



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

2009

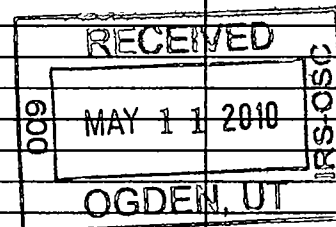
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2009, or tax year beginning , 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 THE CIRCLE FAMILY FOUNDATION		A Employer identification number 20-0500539
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 1006 SEGOVIA CIRCLE		B Telephone number (714) 630-0299
	City or town, state, and ZIP code PLACENTIA, CA 92870		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,149,737. (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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	197,051.		N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	63,874.	63,874.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<39,287.>			
	b Gross sales price for all assets on line 6a	263,653.			
	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	9,953.	9,953.		STATEMENT 2	
12 Total. Add lines 1 through 11	231,591.	73,827.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	3,400.	0.		3,400.
	c Other professional fees STMT 4	5,246.	1,412.		3,834.
	17 Interest				
	18 Taxes STMT 5	353.	353.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	1,082.	0.		1,082.
	24 Total operating and administrative expenses. Add lines 13 through 23	10,081.	1,765.		8,316.
	25 Contributions, gifts, grants paid	150,740.			150,740.
26 Total expenses and disbursements. Add lines 24 and 25	160,821.	1,765.		159,056.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	70,770.				
b Net investment income (if negative, enter -0-)		72,062.			
c Adjusted net income (if negative, enter -0-)			N/A		



7P

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	7,341.	23,314.	23,314.
	2 Savings and temporary cash investments	678,551.	520,466.	512,733.
	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 8	1,495,219.	1,387,788.	1,613,690.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	2,181,111.	1,931,568.	2,149,737.
	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 and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,181,111.	1,931,568.	
	30 Total net assets or fund balances	2,181,111.	1,931,568.	
	31 Total liabilities and net assets/fund balances	2,181,111.	1,931,568.	

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	2,181,111.
2 Enter amount from Part I, line 27a	2	70,770.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,251,881.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7	5	320,313.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,931,568.

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 SEE ATTACHMENT	P	VARIOUS	VARIOUS
b CAPITAL GAINS DIVIDENDS			
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 262,222.		302,940.	<40,718.>
b 1,431.			1,431.
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			<40,718.>
b			1,431.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px; margin-right: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">2</div> </div>	<39,287.>
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	<div style="border-left: 1px solid black; padding-left: 5px; margin-right: 5px;"></div> <div style="border: 1px solid black; padding: 2px 5px; text-align: center;">3</div>	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	237,527.	2,140,491.	.110968
2007	207,833.	2,148,684.	.096726
2006	158,515.	1,960,040.	.080873
2005	304,035.	2,147,148.	.141599
2004	1,012,693.	2,374,772.	.426438

2 Total of line 1, column (d)	2	.856604
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	.171321
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,907,481.
5 Multiply line 4 by line 3	5	326,792.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	721.
7 Add lines 5 and 6	7	327,513.
8 Enter qualifying distributions from Part XII, line 4 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.	8	159,056.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	1,441.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> 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, col (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	1,441.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	1,441.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	5,635.	
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	5,635.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> 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	4,194.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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		X
1c Did the foundation file Form 1120-POL for this year?		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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • 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?	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 XIV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) CA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 9	X	

Form 990-PF (2009)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► **NONE**

14 The books are in care of ► **DOUGLAS CIRCLE** Telephone no. ► **(714) 630-0299**
 Located at ► **1006 SEGOVIA CIRCLE, PLACENTIA, CA** ZIP+4 ► **92870**

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.

	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b 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)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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

Form 990-PF (2009)

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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

If "Yes" to 6b, file Form 8870.

X

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		0.	0.	600.

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
NONE				

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

0

Form 990-PF (2009)

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.

Form 990-PF (2009)

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	1,418,956.
b	Average of monthly cash balances	1b	517,573.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,936,529.
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	1,936,529.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	29,048.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,907,481.
6	Minimum investment return. Enter 5% of line 5	6	95,374.

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	95,374.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,441.
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,441.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	93,933.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	93,933.
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	93,933.

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	159,056.
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	159,056.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	159,056.

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.

Form 990-PF (2009)

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				93,933.
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	896,068.			
b From 2005	197,894.			
c From 2006	62,219.			
d From 2007	107,697.			
e From 2008	132,187.			
f Total of lines 3a through e	1,396,065.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	159,056.			
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)	0.			
d Applied to 2009 distributable amount				93,933.
e Remaining amount distributed out of corpus	65,123.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,461,188.			
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)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	896,068.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	565,120.			
10 Analysis of line 9:				
a Excess from 2005	197,894.			
b Excess from 2006	62,219.			
c Excess from 2007	107,697.			
d Excess from 2008	132,187.			
e Excess from 2009	65,123.			

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

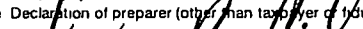

- | | | | |
|--|--------------|------------|-----------|
| <p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?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

[illegible]

- 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		

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.

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		5/4/2010 Date	Founder Title	
Paid Preparer's Use Only	Preparer's signature  Max D. Hays		Date 5-4-10	Check if self-employed <input type="checkbox"/>	Preparer's identifying number 06-105772
	Firm's name (or yours if self-employed), address, and ZIP code DELOITTE TAX LLP 695 TOWN CENTER DR., SUITE 1200 COSTA MESA, CA 92626-9978		EIN Phone no. (714) 436-7100		

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
-------------	--	-----------	---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB #1040-7852	3,389.	0.	3,389.
CHARLES SCHWAB #2076-4181	58,921.	1,431.	57,490.
CHARLES SCHWAB #3174-9933	186.	0.	186.
CHARLES SCHWAB #5270-1498	2,781.	0.	2,781.
CNB CHECKING	28.	0.	28.
TOTAL TO FM 990-PF, PART I, LN 4	65,305.	1,431.	63,874.

FORM 990-PF	OTHER INCOME	STATEMENT	2
-------------	--------------	-----------	---

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
UNREALIZED GAIN	9,953.	9,953.	
TOTAL TO FORM 990-PF, PART I, LINE 11	9,953.	9,953.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
-------------	-----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,400.	0.		3,400.
TO FORM 990-PF, PG 1, LN 16B	3,400.	0.		3,400.

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
INVESTMENT MANAGEMENT FEES	1,412.	1,412.		0.
PROFESSIONAL FEES OTHER	3,834.	0.		3,834.
TO FORM 990-PF, PG 1, LN 16C	5,246.	1,412.		3,834.

FORM 990-PF	TAXES	STATEMENT	5
-------------	-------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	353.	353.		0.
TO FORM 990-PF, PG 1, LN 18	353.	353.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
-------------	----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSES	426.	0.		426.
BANK FEES	56.	0.		56.
ADMINISTRATIVE EXPENSES	600.	0.		600.
TO FORM 990-PF, PG 1, LN 23	1,082.	0.		1,082.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
-------------	--	-----------	---

DESCRIPTION	AMOUNT
PRIOR YEAR FAIR MARKET VALUE TO BOOK DIFFERENCE	320,313.
TOTAL TO FORM 990-PF, PART III, LINE 5	320,313.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CHARLES SCHWAB 4181 - SEE ATTACHED STMT	1,204,384.	1,402,418.
TRANSAMERICA	183,404.	211,272.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,387,788.	1,613,690.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	9
-------------	---	-----------	---

NAME OF CONTRIBUTOR	ADDRESS
DOUGLAS CIRCLE	1006 SEGOVIA CIRCLE PLACENTIA, CA 92870

CIRCLE FAMILY FOUNDATION**EIN: 20-0500539****YEAR: 12/31/2009****FORM 990-PF****PART II, LINE 10b****INVESTMENT PORTFOLIO**

CHARLES SCHWAB #4181	BOOK	FMV
Artisan Intl Fund	30,000	26,474
Century Small Cap Select	30,000	22,997
Dodge & Cox Income Fund	220,000	250,573
Dodge & Cox International Stock	21,444	36,534
Harbor International	55,000	48,352
Harbor Small Cap Value	46,880	52,193
JP Morgan Mid Cap Value CL A	20,000	17,063
JP Morgan Mid Cap Value Inst CL	20,000	15,919
Managers Special Equity	30,000	20,698
Morgan Stanley Institutional	20,000	14,461
PIMCO Total Return Fund	431,348	647,873
Royce Opportunity Fund	20,000	16,152
Royce Total Return Fund	20,000	16,829
TCW Total Return Bond	70,000	71,703
Tweedy Browne Global Value	40,000	34,190
William Blair International	30,000	19,421
William Blair Mid Cap	40,000	36,297
IShares S&P GSSI Ind Fund	19,874	15,440
IShares TR MSCI EAFE FD	39,838	39,249
	1,204,384	1,402,418

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
DOUGLAS CIRCLE 1006 SEGOVIA CIRCLE PLACENTIA, CA 92870	PRESIDENT AND DIRECTOR 1.00	0.	0.	0.
JAN CIRCLE 1006 SEGOVIA CIRCLE PLACENTIA, CA 92870	SECRETARY AND DIRECTOR 1.00	0.	0.	0.
KYLE CIRCLE 1006 SEGOVIA CIRCLE PLACENTIA, CA 92870	DIRECTOR 1.00	0.	0.	150.
BRENDAN CIRCLE 1006 SEGOVIA CIRCLE PLACENTIA, CA 92870	DIRECTOR 1.00	0.	0.	150.
LEAH CIRCLE 1006 SEGOVIA CIRCLE PLACENTIA, CA 92870	DIRECTOR 1.00	0.	0.	150.
TOM CURTIS 1006 SEGOVIA CIRCLE PLACENTIA, CA 92870	DIRECTOR 1.00	0.	0.	150.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	600.

CIRCLE FAMILY FOUNDATION

EIN. 20-0500539

YEAR 12/31/2009

FORM 990-PF

PART IV - Capital Gains and Losses for Tax on Investment Income

Quantity	Security	How acquired	Date Acquired	Date Sold	Proceeds	Depreciation allowed	Cost Basis	Gain or (loss)
4	CME Group Inc		9/11/2008	1/7/2009	793		1,351	(558)
32	American Express		9/11/2008	1/26/2009	501		1,213	(712)
4	CME Group Inc		9/11/2008	2/3/2009	686		1,351	(665)
12	Allergan Inc		9/11/2008	2/19/2009	482		714	(232)
33	American Express		9/11/2008	2/19/2009	429		1,251	(822)
43	American Express		10/30/2008	2/19/2009	559		1,128	(569)
24	American Express		12/18/2008	2/19/2009	312		489	(177)
5	CME Group Inc		9/11/2008	2/19/2009	899		1,689	(790)
6	Jacobs Engineering Group Inc		9/11/2008	2/19/2009	205		362	(157)
26	Praxair Inc		9/11/2008	2/19/2009	1,639		2,183	(544)
91	Tyco Electronics		9/11/2008	2/19/2009	1,058		2,693	(1,636)
37	Allergan Inc		9/11/2008	2/23/2009	1,475		2,202	(727)
47	Tyco Electronics		9/11/2008	2/23/2009	480		1,391	(912)
53	Daimler Chrysler		9/11/2008	2/24/2009	1,275		3,000	(1,725)
11	Boeing Co		9/11/2008	3/2/2009	315		680	(366)
28	Caterpillar Inc		9/11/2008	3/2/2009	614		1,784	(1,170)
52	Expeditors Intl Wash		9/11/2008	3/2/2009	1,324		1,833	(509)
100	Johnson Controls Inc		9/11/2008	3/2/2009	1,062		3,089	(2,027)
36	Jacobs Engineering Group Inc		9/11/2008	3/2/2009	1,111		2,172	(1,062)
31	Paccar Inc		9/11/2008	3/2/2009	704		1,292	(588)
9	Praxair Inc		9/11/2008	3/2/2009	478		756	(278)
51	Tyco Electronics		9/11/2008	3/2/2009	448		1,510	(1,061)
13	T Rowe Price Group Inc		9/11/2008	3/2/2009	276		745	(470)
58	Varian Med Sys Inc Com		9/11/2008	3/2/2009	1,703		3,692	(1,989)
9	Jacobs Engineering Group Inc		9/11/2008	3/9/2009	293		543	(250)
26	RAYTHEON CO DELAWARE NEW		9/11/2008	3/9/2009	888		1,552	(664)
23	UNION PACIFIC CORP		9/11/2008	3/9/2009	786		1,773	(987)
49	Boeing Co		9/11/2008	4/1/2009	1,715		3,030	(1,315)
38	Allergan Inc		9/11/2008	5/1/2009	1,692		2,261	(569)
98	General Electric		9/11/2008	6/19/2009	1,170		2,682	(1,512)
81	AT&T INC		9/11/2008	6/19/2009	1,930		2,521	(590)
77	AT&T INC		9/11/2008	6/24/2009	1,884		2,396	(512)
67	General Electric		9/11/2008	7/7/2009	748		1,834	(1,086)
21	RAYTHEON CO DELAWARE NEW		9/11/2008	7/7/2009	883		1,254	(370)
47	Hewlett-Packard		2/6/2009	7/13/2009	1,738		1,701	37
85	General Electric		9/11/2008	7/20/2009	988		2,326	(1,339)
74	General Electric		10/30/2008	7/20/2009	860		1,426	(567)
82	General Electric		3/19/2009	7/20/2009	953		868	85
31	RAYTHEON CO DELAWARE NEW		9/11/2008	7/23/2009	1,393		1,851	(458)
11	Apple Computer		9/11/2008	8/17/2009	1,764		1,644	120
32	Becton Dickinson & Co		9/11/2008	8/17/2009	2,135		2,647	(513)
22	Becton Dickinson & Co		10/30/2008	8/17/2009	1,468		1,474	(6)
58	Expeditors Intl Wash		9/11/2008	8/17/2009	1,809		2,044	(235)
6	Gilead Sciences Inc		9/11/2008	8/17/2009	256		287	(31)
23	RAYTHEON CO DELAWARE NEW		9/11/2008	8/17/2009	1,076		1,373	(297)
46	Gilead Sciences Inc		9/11/2008	9/17/2009	2,096		2,203	(107)
48	RAYTHEON CO DELAWARE NEW		9/11/2008	9/17/2009	2,233		2,865	(633)
16	RAYTHEON CO DELAWARE NEW		10/30/2008	9/17/2009	744		783	(39)
28	Becton Dickinson & Co		10/30/2008	10/6/2009	1,883		1,876	7
17	Becton Dickinson & Co		5/1/2009	10/6/2009	1,143		1,048	96
83	Qualcomm, Inc		9/11/2008	10/6/2009	3,530		4,053	(523)
9	Qualcomm, Inc		9/11/2008	10/6/2009	383		439	(57)
30	UNION PACIFIC CORP		9/11/2008	10/6/2009	1,756		2,313	(556)
55	Tyco Electronics		9/11/2008	10/7/2009	1,187		1,628	(441)
104	Tyco Electronics		10/30/2008	10/7/2009	2,245		1,914	331
69	Varian Med Sys Inc Com		9/11/2008	10/7/2009	2,717		4,392	(1,676)
29	Varian Med Sys Inc Com		2/23/2009	10/7/2009	1,142		984	157
42	Gilead Sciences Inc		9/11/2008	10/8/2009	1,892		2,011	(120)
18	Praxair Inc		9/11/2008	10/8/2009	1,456		1,511	(55)
21	Qualcomm, Inc		9/11/2008	10/8/2009	878		1,025	(147)
3674	FHLMC		9/29/2009	10/15/2009	3,076		3,367	(291)
599	FNMA		9/29/2009	10/25/2009	599		643	(44)
2800	iShares MSCI EAFE Index Fund		10/16/2009	10/28/2009	150,039		157,108	(7,069)
7000	Federal National Mortgage Assoc		10/19/2009	11/12/2009	7,778		7,795	(17)
2340	FHLMC		9/29/2009	11/15/2009	2,340		2,545	(205)
50	Praxair Inc		9/11/2008	11/20/2009	4,104		4,198	(94)
40	Sigma Aldrich Corp		9/11/2008	11/20/2009	2,139		2,071	67
565	FNMA		9/29/2009	11/25/2009	565		607	(42)
5000	Conoco Funding 11 Notes		9/30/2009	11/30/2009	5,469		5,513	(44)
37	Amazon		9/11/2008	12/11/2009	4,952		2,910	2,043
2643	FHLMC		9/29/2009	12/15/2009	2,643		2,883	(240)
106	Intel Corp		10/8/2009	12/16/2009	2,049		2,115	(67)
7	Apple Computer		9/11/2008	12/23/2009	1,402		1,046	356
6	Gilead Sciences Inc		9/11/2008	12/23/2009	257		287	(30)
61	Gilead Sciences Inc		9/11/2008	12/23/2009	2,615		2,921	(306)
25	Gilead Sciences Inc		9/11/2008	12/23/2009	1,072		1,197	(125)
586	FNMA		9/29/2009	12/25/2009	586		629	(43)
Total Capital Gain (Loss):					262,222		302,939	(40,718)

Name	Payee Tax ID	Street Address	City	State	Zip	Relationship	Project Description	Purpose	Amount
Donations:									
Athletes in Action		33 Murray-Dodge Hall	Princeton	NJ	08544-5264	None	General Donation	General	\$ 500
California Baptist University		8432 Magnolia Ave	Riverside	CA	92504	None	General Donation	General	\$ 500
Campus Crusade for Christ		PO Box 628222	Orlando	FL	32862-8222	None	A/C #4464-32092 / 0379301 Doug & Ev Harris	General	\$ 1,440
Campus Crusade for Christ		PO Box 628222	Orlando	FL	32862-8222	None	A/C #4464-32092 / 0038481 Ostendorf	General	\$ 300
Mariners Church		5001 Newport Coast Dr	Irvine	CA	92603	None	General Fund / Uganda	General	\$ 26,750
The Masters Program		4500 Campus Drive, Suite 550	Newport Beach	CA	92660	None	General	General	\$ 7,500
Yorba Linda Friends Church		18637 Yorba Linda Blvd	Yorba Linda	CA	92886	None	General Fund	General	\$ 26,250
<1>									\$ 63,240
Discretionary Grants:									
Athletes in Action		33 Murray-Dodge Hall	Princeton	NJ	08544-5264	None	Athletes in Action- Princeton Campus	General	\$ 2,500
Birth Choice Pregnancy Centers Inc		415 N Sycamore Street, Suite 200	Santa Ana	CA	92701	None	Discretionary Grants	General	\$ 7,500
Free Wheelchair Mission		9341 Irvine Blvd	Irvine	CA	92618	None	Discretionary Grants	General	\$ 2,500
Lutheran High School		2222 North Santiago Blvd	Orange	CA	92867	None	Discretionary Grants Ohio Football Trip	General	\$ 2,500
New Hope International		P O Box 25490	Colorado Springs	CO	80936	None	Discretionary Grant to Oleg Reutsk / Moldova	General	\$ 2,500
New Hope International		P O Box 25490	Colorado Springs	CO	80936	None	Discretionary Grant to Rei Abrudan-Romania	General	\$ 2,500
PR Ministries		509 Greenmeadow Drive	Franklin	TN	37069	None	Program Support	General	\$ 5,000
<1>									\$ 25,000
Core Grants:									
Birmingham Theological Seminary	63-0846743	2200 Brnarwood Way	Birmingham	AL	35243-2923	None	Westminster Seminary in Uganda/New Campus Cons	General	\$ 10,000
Free Wheelchair Mission	31-1781635	9341 Irvine Blvd	Irvine	CA	92618	None	Program Support	General	\$ 15,000
Hillview Acres	94-1497687	3683 Chino Avenue	Chino	CA	91710	None	The Chaplain at Hillview Acres Children's Home	General	\$ 11,000
Kidworks	74-3081569	1902 W Chestnut	Santa Ana	CA	92703	None	Summer Programs	General	\$ 12,500
Rolling Stone Ministries	26-0233103	9092 Rama Street	Villa Park	CA	92861	None	Program Support	General	\$ 14,000
<1>									\$ 62,500
Sum <1>									\$ 150,740
Total Contributions									