			N/A
	ents Regarding Activities for Which Form 4720 May Be Required	 		Vaal	No.
	any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
	lid the foundation (either directly or indirectly) e sale or exchange, or leasing of property with a disqualified person?	Yes X No		1	. i
				-	i
(2) Borrow money disqualified pe	ey from, lend money to, or otherwise extend credit to (or accept it from) a erson?	Yes X No		ł	1
(3) Furnish goods	s, services, or facilities to (or accept them from) a disqualified person?	Yes X No			;
(4) Pay compensa	sation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No			,
(5) Transfer any if for the benefit	income or assets to a disqualified person (or make any of either available t or use of a disqualified person)?	Yes X No			•
foundation agi	money or property to a government official? Exception. Check 'No' if the greed to make a grant to or to employ the official for a period after termination at service, if terminating within 90 days.)	Yes X No			
b If any answer is '\ Regulations section	Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in on 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instruc	tions)?	1b	N	/A
Organizations rely	ying on a current notice regarding disaster assistance check here	>			
c Did the foundation that were not corre	n engage in a prior year in any of the acts described in 1a, other than excepted acts rected before the first day of the tax year beginning in 2009?	5,	1c		X
2 Taxes on failure to private operating f	to distribute income (section 4942) (does not apply for years the foundation was a foundation defined in section 4942(j)(3) or 4942(j)(5)).				
 a At the end of tax y and 6e, Part XIII) 	year 2009, did the foundation have any undistributed income (lines 6d for tax year(s) beginning before 2009?	Yes X No			
If 'Yes,' list the ye	ears ► 20 , 20 , 20				1
b Are there any yea	ars listed in 2a for which the foundation is applying the provisions of section 4942 ect valuation of assets) to the year's undistributed income? (If applying section 4942	2(a)(2) 2(a)(2) to			
all years listed, ar	nswer 'No' and attach statement— see the instructions.)		2b	N	<u>/A</u>
	of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years	here.		-	Į.
► 20 , 20	_ , 20 , 20				į
3a Did the foundation enterprise at any t	n hold more than a 2% direct or indirect interest in any business time during the year?	Yes X No			;
or disqualified per by the Commission (3) the lapse of the	re excess business holdings in 2009 as a result of (1) any purchase by the foundation rsons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approvener under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or le 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to	ed			
determine if the fo	oundation had excess business holdings in 2009)		3b	N	<u> A</u>
4a Did the foundation charitable purpose	n invest during the year any amount in a manner that would jeopardize its es?		4a		X
b Did the foundation jeopardize its charthe tax year begin	n make any investment in a prior year (but after December 31, 1969) that could writable purpose that had not been removed from jeopardy before the first day of anning in 2009?		4b		X
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Form 990-PF (2009) Alison Foundation				226054	Page 6
Part VII-B Statements Regarding Activit		n 4720 May Be Req	uired (continued)	
5a During the year did the foundation pay or incu	-			_	
(1) Carry on propaganda, or otherwise attemption	ot to influence legislation	on (section 4945(e))?	Yes [X	No	1
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	n 4955); or to carry		No	i
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes	[] No	1
(4) Provide a grant to an organization other to in section 509(a)(1), (2), or (3), or section	han a charitable, etc, o i 4940(d)(2)? (see instri	rganization described uctions)	Yes X	No	1
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientifion of cruelty to children	c, literary, or or animals?	Yes	No	!
b If any answer is 'Yes' to 5a(1)-(5), did any of t described in Regulations section 53 4945 or in (see instructions)?	he transactions fail to d a current notice regar	qualify under the excepti ding disaster assistance	ons	5b	N/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶[
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	the foundation claim ex sibility for the grant?	emption from the	N/A Yes	No	
If 'Yes,' attach the statement required by Regi	ulations section 53 494	5-5(d)			
6a Did the foundation, during the year, receive are on a personal benefit contract?			∐Yes ⊉	No	
b Did the foundation, during the year, pay prem	iums, directly or indirec	tly, on a personal benef	fit contract?	6b	- X
If 'Yes' to 6b, file Form 8870 7a At any time during the tax year, was the found	dation a nomit to a prob	whited toy chalter transa	ction? Yes 🕽	No	İ
b If yes, did the foundation receive any proceed	• •			7b	N/A
Part VIII Information About Officers, D	rectors. Trustees.	Foundation Manag	ers, Highly Paid	1	
and Contractors	·				
1 List all officers, directors, trustees, foundation	n managers and their				
(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 other allo	
Ronald H Fielding	Trustee	0.	0.		0.
	5.00				
Kiaweh Island, SC					
Donna M Fielding	Trustee	0.	0.		0.
Kiawah Island, SC	5.00				
					
2 Compensation of five highest-paid employee	s (other than those inc	cluded on line-1 see inst	ructions). If none, en	ter '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 other allo	e account, owances
None					
7					
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~					
Total number of other employees paid over \$50,000	)				0
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Part·VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	1 Employees,
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	
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 <u>N/A</u>	· _
2	
3	<u> </u>
	_
4	· <del>-</del>
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 <u>N/A</u>	· <b>-</b>
2	-
All other program-related investments. See instructions.	
3	-
Total. Add lines 1 through 3	<b>▶</b> 0.
BAA	Form <b>990-PF</b> (2009)

see instructions.)	part. Foreign	iouridations,
1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purpos a Average monthly fair market value of securities	es: 1a	4,682,067.
<b>b</b> Average of monthly cash balances	1 b	1,392,581.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1 d	6,074,648.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)	0.	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3_	6,074,648.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	91,120.
5 Net value of noncharitable-use assetsSubtract line 4 from line 3 Enter here and on Part V, line 4	5	5,983,528.
6 Minimum investment return Enter 5% of line 5	6	299,176.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) priva	ate operating fo	oundations
and certain foreign organizations check here ▶ □ and do not complete	e this part.)	
1 Minimum investment return from Part X, line 6	1	299,176.
2a Tax on investment income for 2009 from Part VI, line 5	2,353.	
b Income tax for 2009. (This does not include the tax from Part VI.)		
c Add lines 2a and 2b	2c	2,353.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	296,823.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	296,823.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amountas adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	296,823.
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		010 010
	1a	318,012.
<b>b</b> Program-related investments – total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purpos	ses 2	
<ul> <li>Amounts set aside for specific charitable projects that satisfy the:</li> <li>a Suitability test (prior IRS approval required)</li> </ul>	3a	
<b>b</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, lin	ne 4 <b>4</b>	318,012.
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 (see instructions)	5	2,353.
6 Adjusted qualifying distributions Subtract line 5 from line 4	6	315,659.

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

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Form **990-PF** (2009)

### Part XIII Undistributed Income (see instructions)

	<b>(a)</b> Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
1 Distributable amount for 2009 from Part XI, line 7				296,823.
2 Undistributed income, if any, as of the end of 2009.				230,023.
a Enter amount for 2008 only			1,610.	
<b>b</b> Total for prior years 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004				
<b>b</b> From 2005	1			
<b>c</b> From 2006	1			
<b>d</b> From 2007	1			
<b>e</b> From 2008	1			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part				
XII, line 4. ► \$ 318,012.				
a Applied to 2008, but not more than line 2a			1,610.	
<b>b</b> Applied to undistributed income of prior years		0.		,
(Election required – see instructions)		<u> </u>	1.7	
<ul> <li>Treated as distributions out of corpus (Election required — see instructions)</li> </ul>	0.			
d Applied to 2009 distributable amount			- 15	296,823.
e Remaining amount distributed out of corpus	19,579.			
5 Excess distributions carryover applied to 2009	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))	_	1 3 5 1 4 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5		=
		es áses a a	Tanga usa Mininggan Mininggan	-
6 Enter the net total of each column as	, ,		· · · · · · · · · · · · · · · · · · ·	العربية المراجعة المراجعة العربية
indicated below:	10.570	•		
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	19,579.		1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	a v Gliotz
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.	- 2 1 2 - 2 444	E Maria
c Enter the amount of prior years' undistribut-				Harris and the second s
ed income for which a notice of deficiency	,		C to the	76 - 76 - 76 - 76 - 76 - 76 - 76 - 76 -
has been issued, or on which the section 4942(a) tax has been previously assessed		0.	<b>李·</b>	
•		<u></u>		द्वैत्राण 🕴
d Subtract line 6c from line 6b. Taxable amount – see instructions	, ,	0.		
e Undistributed income for 2008. Subtract line 4a from				। इ. }र्म
line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009. Subtract lines	*	, F = -		
4d and 5 from line 1. This amount must be			4	0
distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed				<del>), (p)</del> + ) - 1
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.	* * * * * * * * * * * * * * * * * * * *	and the same of the same	1 Mary 1
, ,	<u></u>	, , , , , , , , , , , , , , , , , , ,	The state of the s	1,
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			L.
9 Excess distributions carryover to 2010.		<b>7</b>	Carlotte Control	
Subtract lines 7 and 8 from line 6a	19,579.		The state of the s	2
10 Analysis of line 9:		A THE STATE OF THE	全流通過	
a Excess from 2005	,			Control of the Contro
<b>b</b> Excess from 2006	-	, chap	Charles of the Control of the Contro	G Arm
c Excess from 2007				1 W
d Excess from 2008			* * * * *	# - , ,
<b>e</b> Excess from 2009 19,579.				

Form 990-PF (2009) Alison Foundation				20-0226054	Page 10
Part XIV Private Operating Foundation					N/A
1a If the foundation has received a ruling or d is effective for 2009, enter the date of the	ruling			^	
<b>b</b> Check box to indicate whether the foundation		erating foundation		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years	1 11 0005	4
investment return from Part X for each year listed	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
<b>b</b> 85% of line 2a	<del>.</del>				
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					
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 ( assets at any time during the	Complete this	part only if the	organization h	ad \$5,000 or mor	e in
1 Information Regarding Foundation Manage		istructions.y			
a List any managers of the foundation who he close of any tax year (but only if they have		ore than 2% of the	total contributions r	eceived by the found	lation before the
See Statement 4	contributed more	than \$5,000). (See	section 507(a)(2).)		
<b>b</b> List any managers of the foundation who or a partnership or other entity) of which the f None	wn 10% or more c oundation has a 1	of the stock of a cor 0% or greater inter	poration (or an equi est.	ally large portion of t	he ownership of
2 Information Regarding Contribution, Grant	Gift Loan Scho	Jarchin etc Progr	ame:		
Check here \( \infty \) If the foundation only makes	akes contributions	to preselected cha	arıtable organization:		
complete items 2a, b, c, and d.  a The name, address, and telephone number	of the person to	whom applications	should be addressed		
a me hame, dadress, and telephone hamber	or the person to	whom applications	onodia be addresse.	<b>.</b> .	
<b>b</b> The form in which applications should be so	ubmitted and infor	mation and materia	als they should inclu	de:	
c Any submission deadlines:		<u> </u>			
<b>d</b> Any restrictions or limitations on awards, su	uch as by geograp	hical areas, charita	ible fields, kinds of i	nstitutions, or other t	factors.
BAA	TE	EA0310L 07/06/09		F	orm <b>990-PF</b> (2009)

Form 990-PF (2009) Alison Foundation	1		20-022	26054 Page 1
Part XV Supplementary Information 3 Grants and Contributions Paid During the		- Paymont		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	oundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient		
a Paid during the year				
See Statement 5				
		ľ		
		ı		
		ļ		
Total	· <del>- , · · · · · · · · · · · · · · · · · · </del>		► 3a	317,250.
<b>b</b> Approved for future payment				
				]
	1			
Total			► 3b	

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

Enter gross amounts unless otherwise indicated.	Unrelated	business income	Excluded b	y section 512, 513, or 514	
Program service revenue.	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	(e) Related or exempt function income (see the instructions)
a			11_		
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	1,848.	
4 Dividends and interest from securities.			14	234,176.	
5 Net rental income or (loss) from real estate.					
a Debt-financed property					
<b>b</b> Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory				·	-68,755.
9 Net income or (loss) from special events			<u> </u>		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e			<u> </u>		<del></del>
12 Subtotal Add columns (b), (d), and (e).				236,024.	-68,755.
13 Total. Add line 12, columns (b), (d), and (e)				13 _	167,269.
(See worksheet in the instructions for line 13 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). (See the instructions)
N/A	

# Form 990-PF (2009) Alison Foundation 20-0226054 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

									Yes	No
described i	anızatıon dırectly n section 501(c) d political organizat	of the Code (c	engage in a other than s	ny of the followir ection 501(c)(3) o	ng with a organiza	iny other organizat tions) or in section	ion n 527,	1000		
•	3	-	a nonchar	itable exempt org	ianizatio	n of:				į
(1) Cash				readio onompro	,=,,,===			1a (1)		X
(2) Other a	ssets							1a (2)		X
<b>b</b> Other trans										
	f assets to a non	charitable exe	empt organ	ızatıon				1b(1)		X
	ses of assets from							1b(2)		X
	of facilities, equip		•					1b (3)		X
	rsement arrange	•	. 400010					1b (4)		X
	or Ioan quarantee							1b (5)		Х
	•		no or fundr	aising solicitation	s			1b (6)		Х
			•	ssets, or paid em				1c		X
· · · · · · · · · · · · · · · · ·		,	515, 51.15. u	000to, 0. para 0	, p. 1-7 - 0-1-					
<b>d</b> If the answ the goods, any transac	er to any of the a other assets, or s tion or sharing ar	bove is 'Yes,' services given rrangement, s	complete t by the rep how in colu	the following scheorting foundation.umn(d) the value	edule. Co If the foot of the go	olumr <b>(b)</b> should alvoundation received bods, other assets,	vays show the fair n l less than fair mark or services receive	narket value et value in d.	e of	
	Amount involved			le exempt organization			ansfers, transactions, and		ngement	s
N/A				F						
	· · · · · · · · · · · · · · · · · · ·									
	· · · · · · · · · · · · · · · · · · ·									
			· · · · · · · · · · · · · · · · · · ·							
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						· · · · · · · · · · · · · · · · · · ·	<del>-</del>			
<del> </del>										
-								<del></del>		
described in	lation directly or in section 501(c) on applete the following	of the Códe (o	ated with, of ther than s	or related to, one ection 501(c)(3))	or more	tax-exempt organ ction 527?	izations	Yes	X	No
	ame of organization		(h	Type of organization	ation		(c) Description of re	ationship		
I/A	z z z z z gar nzau	<del>-:-</del>		, . , p = o. ga. ne.		<u> </u>				
_ <del></del>		··				<u> </u>	<del> </del>			
	<del></del>					<u> </u>				
Under penalties of p	erjury, I declare that I ha	ve examined this re	turn, including a	accompanying schedules	and statem	ents, and to the best of m	y knowledge and belief, it is	true, correct, ar	nd	
complete Declarat	on of preparer (other the	nan taxpayer or fid	luciary) is base	d on all information of	which prep	arer has any knowledge	y knowledge and belief, it is			
	( ) a a a a	$\alpha$ $\mathcal{I}$	PSIA	2		1/6/10		And a		
<b>P</b> (2)	SAVIAL Y	IL AM	do			1/6/10	- Sugar	Le-		
Signature of	officer or trustee			miste		Date /	Title			
Prepar	er's 🛌	Check if (See	arer's Identifyi Signature in							
Paid signatu		en G. Sch	wartz,	CPA		6/28/2016	self- employed ► P0	0052234	;	
parer's Firm's	<del></del>	TH DESIGN					EIN ► 20-01			
Use yours it	self-	VESTFALL				<del></del>				
Only employ address		ESTER, NY					Phone no ► 585	-442-3	230	
1 1217 COX		,						Form <b>99</b>		2009)

Federal Statements	Page '				
Alison Foundation					
Expenses Investment Adjust	ted Charitable				
Expenses Investment Adjust	ted Charitable				
Expenses Investment Adjus	c) (d) ted Charitable come Purposes				
\$       245.       \$       245.         \$       245.       \$       245.	0. \$ 0.				
	(a)				

Donna M Fielding

009	Federal Sta	Page 2		
	Alison Foun	dation		20-022605
Statement 5 Form 990-PF, Part XV, Line 3a Recipient Paid During the Year				
Name and Address	Donee <u>Relationship</u>	Found- ation <u>Status</u>	Purpose of Grant	Amount
Coastal Riding Program 2323 Metts Ave Wilmington, NC	None			\$ 500
Agassiz Village 238 Bedford St Lexington, MA	None			7,500
Seneca Park Zoo Society 2222 St Paul Rochester, NY	None			250,000
St. John's College PO Box 2800 Annapolis, MD 21401	None			50,000
JCP OF NC (Easter Seals) 230 W. Monroe St, Suite 1800 Chicago, IL 60606	None			8,90
GIBBES MUSEUM OF ART	None			250
KIAWAH CONSERVANCY 30 KESTREL COURT KAIWAH ISLAND, SC 29455	None			100
			Tota	1 \$ 317,250

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