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**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 Intertech Group Foundation, Inc		A Employer identification number 20-1473099
	Number and street (or P O box number if mail is not delivered to street address) 4838 Jenkins Avenue	Room/suite	B Telephone number (see page 10 of the instructions) (843) 744-5174
	City or town, state, and ZIP code N Charleston SC 29405		C If exemption application is pending, check here ☐
	H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 1,802,207		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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) (see page 11 of the instructions))		(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 (attach schedule)	76,500			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	0	0		
	4 Dividends and interest from securities	79,341	79,341		
	5 a Gross rents		0		
	b Net rental income or (loss)	0			
	6 a Net gain or (loss) from sale of assets not on line 10	10,566			
	b Gross sales price for all assets on line 6a	107,833			
	7 Capital gain net income (from Part IV, line 2)		10,566		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10 a Gross sales less returns and allowances	0			
b Less Cost of goods sold	0				
c Gross profit or (loss) (attach schedule)	0				
11 Other income (attach schedule)	4,344	4,344	0		
12 Total. Add lines 1 through 11	170,751	94,251	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16 a Legal fees (attach schedule)	0	0	0	0
	b Accounting fees (attach schedule)	1,200	1,200	0	0
	c Other professional fees (attach schedule)	0	0	0	0
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	5,442	5,442	0	0
	19 Depreciation (attach schedule) and depletion	0	0	0	
	20 Occupancy				
	21 Travel, conferences, and meetings	25	25		
	22 Printing and publications	57	57		
	23 Other expenses (attach schedule)	557	557	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	7,281	7,281	0	0
	25 Contributions, gifts, grants paid	73,925			73,925
26 Total expenses and disbursements. Add lines 24 and 25	81,206	7,281	0	73,925	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	89,545				
b Net investment income (if negative, enter -0-)		86,970			
c Adjusted net income (if negative, enter -0-)			0		

8 18

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶	0			
		Less allowance for doubtful accounts ▶	0	0	0	0
	4	Pledges receivable ▶	0			
		Less allowance for doubtful accounts ▶	0	0	0	0
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)		0	0	0
	7	Other notes and loans receivable (attach schedule) ▶	0			
		Less allowance for doubtful accounts ▶	0	0	0	0
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		1,532		
	10 a	Investments—U S and state government obligations (attach schedule)		0	0	0
	b	Investments—corporate stock (attach schedule)		1,422,983	1,802,207	1,802,207
	c	Investments—corporate bonds (attach schedule)		0	0	0
	Liabilities	11	Investments—land, buildings, and equipment basis ▶	0		
		Less accumulated depreciation (attach schedule) ▶	0	0	0	0
12		Investments—mortgage loans				
13		Investments—other (attach schedule)		0	0	0
14		Land, buildings, and equipment basis ▶	0			
		Less accumulated depreciation (attach schedule) ▶	0	0	0	0
15		Other assets (describe ▶)		0	0	0
16		Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		1,424,515	1,802,207	1,802,207
17		Accounts payable and accrued expenses			6,893	
18		Grants payable				
19		Deferred revenue				
Net Assets or Fund Balances	20	Loans from officers, directors, trustees, and other disqualified persons		0	0	
	21	Mortgages and other notes payable (attach schedule)		0	0	
	22	Other liabilities (describe ▶)		0	0	
	23	Total liabilities (add lines 17 through 22)		0	6,893	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☒				
	24	Unrestricted		1,424,515	1,795,314	
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☐				
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds					
30	Total net assets or fund balances (see page 17 of the instructions)		1,424,515	1,795,314		
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)		1,424,515	1,802,207		

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	1,424,515
2	Enter amount from Part I, line 27a	2	89,545
3	Other increases not included in line 2 (itemize) ▶ Unrealized appreciation	3	281,254
4	Add lines 1, 2, and 3	4	1,795,314
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,795,314

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 attached schedule				
b				
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 107,833	0	97,267	10,566	
b 0	0	0	0	
c 0	0	0	0	
d 0	0	0	0	
e 0	0	0	0	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a 0	0	0	10,566	
b 0	0	0	0	
c 0	0	0	0	
d 0	0	0	0	
e 0	0	0	0	
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	10,566
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) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8.			3	0

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 page 18 of the 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	118,512	1,802,139	0.065762
2007	139,610	2,358,426	0.059196
2006	90,057	2,274,256	0.039598
2005	123,824	2,037,802	0.060764
2004	2,500	2,014,689	0.001241
2 Total of line 1, column (d)			2 0.226561
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 0.045312
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 1,733,585
5 Multiply line 4 by line 3			5 78,552
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 870
7 Add lines 5 and 6			7 79,422
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 on page 18			8 73,925

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		1	1,739
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ 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 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	1,739
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	1,739
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4,532	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	0	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	4,532	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,793	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	11	2,793	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the 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
c 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
4 a 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?	N/A	
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 XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☐ SC		
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 on page 27)? 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		X

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 page 20 of the 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 **► N/A**

The books are in care of **► THE INTERTECH GROUP, INC.** Telephone no **► (843) 744-5174**

Located at **► 4838 JENKINS AVENUE NORTH CHARLESTON SC** ZIP+4 **► 29405**

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**

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

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?
- (3) Provide a grant to an individual for travel, study, or other similar purposes?
- (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)? (see page 22 of the instructions)
- (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

☐ Yes ☒ No

☐ Yes ☒ No

☐ Yes ☒ No

☐ 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 page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐

5b

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?

☐ 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? If "Yes" to 6b, file Form 8870

6b

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?

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 (see page 22 of the instructions).

(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
Anita G. Zucker 4838 Jenkins Avenue N. Charleston SC 29405	Director 2.00	0	0	0
Jonathan M. Zucker 4838 Jenkins Avenue N. Charleston SC 29405	Director 2.00	0	0	0
Andrea Z. Muzin 4838 Jenkins Avenue N. Charleston SC 29405	Director 2.00	0	0	0
Jeffrey M. Zucker 4838 Jenkins Avenue N. Charleston SC 29405	Director 2.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). 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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		0
		0
		0
		0
		0
		0
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 DURING 2009, THE INTERTECH GROUP FOUNDATION, INC. MADE CONTRIBUTIONS TO 54 CHARITABLE ORGANIZATIONS INCLUDING THE TRIDENT UNITED WAY, HOSPICE OF CHARLESTON CAROLINA YOUTH DEVELOPMENT CENTER AND CRISIS MINISTRIES	73,925
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	0
Total. Add lines 1 through 3	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	1,615,742
b	Average of monthly cash balances	1b	144,243
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	1,759,985
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,759,985
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	26,400
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,733,585
6	Minimum investment return. Enter 5% of line 5	6	86,679

Part XI Distributable Amount (see page 25 of the 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	86,679
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,739
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,739
3	Distributable amount before adjustments Subtract line 2c from line 1	3	84,940
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	84,940
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	84,940

Part XII Qualifying Distributions (see page 25 of the 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	73,925
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	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	73,925
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 page 26 of the instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	73,925

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

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				84,940
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			41,709	
b Total for prior years 20 05 , 20 06 , 20 07		72,418		
3 Excess distributions carryover, if any, to 2009				
a From 2004	0			
b From 2005	0			
c From 2006	0			
d From 2007	0			
e From 2008	0			
f Total of lines 3a through e	0			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 73,925				
a Applied to 2008, but not more than line 2a			41,709	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2009 distributable amount				32,216
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		72,418		
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				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		72,418		
e Undistributed income for 2008. Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				52,724
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2005	0			
b Excess from 2006	0			
c Excess from 2007	0			
d Excess from 2008	0			
e Excess from 2009	0			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)**N/A**

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



b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Tax year	Prior 3 years			(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
				0
0	0	0	0	0
				0
0	0	0	0	0
				0
0	0	0	0	0
				0
				0
				0
				0

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

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

Anita G. Zucker

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

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

Board of Directors 4838 Jenkins Avenue N Charleston SC 29405 (843) 744-5174

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

Grant Application

c Any submission deadlines

None

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

None

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See attached schedule			Support	73,925
Total			▶ 3a	73,925
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions on page 28 to verify calculations.)

[illegible]

Form **990-PF** (2009)

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

OMB No 1545-0047

2009

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

Name of the organization

Employer identification number

The Intertech Group Foundation, Inc

20-1473099

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization The Intertech Group Foundation, Inc	Employer identification number 20-1473099
---	--

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	InterTech Group, Inc 4838 Jenkins Avenue N Charleston SC 29405 Foreign State or Province Foreign Country	\$ 75,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
2	Jerry Zucker Revocable Trust 4838 Jenkins Avenue N Charleston SC 29405 Foreign State or Province Foreign Country	\$ 1,500	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
3	 Foreign State or Province Foreign Country	\$ 0	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
4	 Foreign State or Province Foreign Country	\$ 0	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
5	 Foreign State or Province Foreign Country	\$ 0	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
6	 Foreign State or Province Foreign Country	\$ 0	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Totals

[illegible]

Line 11 (990-PF) - Other Income

4,344				4,344	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	
1	Royalties	5,554	5,554		
2	Partnership	-1,210	-1,210		
3			0		
4			0		
5			0		
6			0		
7			0		
8			0		
9			0		
10			0		

Line 16b (990-PF) - Accounting Fees

		1,200	1,200	0	0
	Name of Organization or Person Providing Service	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	Barry A Emerson	1,200	1,200		
2					
3					
4					
5					
6					
7					
8					
9					
10					

Line 18 (990-PF) - Taxes

		5,442	5,442	0	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1					
2	Tax on investment income	3,000	3,000		
3					
4	Foreign tax paid	2,442	2,442		
5					
6					
7					
8					
9					
10					

Line 23 (990-PF) - Other Expenses

		557	557	0	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Amortization See attached statement	0	0	0	0
2					
3	Other	557	557		
4					
5					
6					
7					
8					
9					
10					

Part II, Line 10b (990-PF) - Investments - Corporate Stock

	Description	Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year
1	SEE ATTACHED		1,422,983	1,802,207	1,430,738	1,802,207
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

	Kind(s) of Property Sold see attached schedule	CUSIP #	How Acquired	Date Acquired	Date Sold	Totals	Gross Sales Price	Depreciation Allowed	Cost or Other Basis Plus Expense of Sale	Gain or Loss	FMV as of 12/31/69	Adjusted Basis as of 12/31/69	Excess of FMV Over Adj Basis	Gains Minus Excess of FMV Over Adjusted Basis or Losses
1							107,833	0	97,267	10,566			0	10,566
2							0	0	0	0			0	0
3							0	0	0	0			0	0
4							0	0	0	0			0	0
5							0	0	0	0			0	0
6							0	0	0	0			0	0
7							0	0	0	0			0	0
8							0	0	0	0			0	0
9							0	0	0	0			0	0
10							0	0	0	0			0	0

Did the foundation furnish a copy of Form 990-PF to the State Attorney General? ☐ Yes ☒ No

SC Attorney General has advised this action is not required.

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

[illegible]

Part

	0	0	0	0
	Compensation	Benefits	Expense Account	Explanation
1	0	0	0	
2	0	0	0	
3	0	0	0	
4	0	0	0	
5				
6				
7				
8				
9				
10				

Part XVI-A, Lines 11a-11e (990-PF) - Other Revenue

		Unrelated Business Income		Excluded by Section 512, 513, or 514		
	Program Service Revenue	Business Code	Amount	Exclusion Code	Amount	Related or Exempt Function Income
1	Royalties			14	5,554	
2	Partnership			14	-1,210	
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Statement of Account: December 1, 2009 to December 31, 2009

Account Number: 19040492 Financial Advisor: CN37
BROOKS B JOHNSON

THE INTERTECH GRP FOUND. INC.

Portfolio Positions Prices are provided as a general guideline and may not reflect the actual current price. Refer to the disclosure on the back of this statement regarding the price/value presented.

Cost basis and the associated gain/loss for unrealized open positions are provided on this statement for informational purposes only. This statement is not a tax document and should not be used for tax preparation.

Equities

Lang	Quantity	Short	Description	Symbol	Cusip	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
200			ARLINGTON ASSET	AI		2	15.230	3,046.00	77,725.00	-74,679.00		
			INVESTMENT CORP CL A NEW									
58			AT&T INC	T		2	28.030	1,625.74	1,206.86	418.88	97	5.99
2,000			BAC CAPITAL TRUST V	BACY		2	19.500	39,000.00	49,841.00	-10,841.00	3,000	7.69
			PFD 6%									
1,000			BANK MCKENNEY VIRGINIA	BOMK		1	5.000	5,000.00	10,785.00	-5,785.00	270	5.40
1,500			BANK OF AMERICA CORP	BAC		1	15.060	22,590.00	75,365.00	-52,775.00	60	0.27
500			BANK OF NOVA SCOTIA	BNS		2	46.740	23,370.00	15,310.00	8,060.00	927	3.97
			HALIFAX									
500			BARCLAYS PLC ADR	BCS		2	17.600	8,800.00	19,180.00	-10,380.00		
1,000			BB&T CORP	BBT		2	25.370	25,370.00	39,725.00	-14,355.00	600	2.37
2,000			BLACKROCK CREDIT	BPP		2	10.270	20,540.00	49,757.00	-29,217.00	1,740	8.47
			ALLOCATION INCOME TRUST									
			III									
10,000			BRICK BREWING COMPANY	BIBLF		1	0.630	6,295.00	19,765.00	-13,470.00		

Portfolio Positions (continued)

Equities (continued)

Long	Quantity	Short	Description	Symbol	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
1,500			BRISTOL MYERS SQUIBB COMPANY	BMJ	2	25.250	37,875.00	36,035.00	1,840.00	1,920	5.07
2,000			CENTRAL VERMONT PUBLIC SERVICE CORP	CV	2	20.800	41,600.00	42,366.00	-766.00	1,840	4.42
2,000			CITIGROUP CAPITAL XI TRUST PFD SECURITIES 6%	CQ	2	17.850	35,700.00	49,976.00	-14,276.00	3,000	8.40
1,575			COMMUNITY BANCORP INC VT	CMTV	1	8.500	13,387.50	20,672.17	-7,284.67	756	5.65
500			CPFL ENERGIA S A SPONSORED ADR	OPL	1	61.780	30,890.00	27,679.00	3,211.00	1,863	6.03
500			DIAGEO PLC NEW SPONSORED ADR	DEO	2	69.410	34,705.00	26,495.00	8,210.00	1,118	3.22
500			DIAMONDS TR UNIT SER 1 B/E	DIA	2	104.070	52,035.00	49,725.00	2,310.00	1,404	2.70
1,000			DILLARDS CAP TR I PFD 7.5%	DDT	2	19.012	19,011.80	24,728.00	-5,716.20	1,875	9.86
2,000			DUKE REALTY PERPETUAL PFD CORP 6.5% DEP SHARES	DREK	1	18.850	37,700.00	50,244.00	-12,544.00	3,250	8.62
1,111,952			REPSTG 1/10TH PFD SER K FIRST HORIZON NATIONAL CORP	FHN	2	13.400	14,900.15	N/A			

Portfolio Positions (continued)

Equities (continued)

Long	Quantity	Short	Description	Symbol Cusip	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
1,000			FPL GROUP CAPITAL INC A	FGC	1	25.690	25,690.00	25,265.00	425.00	1,650	6.42
			ENHANCED JUNIOR SUB								
			DEBENTURE CUMULATIVE 6.6								
500			GANNETT COMPANY INC DE	GCI	2	14.850	7,425.00	40,665.00	-33,240.00	80	1.08
1,500			GENERAL ELECTRIC COMPANY	GE	2	15.130	22,695.00	50,330.00	-27,635.00	600	2.64
1,000			HERSHEY COMPANY	HSY	1	35.790	35,790.00	36,085.00	-295.00	1,190	3.32
1,416			HSBC HOLDINGS PLC	HBC	2	57.090	80,839.44	N/A		2,407	2.98
			SPONSORED ADR NEW								
500			INGLES MARKETS	IMKTA	1	15.130	7,565.00	13,201.00	-5,636.00	330	4.36
			INC CLASS A								
1,500			ISHARES DOW JONES	DVY	2	43.910	65,865.00	85,745.00	-19,880.00	2,491	3.78
			SELECT DIVIDEND INDEX								
			FUND								
200			ISHARES IBOX	LQD	2	104.150	20,830.00	20,895.00	-65.00	1,145	5.50
			\$INVESTMENT GRADE CORP								
			BOND FUND								
2,000			J P MORGAN CHASE COMPANY	JPMY	2	24.050	48,100.00	50,005.00	-1,905.00	3,100	6.44
			CAPITAL XIV 6.2%								
			CAP SECURITIES SERIES N								

Portfolio Positions (continued)

Equities (continued)

Long	Quantity	Short	Description	Symbol	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
1,500			JOURNAL COMMUNICATIONS INC	JRN	2	3.890	5,835.00	23,732.00	-17,897.00	120	2.06
2,000			KEYSTONE NORTH AMERICA INC NEW	KNAIF	1	7.520	15,040.00	13,165.00	1,875.00	1,590	10.58
1,000			KRAFT FOODS CLASS A	KFT	2	27.180	27,180.00	29,775.00	-2,595.00	1,160	4.27
512			LLOYDS BANKING GROUP PLC SPONSORED ADR	LYG	2	3.270	1,674.24	N/A			
1,000			MAGUIRE PROPERTIES CUMULATIVE REDEEMABLE PERPETUAL PFD 7.625%	MPG'A	1	7.000	7,000.00	24,925.00	-17,925.00		
1,000			MAGYAR TELEKOM TELECOMMUNICATIONS PLC	MTA	1	19.100	19,100.00	23,371.00	-4,271.00	1,788	9.36
2,500			MEDALLION FINL CORP	TAXI	2	8.170	20,425.00	28,452.50	-8,027.50	1,900	9.30
500			MEDIA GENERAL INC CLASS A	MEG	1	7.840	3,920.00	18,860.00	-14,940.00		
1,000			MERCHANTS BANC SHS INC VT	MBVT	1	22.640	22,640.00	22,489.00	151.00	1,120	4.95
2,000			N H THRIFT BANC SHS INC	NHTB	1	9.690	19,380.00	28,810.00	-9,430.00	1,040	5.37

THE INTERTECH GRP FOUND. INC.

Portfolio Positions (continued)

Equities (continued)

Long	Quantity	Short	Description	Symbol Cusip	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
1,000			NATIONAL CITY CAPITAL TRUST III PREFERRED 6.625% 05/25/47	NCCB	2	21.750	21,750.00	18,555.00	3,195.00	1,656	7.61
500			NORTHERN PPTY REAL ESTATE INVT TR UNIT	NPRUF	1	20.999	10,499.50	6,761.00	3,738.50	701	6.69
1,000			PENN WEST ENERGY TRUST UNIT	PWE	2	17.600	17,600.00	26,464.90	-8,864.90	1,704	9.68
1,000			PFIZER INC	PFE	2	18.190	18,190.00	27,405.00	-9,215.00	720	3.96
3,000			PROSHARES TRUST PROSHARES UL TRA FINANCIALS	UYG	2	5.630	16,890.00	9,365.00	7,525.00	115	0.69
2,000			RBS CAPITAL FUNDING TRUST VII GTD TRUST PFD 6.08%	RBSG	2	10.000	20,000.00	49,345.00	-29,345.00	3,040	15.20
1,000			REAVES UTILITY INCOME FUND	UTG	1	18.560	18,560.00	24,194.90	-5,634.90	1,380	7.44
2,000			RITE AID CORP	RAD	2	1.510	3,020.00	11,025.00	-8,005.00		
1,000			ROYAL BANK OF SCOTLAND GRP PLC NON CUMUL DOLLAR PERP PREF SHARES Q 6.75%	RBSQ	1	10.982	10,981.50	24,285.00	-13,303.50	1,687	15.37

Statement of Account: December 1, 2009 to December 31, 2009

Account Number: 18040492 Financial Advisor: CN37
BROOKS B JOHNSON

THE INTERTECH GRP FOUND. INC.

Portfolio Positions (continued)

Equities (continued)

Long	Quantity	Short	Description	Symbol Cusip	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
2,000			SANOI AVENTIS	SNY	2	39.270	78,540.00	73,880.00	4,860.00	2,127	2.71
			SPONSORED ADR								
2,000			SATURNS GOLDMAN SACHS CAPITAL 104-4 PFD 6%	HJJ	2	21.290	42,580.00	47,966.00	-5,386.00	3,000	7.05
2,000			SAVANNAH ELECTRIC & POWER COMPANY SENIOR NOTE SERIES G 5.75% FGIC	SVJ	2	25.050	50,100.00	49,860.00	240.00	2,875	5.74
5,000			SIR ROYALTY INCOME FUND UNIT	SIRZF	1	7.249	36,246.50	40,155.00	-3,908.50	6,544	18.06
2,000			SOUTHERN COMPANY	SO	2	33.320	66,640.00	65,885.00	755.00	3,500	5.25
1,000			SOUTHERN UNION COMPANY NONCUMULATIVE PFD SER A DP SH RPSTG 1/10TH 7.55%	SUGC	1	25.000	25,000.00	24,435.00	565.00	1,887	7.55
4,000			STANDARD LIFE PLC EDINBURGH ORDINARY SHARES	SLFPF	1	3.350	13,400.00	22,725.00	-9,325.00	1,115	8.32
1,500			TORSTAR CORP CLASS B	TORSF	1	6.038	9,056.85	26,540.00	-17,483.15	525	5.80
1,500			TUESDAY MORNING CORP NEW	TUES	1	2.580	3,870.00	25,100.00	-21,230.00		
1,000			UNION BANKSHARES VERMONT	UNB	2	16.950	16,950.00	21,040.00	-4,090.00	1,000	5.90

Statement of Account: December 1, 2009 to December 31, 2009

Account Number: 19040492 Financial Advisor: CN37
BROOKS B JOHNSON

THE INTERTECH GRP FOUND. INC.

Portfolio Positions (continued)

Equities (continued)

Long	Quantity	Short	Description	Symbol Cusip	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
1,545			UNITED UTILITIES GROUP	UUGRY	2	16.220	25,059.90	N/A		1,860	6.62
			PLC SPONSORED ADR								
100			VANGUARD SPECIALIZED	VIG	2	46.860	4,686.00	4,932.00	-246.00	97	2.09
			PORTFOLIOS DIVIDEND								
			APPECIATION ETF								
2,000			WELLS FARGO & CO NEW	WFC	2	26.990	53,980.00	59,515.00	-5,535.00	400	0.74

Total for Equities

Total for Equities with cost data

1,494,035.12	81,164	5.43
1,371,561.38	1,881,573.33	-510,011.94

Fixed Income

Long	Quantity	Short	Description	Symbol Cusip/Rating	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
10,000			HSBC FINANCE CORP	40429CCX8	1	103.530	10,353.00	8,876.00	1,478.00	525	5.07
			NOTE B/E SEMI	S&P A MOODY A3							
			CPN 5.250% DUE 01/14/11								
			DTD 11/29/05 FC 01/14/06								
10,000			ALCOA INC	013817AD3	1	105.446	10,544.60	9,345.00	1,199.60	650	6.16
			NOTE SEMI	S&P: BBB- MOODY BAA3							
			CALL @ MAKE WHOLE +20BP								
			CPN 6.500% DUE 06/01/11								
			DTD 05/23/01 FC 12/01/01								

Statement of Account: December 1, 2009 to December 31, 2009

Account Number: 19040492 Financial Advisor: CN37
BROOKS B JOHNSON

THE INTERTECH GRP FOUND. INC.

Portfolio Positions (continued)

Fixed Income (continued)

Quantity		Short	Description	Symbol	Cusip/Rating	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
Long												
10,000			CATERPILLAR FINL SVCS POWERNOTES B/E SEMI SURVIVOR OPTION CPN 5.100% DUE 03/15/12 DTD 03/12/09 FC 09/15/09	14912HNR7 S&P: A MOODY: A2	1	104.069	10,406.90	10,000.00	406.90	510	4.90	
10,000			NATIONAL RURAL UTILITIES INTERNOTES B/E SEMI SURVIVOR OPTION CPN 4.500% DUE 03/15/12 DTD 03/12/09 FC 09/15/09	63743FKK1 S&P: A MOODY: A2	1	104.024	10,402.40	10,000.00	402.40	450	4.33	
10,000			AMERICAN EXPRESS BANK FSB MEDIUM TERM NOTE B/E CPN 5.550% DUE 10/17/12 DTD 10/17/07 FC 04/17/08	02580ECG6 S&P: BBB+ MOODY: A2	1	106.943	10,694.30	8,925.00	1,769.30	555	5.19	
10,000			WHIRLPOOL CORP MEDIUM TERM NOTE B/E CPN 5.500% DUE 03/01/13 DTD 02/28/08 FC 09/01/08	96332HCA5 S&P: BBB- MOODY: BAA3	1	102.973	10,297.30	9,700.00	597.30	550	5.34	
10,000			FORTUNE BRANDS INC NOTE B/E CPN 4.875% DUE 12/01/13 DTD 11/20/03 FC 06/01/04	349631AK7 S&P: BBB- MOODY: BAA3	1	102.143	10,214.30	9,512.50	701.80	487	4.77	

INTERTECH

Portfolio Positions (continued)

Fixed Income (continued)

Long	Quantity	Short	Description	Symbol Cusip/Rating	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
10,000			DOW CHEMICAL COMPANY	26054L FW8 S&P: BBB- MOODY: BAA3	1	101.150	10,115.00	10,000.00	115.00	760	7.51
			INTERNOTES B/E SEMI SURVIVOR OPTION								
			CPN 7.600% DUE 05/15/14								
			DTD 05/21/09 FC 11/15/09								
			CALL 05/15/10 @ 100.000								
10,000			INTERNATIONAL PAPER COMPANY NOTE B/E	460146CB7 S&P: BBB MOODY: BAA3	1	111.384	11,138.40	8,675.00	2,463.40	740	6.64
			CPN 7.400% DUE 06/15/14								
			DTD 06/04/08 FC 12/15/08								
Total for Fixed Income											
							94,166.20			5,227	5.55
Total for Fixed Income with cost data							94,166.20	85,032.50	9,133.70		

Options, Rights, Warrants

Long	Quantity	Short	Description	Symbol Cusip	Account Type	Price	Market Value	Cost	Unrealized Gains/Loss	Estimated Annual Income	Estimated Yield
		15	CALL BRISTOL MYERS \$25 EXP 03/20/10 SQUIBB COMPANY	BMYCE	6	1.400	-2,100.00	819.97	-1280.03		
		10	CALL HERSHEY COMPANY \$40 EXP 05/22/10	HSYEH	1	0.550	-550.00	649.98	99.98		
		10	CALL PFIZER INCORPORATED \$20 EXP 03/20/10	PFECB	6	0.260	-260.00	299.99	39.99		



Statement of Account: December 1, 2009 to December 31, 2009

Account Number: 19040492 Financial Advisor: CN37
BROOKS B JOHNSON

THE INTERTECH GRP FOUND. INC.

Portfolio Positions (continued)

Options, Rights, Warrants (continued)

Quantity	Short	Description	Symbol	Account	Price	Market Value	Cost	Unrealized	Estimated	Estimated
Long			Cusip	Type				Gains/Loss	Annual Income	Yield
	20	CALL SANOFI-AVENTIS	SNYCI	6	0.200	-400.00	849.97	449.97		
		\$45 EXP 03/20/10								

Total for Options, Rights, Warrants

Total for Options, Rights, Warrants with cost data

Limited Partnerships

Quantity	Short	Description	Symbol	Account	Price	Market Value	Cost	Unrealized	Estimated	Estimated
Long			Cusip	Type				Gains/Loss	Annual Income	Yield
1,000		ENBRIDGE ENERGY PARTNERS	EEP	2	53.690	53,690.00	30,110.00	23,580.00	3,960	7.38
		LTD PARTNERSHIP								

Total for Limited Partnerships

Total for Limited Partnerships with cost data

Mutual Funds

Quantity	Short	Description	Symbol	Account	Price	Market Value	Cost	Unrealized	Estimated	Estimated
Long			Cusip	Type				Gains/Loss	Annual Income	Yield
620.221		WEXFORD TR	MUHLX	2	50.690	31,439.00	45,125.96	-13,686.96	88	0.28
		MUHLKAMP FD								

Total for Mutual Funds

Total for Mutual Funds with cost data

INTERTECH

The InterTech Group Foundation, Inc.
Vendor Ledgers
For the Period From Jan 4, 2009 to Jan 2, 2010

Filter Criteria includes: Report order is by ID

The InterTech Group Foundation, Inc.
Vendor List for Grants Paid in 2009

Vendor	Contact	Telephone 1	Address line 1	Address line 2	City ST ZIP	Fed. ID #
American Lung Association of SC	Karina Taylor	843-556-8451	Oxygen Ball	1941 Savage Road Suite 200-A	Charleston, SC 29414	59-0662271
Boys and Girls Club of the Trident Area	Lanneau Sieging	843-937-8517	75 Calhoun Street, 2nd Floor		Charleston, SC 29403	57-6026195
Camp Happy Days, Inc.	Laura Rayl	843-571-4336	Attn Amy Ethridge	1622 Ashley Hall Road	Charleston, SC 29407	57-0755466
Carolina Youth Development Ctr.	Kate Lloyd	843-266-5222	5055 Lackawanna Boulevard		N Charleston, SC 29405	57-0669877
Charleston Animal Society	Marc Edwards	843-747-4849	2455 Remount Road		N Charleston, SC 29406	57-6021863
Charleston County School District	Robin McCrae	843-937-6457	Office of CTE	75 Calhoun Street	Charleston, SC 29401	57-6000322
Charleston Habitat For Humanity	Stacia Bannerman	843-722-7145	731 Meeting Street		Charleston, SC 29413-1479	57-0889919
Charleston Trident Urban League	Olha Meadows	843-965-4037	P O Box 20249		Charleston, SC 29413	57-0661628
Chicora Elementary School	Camille Lee	843-746-2210	1912 Success Street		N Charleston, SC 29405	57-6000322
Children's Museum of the Lowcountry	Jennifer Lorenz	843-853-8962	25 Ann Street		Charleston, SC 29403	57-1014498
City of Charleston	Rep Wendell Gillia	843-720-1987	Project Cool Breeze	288 Meeting Street	Charleston, SC 29401	57-6000226
City of North Charleston	Ann Simmons	843-745-1087	P O Box 190016	Cultural Arts Department	North Charleston, SC 29419-9016	57-0545285
Coastal Community Foundation of SC	George Stevens	843-723-3536	90 Mary Street		Charleston, SC 29403	23-7390313
The Coastal Crisis Chaplaincy	Claire Gallin	843-724-1212	P O Box 21833		Charleston, SC 29413	57-0989842
Crisis Ministries	Stacey Denaux	843-723-9477	Stacey Denaux	P O Box 20038	Charleston, SC 29413-0038	57-0989843
Dee Norton Lowcountry Children's Ctr	Elizabeth Raulston	843-723-3600	1061 King Street		29403, SC	57-0905724
Dorchester Sch Dist 2 Extended Day Pro	Tina Padgett	843-873-7372	Dorchester Adult Education	1325 A Boone Hill Road	Summerville, SC 29483	57-6001626
Dorchester Habitat For Humanity	Donna Cartwright	843-851-1414	P O Box 1685		Summerville, SC 29484	57-0978123
Dorchester School District Two	Pat Raynor	843-873-2901	102 Greenwave Boulevard		Summerville, SC 29483	57-6001626
Down Syndrome Assoc of the Lowcountry	Coby Mazingo	843-881-2465	295 Seven Farms Drive	Suite C-190	Daniel Island, SC 29492	20-1180545
Dragon Boat Charleston	Sterling Hannah	843-442-6167	2009 Festival	PO Box 261	Charleston, SC 29407	32-0253853
East Cooper Community Outreach	Jack Little	843-849-9220	1145 Six Mile Road		Mt Pleasant, SC 29466	57-0939280
First Day Festival-City of Charleston	Jocelyn Edwards	843-965-4190	Mayor's Office for Children	50 Broad Street	Charleston, SC 29401	57-6000226
Footlight Players, Inc	Carmen Hanlon	843-722-7521	20 Queen street		Charleston, SC 29401	57-0357961
Keep North Charleston Beautiful	Kathleen Broughan	843-745-1076	1021 Aragon Street		N Charleston, SC 29405	57-1107432
Lowcountry Equine-Assisted Psychotherap	Laura Tregnor	843-881-9176	Light The Night	300 W Coleman Blvd Suite 206	Charleston, SC 29414	20-2158956
The Leukemia & Lymphoma Society	Jermaine Husser	843-747-8146	Chef's Feast and Gala	2864 Azalea Avenue	Mt Pleasant, SC 29484	13-6544916
Lowcountry Food Bank	Meredith Repik	843-571-1776	1064 Gardner Road	Suite 314	Charleston, SC 29405	57-0751835
March of Dimes	Amy Gordon	843-792-3321	C of C Dance Marathon	59 Bee Street	Charleston, SC 29407	13-1846366
MUSC Children's Hospital Fund	Marcia Shealey	843-670-0103	2152 Forest Lakes Blvd		Charleston, SC 29425	57-6028985
North Charleston Baseball	Trip DuBard	804-734-3451	234 West Cheves Street		Charleston, SC 29414	26-3407496
Palmetto Horizon	Camilla Herwig	864-414-6479	Technology	P O Box 25099	Florence, SC 29501	57-1036861
Palmetto Partners for Science and	Paul Timmons, Jr	843-817-2651	2043 Maybank Highway		Greenville, SC 29616	20-1756491
Portlight Strategies, Inc	Dan Conner	843-871-4044	120 N Magnolia Street		Charleston, SC 29412	58-2299951
Printing Associates	Stuart Foss	843-264-2200	7749 Pinehurst Street		Summerville, SC 29483	57-0670259
R B Sail High School	John Cawley	843-442-0959	P O Box 61720		N Charleston, SC 29420	57-6000322
Rotary Club of N Charleston	Chris Brooks	843-768-1720	PO Box 235		Awendaw, SC 29429	60-0011369
Rural Missions, Inc	Michael Beckman	843-767-4602	Charleston Chapter of SCSPE		N Charleston, SC 29418	57-0851113
SC Society of Professional Engineers	Donna Turbeville	803-255-2636	1201 Main Street	4016 Salt Pointe Pky Ste 200	Johns Island, SC 29457	57-0519864
South Carolina Business Week	Mary Gould	843-814-4451		Suite 1700	North Charleston, SC 29405	57-6028370
South of Broadway Theatre Company	Susie J Goss	843-856-3205		1080 E Montague Ave	Columbia, SC 29201	57-0901287
Special Olympics South Carolina	Susan Morris	843-567-2813	1053 Russellville Road		N Charleston, SC 29405	57-1036673
St Stephen Elem/Child Dev Class	Deborah Hanlon	843-225-9895	1401 Sam Rittenberg	Suite 3	Mt Pleasant, SC 29464	57-06860248
Teachers' Supply Closet	Jane Milner	843-571-7194	PO Box 81077		St Stephen, SC 29479	57-6000313
The Hemangiona Treatment Foundation	Patty Held	843-884-3494	1455 Wakeland Road	Suite 11	Charleston, SC 29407	45-0542815
Trident Academy	Eileen Chepenik	843-747-2223	5416-B Rivers Avenue		Charleston, SC 29416	56-2325247
Trident Literacy Association	Dennis Simon	843-760-3378	DDG 103 Commissioning		Mt Pleasant, SC 29464	57-0542727
USS Truston Commissioning Ceremony	Mary Crech	843-881-6393	P O Box 927	2326 South Lander Lane	N Charleston, SC 29406	57-0721308
Wando Band Boosters	Katie Freer	843-769-7395	Water Walk Sponsorship		Charleston, SC 29414	57-0728705
Water Missions International	James J Bailey	843-556-1909	PO Box 210		Mt Pleasant, SC 29465	57-1034207
Yescarolina	Gene Furchgott	843-577-4122	1031 Chuck Dawley Blvd	P O Box 31258	Charleston, SC 29417	57-1116978
Yo Art Project	Roslin J Fields	843-767-9969	3262 Landmark Drive	Suite 5	Charleston, SC 29402	20-3562766
Youth Empowerment Services (YES)					Mt Pleasant, SC 29485	57-0807801
					N Charleston, SC 29418	57-1092673
05.14.2010						73925

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Type or print File by the due date for filing your return. See instructions	Name of Exempt Organization		Employer identification number	
	The Intertech Group Foundation, Inc		20-1473099	
	Number, street, and room or suite no. If a P O box, see instructions			
	4838 Jenkins Avenue			
	City, town or post office, state, and ZIP code. For a foreign address, see instructions			
	N. Charleston		SC	29405

Check type of return to be filed (file a separate application for each return).

- | | | |
|---|--|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (sec 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

- The books are in the care of ► THE INTERTECH GROUP, INC 4838 JENKINS AVENUE NORTH CHARLESTO

Telephone No ► (843) 744-5174

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15/2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for.
- ☒ calendar year 2009 or
- ☐ tax year beginning _____, and ending _____

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3 a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	1,875
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	4,532
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions.	3c	\$	0

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions