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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 found:
For calendar year 2009, or tax year beginning

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements ar beginning 2009, and ending

FOI Car	enuar y	rear 2009, or t	ax year beginning	iig	, 2003	, and ending		<u></u>		
G Che	eck all t	hat apply	Initial return	Init	ial Return of a former p	ublic charity		Fina	al return	
			Amended ret	urn	Address	change Nam	ne c	hange		
Use t	he						A	Employer identification nur	nber	
IRS lab	oel. Eo			ds Fa	amily Foundatio	n	20-0968659			
Otherw		.O. Box 4		_		ľ	В	Telephone number (see the	instructions)	
	ortype. Santa Maria, CA 93456							805-937-2197	•	
See Spe	See Specific					c	If exemption application is	pending, check here		
Instruct	ions.						D	1 Foreign organizations, chec	· -	
H C	heck ty	pe of organiza	ation. X Sec	tion 50	1(c)(3) exempt private f	oundation		2 Foreign organizations meet	ing the 85% test, check	
Γ			nonexempt cha	ritable t	trust Other taxable i	private foundation		here and attach computation	n 🏲 📙	
	ır market	value of all asse	ets at end of year		counting method X C	ash Accrual	E	If private foundation status		
(f	rom Part i	II, column (c), line	e 16)		Other (specify)	₩	F	under section 507(b)(1)(A) If the foundation is in a 60		
▶\$		8,057	,719.	(Part I	, column (d) must be or		г	under section 507(b)(1)(B)	. check here.	
Part I	Ana		evenue and	· · · · ·	1	<u> </u>				
	Exp	enses (The	total of amount	s ın	(a) Revenue and expenses per books	(b) Net investmer income	ıτ	(c) Adjusted net income	(d) Disbursements for charitable	
	colu	mns (b), (c), a	and (d) may not	neces-	1			inteorne	purposes	
		y equal the al the instruction	mounts in colum	n (a)					(cash basis only)	
	<u> </u>		grants, etc, received	(att sch)	1,000,000.					
	•		oundn is not reg to at							
	3 Ir	nterest on sav	rings and tempo				_			
		ash investmei			11,018.	11,01			······································	
			rest from securities		127,188.	127,18	<u>8.</u>			
	_	ross rents et rental income								
_	_ 01	r (loss)			11 120					
K		et gain/(loss) from ross sales price fo	sale of assets not on		11,132.					
R E V	as	ssets on line 6a		000.		11 10				
E N			ome (from Part IV, III	ie 2)		11,13	<u>2.</u>			
Ü		let short-term ncome modific							· · · · · · · · · · · · · · · · · · ·	
Ĕ		ross saleş less	l							
	ı re	turns and Howances								
	b Le	ess Cost of oods sold								
		ross profit/(loss)	(att sch)							
			(attach schedule)						
	'' "		(2110011001100110	_					· · · · · · · · · · · · · · · · · · ·	
	12 1	otal. Add hipe	5.1,through 11		1,149,338.	149,33	8.	0.		
	13 c	ompensation of eff	es diedos truste	es, etc	0.					
	14 0	ther employee sal	tarres and wages (1						
A	16a 🖺	egal fees (attach	employee bene schedule)							
D M	t A	cchunting fees (at	ttach sch) Selen	\$t 1	4,450.	2,22	5.		2,225.	
I N			adusch) See		31,276.	31,27				
0 1	17 ^L tr	nterest	_ · u, U		L					
PS ET RR			see instr) See St	mt 3	1,760.				160.	
E T R R A A T T		epreciation (a								
- 1 i i		ch) and deple	tion							
N V G E		ccupancy	ences, and meet	nac				<u> </u>		
AE		raver, confere rinting and pu		ıı ıya		 		 		
N X			s (attach schedi	ıle)						
E E	•		See Stateme		135.				135.	
5	24 T		g and administr							
<u>.</u> 5	e:	xpenses. Add	f lines 13 throug	h 23	37,621.	33,50	1.		2,520.	
י ב			, grants paid Par		331,500.				331,500.	
<u> </u>			s and disbursen	nents.	200 200					
7		dd lines 24 ai			369,121.	33,50	⊥.	0.	334,020.	
			6 from line 12:	coc	•					
ā	aE	xcess of reve nd disbursen	enue over expen nents	5 6 5	780,217.	}				
CANINED			ome (if negative, ente	t -0-7	100,227.	115,83	7			
a i			ne (if negative, enter			120,00	•	0.		

Form 990-PF

Form 990-PF (2009) Edwin and Jeanne Woods Family Foundation 20-0					68659 Page 2
Dart	Part II Balance Sheets Attached schedules and amounts in the description column should be for end of year amounts only			End	of year
rart	<u>"</u> '	(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	2,624,402.	3,893,486.	3,893,486.
	2	Savings and temporary cash investments.			
	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 (attach schedule) (see the instructions).			
	7	Other notes and loans receivable (attach sch)	_		
S		Less allowance for doubtful accounts ▶			
A S E T	8	Inventories for sale or use			
E T	9	Prepaid expenses and deferred charges			
Ś	10 a	Investments – US and state government	744 061	256 004	275 070
		obligations (attach schedule)	744,961.	256,094.	275,078.
	ì	Investments — corporate stock (attach schedule)	2 077 220	2 077 220	2 000 155
		: Investments — corporate bonds (attach schedule)	3,877,220.	3,877,220.	3,889,155.
	11	Investments – land, buildings, and equipment basis	-{		-
		Less: accumulated depreciation (attach schedule)		 	
	12	Investments — mortgage loans .			
	13	Investments — other (attach schedule)			
	14	Land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule)			
	15	`	<u> </u>		
	16	Total assets (to be completed by all filers — see instructions. Also, see page 1, item I).	7,246,583.	8,026,800	8,057,719.
	17		7,240,303.	0,020,000	0,007,715.
Ī	18		77		7
A B	19				1
Ţ	20	Loans from officers, directors, trustees, & other disqualified persons		· · · · · · · · · · · · · · · · · · ·	7
L	21	Mortgages and other notes payable (attach schedule)			1
Ť	22	Other liabilities (describe			┥
Ë	~	Other habilities (describe			-
<u>S</u>	23	Total liabilities (add lines 17 through 22)	0.	0	-1
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
NF	24	Unrestricted			_
E U	25	Temporarily restricted			j
, D	26	Permanently restricted			
A B S A E L A		Foundations that do not follow SFAS 117, check here X and complete lines 27 through 31.			
ĔĹ	27	Capital stock, trust principal, or current funds	7,246,583.	8,026,800	
TA	28	Paid-in or capital surplus, or land, building, and equipment fund	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	0/020/00	<u> </u>
С	29	Retained earnings, accumulated income, endowment, or other funds			
O E R S	30	Total net assets or fund balances (see the instructions) .	7,246,583.	8,026,800	7
	31	Total liabilities and net assets/fund balances		1	7
<u> </u>	1	(see the instructions)	7,246,583.	8,026,800	·I
Par		Analysis of Changes in Net Assets or Fund Balanc			
1	Tota	I net assets or fund balances at beginning of year – Part II, colu- of-year figure reported on prior year's return)	ımn (a), line 30 (must a	agree with	7,246,583.
2		er amount from Part I, line 27a		<u>'</u>	
3		Increases not included in line 2 (itemize)		 2	
4		lines 1, 2, and 3			
5	_	pases not included in line 2 (itemize)		5	
-	Tota	I not accepts or fund belonger at and of year (line 4 minus line 5)	Port II. solumn (b)		8 026 800

(a) List and descri 2-story brick wareho	be the kind(s) of property sold (e g , reuse; or common stock, 200 shares MLC	al estate, C Company)	(b) How acqu P — Purcha D — Donat	ase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 250000 US TReasury	3.25% due 1/15/09		P		7/23/04	1/15/09
b 250000 FNMA 5.3%			P			
С						
e						
(e) Gross sales price	(or allowable) plus expense of sale				(h) Gain or (e) plus (f) m	inus (g)
<u>a</u> 250,000			,680.			3,320.
b 250,000		242	,188.			7,812.
d d	 					
	 					
	owing gain in column (h) and owned by	the foundation on 12/31/69	 }-		(1) 0,, (0, 1)	(1)
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (over column (j), if any			(I) Gains (Column (k ain minus column (k n -0-) or Losses (fr	(), but not less
a						3,320.
b						7,812.
С						
d						
е						
2 Capital gain net income or (r		enter in Part I, line 7 er -0- in Part I, line 7	į	2		11,132.
3 Net short-term capital gain o	r (loss) as defined in sections 1222(5)	and (6)				
	ine 8, column (c) (see the instructions)	If (loss), enter -0-			İ	0
in Part I, line 8 Part V Qualification Und	er Section 4940(e) for Reduced	J. Toward Net Investment	-4	_3_		0
section 4940(d)(2) applies, leave	e this part blank	1940(a) tax on net investmer		.)		<u> </u>
section 4940(d)(2) applies, leaved as the foundation liable for the s 'Yes,' the foundation does not que	e this part blank ection 4942 tax on the distributable amu ualify under section 4940(e) Do not cor	nount of any year in the base mplete this part	e period?		Yes	X No
section 4940(d)(2) applies, leaved as the foundation liable for the s 'Yes,' the foundation does not que	e this part blank ection 4942 tax on the distributable am	nount of any year in the base mplete this part	e period?	es	Yes Distribution umn (b) divided	n ratio
section 4940(d)(2) applies, leave as the foundation liable for the s 'Yes,' the foundation does not quality. 1 Enter the appropriate amountained (a) Base period years Calendar year (or tax year	e this part blank ection 4942 tax on the distributable amualify under section 4940(e). Do not continuous tin each column for each year, see the	nount of any year in the base mplete this part e instructions before making (c) Net value of noncharitable-use assi	e period?	es	(d) Distribution	n ratio by column (c))
section 4940(d)(2) applies, leave as the foundation liable for the s 'Yes,' the foundation does not qualified the appropriate amour (a) Base period years Calendar year (or tax year beginning in)	e this part blank section 4942 tax on the distributable amualify under section 4940(e). Do not continuous time each column for each year, see the (b) Adjusted qualifying distributions 451,772. 317,094.	nount of any year in the base mplete this part e instructions before making (c) Net value of noncharitable-use asso	e period? any entreets	es	(d) Distribution	n ratio by column (c)) 0.067833 0.045892
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section 4940(d)(2) applies, leaved as the foundation liable for the series in the foundation does not get a series in the series	ethis part blank section 4942 tax on the distributable amualify under section 4940(e). Do not continuous time each column for each year, see the (b) Adjusted qualifying distributions 451,772. 317,094. 254,975. 254,434. 160,562. The 5-year base period — divide the totion has been in existence if less than 5 partiable-use assets for 2009 from Part income (1% of Part I, line 27b)	nount of any year in the base implete this part e instructions before making (c) Net value of noncharitable-use assored 6, 659 6, 909 5, 940 4, 908 4, 947 Intal on line 2 by 5, or by the syears	ets 9,914. 9,548. 9,411. 8,759.	2 3 4 5	(d) Distribution umn (b) divided	0.06783 0.04589 0.04292 0.05183 0.03245 0.24093 0.04818 7,008,257 337,714 1,158

Form	990-PF (2009) Edwin and Jeanne Woods Family Foundation 20-0968659		Р	age 4
Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the instruc	tions)		
1 a	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.)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V,		2,3	<u>317.</u>
	check here ► and enter 1% of Part I, line 27b			
С	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-)			0.
3	Add lines 1 and 2		2,3	317.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-		 _	0.
2				317.
0_	Credits/Payments 2009 estimated tax pmts and 2008 overpayment credited to 2009 . 6a 1,844.			
	2009 estimated tax pmts and 2008 overpayment credited to 2009 Exempt foreign organizations — tax withheld at source 6a 1,844.			
	Tax paid with application for extension of time to file (Form 8868).			
	Backup withholding erroneously withheld 6d			
	Total credits and payments. Add lines 6a through 6d		1 8	344.
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached.			,11.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			473.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		<u> </u>	
11	Enter the amount of line 10 to be. Credited to 2010 estimated tax			
	VII-A Statements Regarding Activities			
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
1 a	participate or intervene in any political campaign?	1 a		Х
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		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			_
С	Did the foundation file Form 1120-POL for this year?	1 c		_ 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. Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on	-		
•	foundation managers. \Rightarrow \$ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		Х
_	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, articles		lo -	١.,
•	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?	4 a		X
b	If 'Yes,' has it filed a tax return on Form 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 that conflict			
	with the state law remain in the governing instrument?	6		X
	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	<u>X</u>	
8a	Enter the states to which the foundation reports or with which it is registered (see the 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	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
	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names			
BAA	and addresses	10 orm 99	0-PF	X (2009)

	m 990-PF (2009) Edwin and Jeanne Woods Family Foundation	20-0968659		Pa	age 5
Pai	rt 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		Х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address N/A	application?	13	Х	
14	The books are in care of ► Jeanne Woods Telephone in the books are in care of ► Jeanne Woods	no ► 805-93	7-21	97	
	Located at ► P.O. Box 491, Santa Maria, CA ZIP + 4 ►	93456			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	1 1	N/A	>	Ц
	and enter the amount of tax-exempt interest received or accrued during the year	▶ 15			N/A
Pa	rt 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
1	a 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 X No			,
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No		ł	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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 X 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 X 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 the instruction	ns)?	1 b	N	A
	Organizations relying on a current notice regarding disaster assistance check here	▶ _		-	
	${f c}$ 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 X No			
	If 'Yes,' list the years ► 20, 20, 20]]		
	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942((relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(applying section 4942))		2 b	N	A
	all years listed, answer 'No' and attach statement — see the instructions) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years h 20, 20, 20, 20	ere	20	14,	<u> </u>
3	3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X 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)		3 b	N	/A
4	4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		х
	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

TEEA0305L 07/06/09

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Form **990-PF** (2009)

Form 990-PF (2009) Edwin and Jeanne W			20-096	8659	Page 6
Part VII-B Statements Regarding Activiti	es for Which Form	4720 May Be Requ	uired (continued)		
5a During the year did the foundation pay or incur	any amount to				
(1) Carry on propaganda, or otherwise attemp	t to influence legislatio	n (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific publi on, directly or indirectly, any voter registra	ic election (see section tion drive?	1 4955), or to carry		No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	. Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	an a charitable, etc, or 4940(d)(2)? (see instru	ganization described uctions)	. Yes X	No	
(5) Provide for any purpose other than religious educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X	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 a current notice regard	qualify under the except ding disaster assistance	ions	5 b	N/A
Organizations relying on a current notice regain	ding disaster assistant	ce check here	► 🗌		
c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure response	sibility for the grant?	•	N/A Yes	No	·
If 'Yes,' attach the statement required by Regu	ılatıons section 53 494!	5-5(d)			
6a Did the foundation, during the year, receive ar on a personal benefit contract?		, , , ,	∐Yes X	No .	
b Did the foundation, during the year, pay premi If 'Yes' to 6b, file Form 8870	ums, directly or indirec	tly, on a personal benef	fit contract?	6b	X
7a At any time during the tax year, was the found	lation a party to a proh	ibited tax shelter transa	ction? Yes X	No	
b If yes, did the foundation receive any proceeds				7b	N/A
Part VIII Information About Officers, Di				11	
and Contractors					<u> </u>
1 List all officers, directors, trustees, foundatio		compensation (see inst	ructions).		
(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) Expens other all	e account, owances
Edwin Newhall Woods	President	0.	0.		0.
P.O. Box 491	0				
Santa Maria, CA 93456					
Francine Newhall Woods	VP	0.	0.	[0 .
P.O. Box 491	0				
Santa Maria, CA 93456		<u> </u>			
Prudence Jeanne Woods Noon P.O. Box 491	Secretary 0	0.	0.		0 .
Santa María, CA 93456	<u> </u>				
Jeanne Portnoff Woods	CFO	0.	0.		0 .
P.O. Box 491	0				
Santa Maria, CA 93456					
2 Compensation of five highest-paid employee					
(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	other all	se account, owances
None					
				-	
Total number of other employees paid over \$50,000	l	1	<u> </u>		
BAA	TEEA0306L	07/06/09		1	0-PF (2009)

Form 990-PF (2009) Edwin and Jeanne Woods Family Foundation	0-0968659	Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly F and Contractors (continued)	aid Employees	5,
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) Comp	ensation
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.	Expe	nses
1 <u>N/A</u>		
2		
3		
4		
4		
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 Amo	ount
1 <u>N/A</u>		
2		
All other program-related investments. See instructions.		
		
Total. Add lines 1 through 3	>	0.
BAA	Form 99 0	0-PF (2009)

TEEA0307L 07/06/09

Form 990-PF (2009) Edwin and Jeanne Woods Family Foundation	0-0968659	Page 8
Part X Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	oreign found	
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 3	,780,063.
b Average of monthly cash balances	1b 3	,334,919.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1d 7	,114,982.
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 7	,114,982.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	106,725.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5 7	,008,257.
6 Minimum investment return. Enter 5% of line 5.	6	350,413.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private oper and certain foreign organizations check here ► ☐ and do not complete this part XI		ations
1 Minimum investment return from Part X, line 6	111	350,413.
2a Tax on investment income for 2009 from Part VI, line 5 2, 317.		
b Income tax for 2009 (This does not include the tax from Part VI)	1	
c Add lines 2a and 2b	20	2,317.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	348,096.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	348,096.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	348,096.
Part XII Qualifying Distributions (see instructions)		
 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26 	1 a	334,020.
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., 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	334,020.

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

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).

6 Adjusted qualifying distributions. Subtract line 5 from line 4

BAA

Form **990-PF** (2009)

334,020.

5 6 Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2009 from Part XI, line 7 2 Undistributed income, if any, as of the end of 2009 a Enter amount for 2008 only b Total for prior years 20, 20, 20 Excess distributions carryover, if any, to 2009	3,096.
2 Undistributed income, if any, as of the end of 2009 a Enter amount for 2008 only b Total for prior years 20, 20, 20 0.	
b Total for prior years 20, 20, 20	
3 Excess distributions carryover, if any, to 2009	
a From 2004	
b From 2005	
c From 2006 d From 2007	
e From 2008 66, 554.	
f Total of lines 3a through e. 66,554.	
4 Qualifying distributions for 2009 from Part	
XII, line 4 ► \$ 334,020.	
a Applied to 2008, but not more than line 2a	
b Applied to undistributed income of prior years	
(Election required – see instructions)	
c Treated as distributions out of corpus (Election required — see instructions) 0.	
	1,020.
e Remaining amount distributed out of corpus 0.	
	1,076.
(If an amount appears in column (d), the same amount must be shown in column (a).)	
Same simeari mast se sherii ii sesariii (eyiy	
6 Enter the net total of each column as	
indicated below:	
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5 52, 478.	 -
b Prior years' undistributed income Subtract line 4b from line 2b	·
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.	
e Undistributed income for 2008 Subtract line 4a from	
line 2a Taxable amount — see instructions 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) (see instructions) 0.	
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 0.	
9 Excess distributions carryover to 2010.	
Subtract lines 7 and 8 from line 6a 52,478.	
10 Analysis of line 9 a Excess from 2005	
b Excess from 2006	
c Excess from 2007	
d Excess from 2008. 52,478.	
e Excess from 2009	

Form 990-PF (2009) Edwin and Jeanne				20-0968659	Page 10	
Part XIV Private Operating Foundation					N/A	
1 a If the foundation has received a ruling or is effective for 2009, enter the date of the	ruling		-	n, and the ruling		
b Check box to indicate whether the founda		rating foundation d		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			
investment return from Part X for each year listed	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total	
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 assets at any time during the	(Complete this ne year – see in	part only if the structions.)	organization ha	ıd \$5,000 or moı	re in	
Information Regarding Foundation Mana a List any managers of the foundation who close of any tax year (but only if they have See Statement 5	have contributed m	ore than 2% of the than \$5,000). (See	total contributions r section 507(d)(2))	eceived by the found	dation before the	
b List any managers of the foundation who a partnership or other entity) of which the None	own 10% or more of foundation has a 1	of the stock of a cor 0% or greater intere	poration (or an equi est.	ally large portion of	the ownership of	
Check here ▶ ☐ If the foundation only	requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions,					
a The name, address, and telephone numb	er of the person to	whom applications	should be addresse	d		
Coo Statement C						
See Statement 6 b The form in which applications should be	submitted and info	rmation and materia	als they should inclu	de		
See Statement for Line 2a						
c Any submission deadlines						
See Statement for Line 2a						
d Any restrictions or limitations on awards,	such as by geograp	phical areas, charita	ble fields, kinds of	nstitutions, or other	factors	
See Statement for Line 2a				· · · · · · · · · · · · · · · · · · ·		

Form 990-PF (2009) Edwin and Jeanne Woods Family Foundation 20-0968659 Page 11 Part XV | Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation status of Recipient show any relationship to any foundation manager or substantial contributor Purpose of grant or contribution Amount recipient Name and address (home or business) a Paid during the year See Statement 7 За 331,500. **b** Approved for future payment

Total

► 3b

Uniterated	business income	Excluded by	section 512, 513, or 514	
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions
	·			
		14		
		14	127,188.	
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	····			
\		18	11,132.	
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 -				
			140 220	
<u> </u>				149,338
			. 13	149,338
calculations)			 	
e Accomplisi	hment of Exemp	pt Purpose	es	
income is reported to the	ed in column (e) of	Part XVI-A c	ontributed important	ly to the he instructions)
				<u></u>
	······································			
····	····			
	calculations)	(a) Business code Amount Amount calculations) calculations calculation	Business code Amount Exclusion code 14 14 18 18 calculations) The Accomplishment of Exempt Purpose suppose is reported in column (e) of Part XVI-A complishment in column (e) of Part XVI-A comp	(a) Business code Amount Exclusion code Amount Sign Code Amount Sign Code Si

▼	accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions)
N/A	
	<u></u>

Fo	rm 990-F	F (2009) Edwin	and <u>Jeann</u>	e Woods	Family Fou	ındat	ion		20-0968	659_	Pa	ge 13
P	art XVII	Information R	egarding T	ransfers To	and Transa	ction	s an	d Relationsl	nips With Nonch	aritable		
_		Exempt Organ	nizations							,		
	1 Did #	e organization directly	or indirectly a	andade in anv	of the followin	a with:	any of	ther organization	nn i		Yes	No
	descr	ibed in section 501(c)	of the Code (c	other than sec	tion 501(c)(3)	organiza	ations) or in section	527,			
		ng to political organiza										
		fers from the reporting	g foundation to	a noncharita	ble exempt org	anızatı	on of					
	(1) C									1 a (1)		<u>X</u>
	` '	ther assets								1 a (2)		X
		transactions.										
	` '	ales of assets to a nor		, ,						1 b (1)		X
(2) Purchases of assets from a noncharitable exempt organization								1 b (2)		X		
(3) Rental of facilities, equipment, or other assets								1 b (3)		X		
		eimbursement arrange								1b (4)		X
	- •	oans or loan guaranted erformance of services		an ar fundraid	una colinitation					1 b (5)		X
	٠,	ng of facilities, equipm		•	•		_			1 b (6) 1 c		X
	Conam	ig or facilities, equipm	ent, maning n	515, 011161 455	ets, or paid em	pioyee	5	•		16		
	d If the	answer to any of the a oods, other assets, or ansaction or sharing a	above is 'Yes,' services given	complete the	following sche	dule C	Columi	n (b) should alvation received	ways show the fair n less than fair marke	narket vali t value in	ue of	
7	a) Line no	(b) Amount involved			exempt organization				nsfers, transactions, and			
	/A	(S) THIRDSING WITCHES	1		<u> </u>		_/		iororo, danouationo, and	manning untur	igonio	
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	descr	foundation directly or ibed in section 501(c) s,' complete the follow	of the Code (d	iated with, or other than sec	related to, one tion 501(c)(3))	or mor	re tax ection	exempt organi 527?	zations	Yes	X	No
		(a) Name of organizat	tion	(b) 1	ype of organization	ation_		(0	c) Description of rela	tionship		
<u>N</u>	<u>/A</u>			ļ <u> </u>								
				 								
				 								
_				ــــــــــــــــــــــــــــــــــــــ								
	complete (alties of perjury, I declare that Declaration of preparer (other	I have examined to than taxpayer or fi	his return includin duciary) is based (ig accompanying sch on all information of	nedules ar which pre	nd state eparer h	ments, and to the b as any knowledge	est of my knowledge and b	elief, it is trud	e, correc	et, and
	•	+1 , , , ,	- 1									
5	▶ ×	Edwar Wo.	00/2				17	3/26/10	> x Presid	lenT		
102	Signa	ature of officer or trustee					Date	7	Title	_ 		
		Personals	rolo -				Date	5/,	Chock of Prepa	arer's Identify Signature in	ing num	ber (se)
HERE	Paid	Preparer's signature	A CONTRACTOR OF THE PARTY OF TH	>	ج ج		=	3/10/10	l colf —	319 11111111		. 3)
E	Pre- parer's	Firm's name (or RK T	Taylor &	Associate	S S S S S S S S S S S S S S S S S S S			/ 	EIN ► 68-042		<u>. </u>	
	Use				Suite 305		• • •		U 042	,.,		
	Only		ut Creek				·		Phone no ► (92	5) 944	-766	52

Form **990-PF** (2009)

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			
Edwin and Jeanne Woods Family	Foundation	20-0968659			
Organization type (check one)					
Filers of:	Section:				
orm 990 or 990-EZ501(c)() (enter number) organization					
4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization					
Form 990-PF	X 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 Ge	Borol Dule or a Second Bule				
Note: Only a section 501(c)(7), (8), or (10) orga	inization can check boxes for both the General Rule and	d a Special Rule See instructions			
General Rule -					
	, or 990-PF that received, during the year, \$5,000 or mo	are (in many or area at) from any			
contributor (Complete Parts I and II)	, or 990-FF that received, during the year, \$5,000 or mo	ore (in money or property) from any one			
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)/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) organiza	ation filing Form 990 or 990-EZ, that received from any	one contributor, during the year,			
aggregate contributions of more than \$1,000 prevention of cruelty to children or animals	ofor use <i>exclusively</i> for religious, charitable, scientific, Complete Parts I, II, and III.	literary, or educational purposes, or the			
contributions for use exclusively for religious	ation filing Form 990 or 990-EZ, that received from any s, charitable, etc, purposes, but these contributions did	not aggregate to more than \$1,000. If			
this box is checked, enter here the total con	ntributions that were received during the year for an exc unless the General Rule applies to this organization bec	lusively religious, charitable, etc.			
religious, charitable, etc, contributions of \$5		► \$			
Caution: An organization that is not covered by	the General Rule and/or the Special Rules does not file	Schedule B (Form 990, 990-F7, or			
990-PF) but it must answer 'No' on Part IV, line 2 of their 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)					
BAA For Privacy Act and Paperwork Reduction for Form 990, 990EZ, or 990-PF.	on Act Notice, see the Instructions Scho	edule B (Form 990, 990-EZ, or 990-PF) (2009)			

Edwin	and Jeanne Woods Family Foundation	20-09	968659
Part I	Contributors (see instructions.)		
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Edwin & Jeanne Woods P.O. Box 491 Santa Maria, CA 93456,	\$1,000,000.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)

Schedule **B** (Form 990, 990-EZ, or 990-PF) (2009) Name of organization

Page_1

of 1

Employer identification number

of Part I

of 1

of Part II

Edwin and Jeanne Woods Family Foundation

Employer identification number 20-0968659

Part II	Noncash Property (see instructions.)		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$]
		3	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

20-0968659

Edwin and Jeanne Woods Family Foundation

Employer identification number

Part III Exclusively religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete cols (a) through (e) and the following line entry)

	For organizations completing Part III, enter contributions of \$1,000 or less for the year		see instructio		N/A	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	!	(d) Description of how gift is held		
	N/A					
						
		(e)				
	Transferee's name, addres	Transfer of gift s, and ZIP + 4	Relat	tionship of transferor to tran	nsferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gi	ift is held	
	Transferee's name, addres	Relationship of transferor to transferee				
						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held		
	(e) Transfer of gift Transferee's name, address, and ZIP + 4			tionship of transferor to tra	nsferee	
				······································		
(a) No. from Part I	(b) (c) Purpose of gift Use of			(d) Description of how g	ift is held	
		(e)				
	Transferee's name, addres	Transfer of gift	Rela	tionship of transferor to tra	nsferee	
			<u> </u>			

2009	Federal Statements	Page 1	
Client 15000	Edwin and Jeanne Woods Family Foundation	20-0968659	
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees	(a) (b) Net (c)	(d)	
Accounting Fees	Expenses Investment Adjusted per Books Income Net Income \$ 4,450. \$ 2,225.	Charitable	
Statement 2 Form 990-PF, Part I, Line 16c Other Professional Fees			
Investment management	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 31,276. \$ 31,276. \$ 31,276. \$ 31,276.	(d) Charitable Purposes \$ 0.	
Statement 3 Form 990-PF, Part I, Line 18 Taxes			
Excise Tax Filing Fee Franchise Tax Board	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 1,600. 150. 10. Total \$ 1,760. \$ 0.	(d) Charitable Purposes \$ 150.	
Statement 4 Form 990-PF, Part I, Line 23 Other Expenses			
Bank fee Office Expenses	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 40. 95. Total \$ 135. \$ 0.	(d) Charitable Purposes \$ 40. 95. \$ 135.	

2009

Federal Statements

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Client 15000

Edwin and Jeanne Woods Family Foundation

20-0968659

Statement 5 Form 990-PF, Part XV, Line 1a Foundation Managers - 2% or More Contributors

Edwin Newhall Woods Jeanne Portnoff Woods

Statement 6 Form 990-PF, Part XV, Line 2a-d **Application Submission Information**

Name of Grant Program:

Name: Care Of:

PO Box 491

Street Address: City, State, Zip Code:

Santa Maria, CA 93456

Telephone:

Form and Content:

Upon written request, the Foundation will furnish

application materials to potential applicants.

Submission Deadlines:

Restrictions on Awards:

Generally, grants will be made to organizations in Northern Santa Barbara County.

Statement 7 Form 990-PF, Part XV, Line 3a **Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation <u>Status</u>	Purpose of Grant	 Amount
Agriculture in Classroom Sacramento, CA		Public		\$ 12,000.
Woods Humane Society Santa Barbara, CA		Public		5,000.
PCPA Foundation Santa Maria, CA		Public		25,000.
SM Philharmonic Society Santa Maria, CA		Public		30,000.
SM Valley Discovery Museum Santa Maria, CA		Public		15,000.
Santa Maria YMCA Santa Maria, CA		Public		16,000.
California 4H Fdn Sacramento, CA		Public		5,000.

2009	Federal Statements	Page 3
Client 15000 E	dwin and Jeanne Woods Family Fo	undation 20-0968659
Statement 7 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year		
Name and Address	Found- Donee ation <u>Relationship Status</u>	Purpose of
Orcutt Children's Art Fdn Orcutt, CA	Public	\$ 8,000.
Food Bank of SBC Santa Barbara, CA	Public	10,000.
Marian Medical Center Santa Maria, CA	Public	50,000.
Pacific Wildlife Care Morro Bay, CA	Public	10,000.
Santa Maria Valley Humane Santa Maria, CA	Public	25,000.
Comm. Partners in Caring Santa Maria, CA	Public	3,000.
Central Coast Literacy Council Santa Maria, CA	Public	3,000.
Comm. for Senior Citizens Santa Maria, CA	Public	7,500.
Santa Maria Public Librar Santa Maria, CA	y Public	5,000.
Rescue Mission Alliance Santa Maria, CA	Public	7,000.
Therapeutic Riding Progra Santa Maria, CA	m Public	5,000.
VTC Enterprises Santa Maria, CA	Public	2,000.
CASA Santa Barbara Santa Barbara, CA	Public	5,000.
DANA Nipomo, CA	Public	15,000.
Palliative Care Santa Maria, CA	Public	25,000.
SMOOTH Santa Maria, CA	Public	3,000.
Mental Heath Association Santa Maria, CA	Public	15,000.

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2009 **Federal Statements** Page 4 **Edwin and Jeanne Woods Family Foundation Client 15000** 20-0968659 Statement 7 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year Found-Donee ation Purpose of Name and Address Relationship <u>Status</u> <u> Ġrant</u> Amount Domestic Violence Solutions Public \$ 20,000. Santa Maria, CA Santa Barbara Foundation Public 5,000. Santa Barbara, CA Total \$ 331,500.