

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



## Form 990-PF

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

OMB No 1545-0052

2009

Department of the Treasury Internal Revenue Service Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2009, or tax year beginning , 2009, and ending G Check all that apply: Initial return Initial Return of a former public charity Final return Amended return Address change Name change Employer identification number Use the IRS label. Bhutada Family Foundation 20-2051596 Otherwise, 4018 Westhollow Parkway R Telephone number (see the instructions) print Houston, TX 77082 281-582-8407 or type. See Specific If exemption application is pending, check here Instructions. D 1 Foreign organizations, check here. . . . . Check type of organization X Section 501(c)(3) exempt private foundation 2 Foreign organizations meeting the 85% test, check here and attach computation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation If private foundation status was terminated Fair market value of all assets at end of year Accounting method: X Cash J under section 507(b)(1)(A), check here. (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination under section 507(b)(1)(B), check here (Part I, column (d) must be on cash basis.) <u>2,156,170</u> Part I Analysis of Revenue and (a) Revenue and (b) Net investment (c) Adjusted net (d) Disbursements Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) expenses per books for charitable income ıncome purposes (cash basis only) (see the instructions).) Contributions, gifts, grants, etc, received (att sch) Ck ► X if the foundn is not req to att Sch B Interest on savings and temporary cash investments N/A Dividends and interest from securities 460 460 5a Gross rents . .. b Net rental income or (loss) -117,846 6a Net gain/(loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 663,723. Capital gain net income (from Part IV, line 2) . . Ô. 8 Net short-term\_capital-gain-9 Income modif@信息[JVE] 10 a Gross sales less returns and allowances SC b Less Cost of goods sold? NDV 1 9 2010 c Gross profit/(loss) (att sch) 11 Other ncome (attach schedule) ... See Statement 1,100 1,100 12 Total. Add lines 1 through 11 -116,286 560 13 Compensation of officers, directors, trustees, etc. 0. 14 Other employee salaries and wages . . 15 Pension plans, employee benefits 16a Legal fees (attach schedule) b Accounting fees (attach sch).. See St 2 2,200. 1,100 1.100 3,236. c Other prof fees (attach sch) See St .3 3,236 17 Interest . 18 Taxes (attach schedule)(see instr.) 19 Depreciation (attach sch) and depletion Occupancy 21 Travel, conferences, and meetings. 22 Printing and publications 23 Other expenses (attach schedule) See Statement 4 23,029 21,979 1,000. 24 Total operating and administrative expenses. Add lines 13 through 23 28,465 26,315 2,100. 25 Contributions, gifts, grants paid Part . XV. 124,751 124,751. Total expenses and disbursements. Add lines 24 and 25 153,216 26,315 126,851. Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements. -269,502b Net investment income (if negative, enter -0-). 0 C Adjusted net income (if negative, enter -0-)

| Part             | 11 1        | Balance Sheets Col.  | iched schedules and amounts in the description<br>imn should be for end-of-year amounts only.<br>e instructions ) | Beginning or year                       |                                       | or year               |
|------------------|-------------|--|---|---|---------------------------------------|-----------------------|
|                  |             |  |   | (a) Book Value                          | (b) Book Value                        | (c) Fair Market Value |
|                  |             | Cash — non-interest-bea                                    | * *   | 3,686.                                  | <del></del>                           |                       |
|                  | 2           | Savings and temporary                                      | cash investments  |   |                                       |                       |
|                  | 3           | Accounts receivable  | . •   |   |                                       |                       |
|                  |             | Less: allowance for dou                                    | btful accounts  |   |                                       |                       |
|                  | 4           | Pledges receivable .                                       | <b>-</b>  |   |                                       |                       |
|                  |             | Less: allowance for dou                                    | btful accounts ►  |   |                                       |                       |
|                  | 5           | Grants receivable  |   |   |                                       |                       |
|                  | 6           | Receivables due from officers,                             | directors, trustees, and other  |   |                                       | İ                     |
|                  |             | •  | chedule) (see the instructions)   |   |                                       |                       |
| ٨                | 7           | Other notes and loans receivab                             |   |   |                                       |                       |
| ŝ                |             | Less: allowance for dou                                    |   |   |                                       |                       |
| A<br>S<br>E<br>T | 8           | Inventories for sale or u                                  | h h   |   |                                       |                       |
| Ŧ                | 9           | Prepaid expenses and o                                     |   |   |                                       |                       |
| S                | 10:         | a Investments – U.S. and obligations (attach sche          | l state government<br>dule)   |   |                                       |                       |
|                  | ١           | b Investments — corporate stock                            | k (attach schedule) Statement5  | 790,728.                                | 809,446                               | . 809,446.            |
|                  | ١           | c Investments — corporate bond                             | ls (attach schedule)  |   |                                       |                       |
|                  | 11          | Investments – land, bui equipment basis                    | Ildings, and  |   | · · · · · · · · · · · · · · · · · · · |                       |
|                  |             | Less: accumulated depreciation (attach schedule)           | n •   |   |                                       |                       |
|                  | 12          | Investments - mortgage                                     | e loans   |   |                                       |                       |
|                  | 13          | Investments - other (at                                    | tach schedule) Statement .6   | 1,776,127.                              | 1,515,953                             | . 1,346,724.          |
|                  | 14          | Land, buildings, and equip                                 | pment basis. ►  |   |                                       |                       |
|                  |             | Less: accumulated depreciation<br>(attach schedule)        | n<br>▶  |   |                                       |                       |
|                  |             | Other assets (describe                                     |   |   |                                       |                       |
|                  | 16          | Total assets (to be com<br>see instructions. Also, s       | opleted by all filers — see page 1, item l)   | 2,570,541.                              | 2,325,399                             |                       |
| Ļ                | 17          | Accounts payable and a                                     | accrued expenses  |   | 24,360                                | .                     |
| I<br>A           | 18          | Grants payable   |   |   |                                       | _                     |
| Ŗ                | 19          | Deferred revenue   |   |   |                                       | _                     |
| L                | 20          | · · · · · · · · · · · · · · · · · · ·                      | trustees, & other disqualified persons  |   |                                       | _                     |
| I<br>T           | 21          | Mortgages and other notes pay                              | /able (attach schedule)   |   |                                       |                       |
| ı                | 22          | Other liabilities (describe                                | <b>-</b> )  |   | <u>_</u>                              |                       |
| E<br>S           | 23          | Total liabilities (add line                                | es 17 through 22)   | 0.                                      | 24,360                                |                       |
|                  |             | Foundations that follow                                    | v SFAS 117, check here hrough 26 and lines 30 and 31.   |   | 24,300                                |                       |
| N F              | 24          | Unrestricted.  | anough Eo and illies so dilu st.  |   |                                       |                       |
| ΕU               | 25          | Temporarily restricted                                     |   |   |                                       | -                     |
| T N              |             | Permanently restricted                                     | }   |   | ·                                     | ┥ 1                   |
|                  | 20          | •  | ot follow SFAS 117, check here.   |   |                                       | -                     |
| SBSA             |             | and complete lines 27 t                                    | ot follow SFAS 117, check here. 🕨 🗓<br>hrough 31.   |   |                                       | -                     |
| E L<br>T A       | 27          |  | • •   |   |                                       |                       |
| SNC              | 28          |  | and, building, and equipment fund .   |   |                                       |                       |
| OE               | 29          | • •  | ed income, endowment, or other funds  | 2,570,541.                              | 2,301,039                             |                       |
| R S              | 30          |  | d balances (see the instructions)   | 2,570,541.                              | 2,301,039                             | <u>.  </u>            |
|                  | 31          | Total liabilities and net (see the instructions)           | assets/fund balances  | 2,570,541.                              | 2,325,399                             |                       |
| Part             | 111         |  | s in Net Assets or Fund Balance   |   | 270207033                             | <u> </u>              |
|                  |             |  |   |   |                                       |                       |
| 1                | ota<br>end- | il net assets or fund balar<br>-of-year figure reported or | nces at beginning of year - Part II, colu   | mn (a), line 30 (must ac                |                                       | 2,570,541.            |
| 2                |             | er amount from Part I, line                                |   | • | . 2                                   |                       |
|                  |             | increases not included in line 2                           |   |   | 3                                     | <del></del>           |
|                  |             | lines 1, 2, and 3  |   |   | 4                                     | 2,301,039.            |
|                  |             | eases not included in line 2 (item                         | nize)   |   | 5                                     |                       |
| 6                | Tota        | I net assets or fund balar                                 | nces at end of year (line 4 minus line 5)   | - Part II, column (b), li               | ne 30 <b>6</b>                        | 2,301,039.            |

|   | the kind(s) of property sold (e.g., r   |  | (b) How acc |          | (C) Date acquired   | (d) Date sold      |
|---|---|--|-------------|----------|---|--------------------|
| 2-story brick warehouse; or common stock, 200 shares MLC Company)  P - Purchase D - Donation                  |   |  |             |          | (month, day, year)  | (month, day, year) |
| 1a Publicly-traded sec  | urities   |  | P           |          | Various   | Various            |
| b Passthrough K-1 Cap   |   |  | P           |          | Various   | Various            |
| С   |   |  |             |          |   |                    |
| d   |   | -  |             |          |   |                    |
| e   |   |  |             |          |   | <u> </u>           |
| (e) Gross sales price   | (f) Depreciation allowed<br>(or allowable)                                    | (g) Cost or other base plus expense of sa            |             |          | (h) Gain or<br>(e) plus (f) m                                   |                    |
| a 903,064.  |   | 78   | 1,569.      |          |   | 121,495.           |
| b -239,341.   |   | <del></del>  |             |          |   | -239,341.          |
| <u> </u>  |   | <del></del> -  |             |          |   |                    |
| <u>d</u>  |   | <del></del>  |             |          |   |                    |
| Complete only for assets show   | ng gain in column (h) and owned by  | the foundation on 12/31/60                           |             |          | <b></b>   |                    |
| (i) Fair Market Value<br>as of 12/31/69   | (j) Adjusted basis<br>as of 12/31/69  | (k) Excess of column<br>over column (j), if a        | (1)         | g<br>tha | (1) Gains (Coli<br>ain minus column (1<br>an -0-) or Losses (fr | (), but not less   |
| a   |   |  |             |          |   | 121,495.           |
| b   |   |  |             | _        |   | -239,341.          |
| С   |   |  |             |          | •   |                    |
| d   |   |  |             |          |   |                    |
| ее  |   |  |             |          |   |                    |
| 2 Capital gain net income or (net   | capital loss). — If gain, also If (loss), en                                  | enter in Part I, line 7<br>ter -0- in Part I, line 7 |             | 2        |   | -117,846.          |
| 3 Net short-term capital gain or (  | loss) as defined in sections 1222(5)  | and (6):   |             |          |   |                    |
| in Part I, line 8   | 8, column (c) (see the instructions   |  | -           | 3        |   | -117,846.          |
| (For optional use by domestic private   | Section 4940(e) for Reduce  |  |             |          | <u></u>   |                    |
| Was the foundation liable for the sec If 'Yes,' the foundation does not qual 1 Enter the appropriate amount i | tion 4942 tax on the distributable an   | mplete this part.                                    |             |          | Yes   | X No               |
| (a)  Base period years  Calendar year (or tax year beginning in)  | (b) Adjusted qualifying distributions   | <b>(c)</b><br>Net value of<br>noncharitable-use as   |             |          | (d)<br>Distribution<br>umn (b) divided                          |                    |
| 2008  | 526,282.  | 4,60   | 4,219.      |          |   | 0.114304           |
| 2007  | 598,995.  |  | 1,805.      |          |   | 0.112979           |
| 2006  | 358,373.  |  | 9,258.      |          |   | 0.267591           |
| 2005  | 52,246.   | 19   | 7,839.      |          |   | 0.264083           |
| 2004  |   |  |             |          |   |                    |
| 2 Total of line 1, column (d)   |   |  |             | 2        |   | 0.758957           |
| 3 Average distribution ratio for the number of years the foundation   | ne 5-year base period — divide the to<br>n has been in existence if less than | otal on line 2 by 5, or by the<br>5 years            |             | 3        |   | 0.189739           |
| 4 Enter the net value of nonchar  | table-use assets for 2009 from Part   | X. line 5.   |             | 4        |   | 2,074,889.         |
|   |   |  |             |          |   |                    |
| 5 Multiply line 4 by line 3   |   |  |             | 5        |   | 393,687.           |
| 6 Enter 1% of net investment inc  | come (1% of Part I, line 27b)   |  |             | 6        | 1   |                    |
| 7 Add lines 5 and 6   |   |  |             | 7        |   | 393,687.           |
| 8 Enter qualifying distributions fr   | om Part XII, line 4   |  |             | 8        |   | 126,851.           |
| If line 8 is equal to or greater to Part VI instructions.   | han line 7, check the box in Part VI,   | line 1b, and complete that                           | part using  | a 19     | 6 tax rate. See t   | he                 |

| <u>Par</u> | t VI.   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instruc  | tions)  |        |          |
|------------|--|---------|--------|----------|
| 1 a        | a Exempt operating foundations described in section 4940(d)(2), check here   and enter 'N/A' on line 1.  | S (S) 1 |        | 7        |
|            | Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)  |         |        |          |
| t          | b Domestic foundations that meet the section 4940(e) requirements in Part V,   |         | 0      | •        |
|            | check here and enter 1% of Part I, line 27b  |         |        | E.       |
| C          | c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b).   |         |        |          |
| 2          | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  | [65.2°] | 0      |          |
| 3          | Add lines 1 and 2  |         | 0      | <u>-</u> |
| 4          | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) . 4  | •       | 0      | <u>.</u> |
| 5          | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  |         | 0      | <u>.</u> |
| 6          | Credits/Payments:  |         |        |          |
| ā          | a 2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 2,000.  |         |        |          |
| ŀ          | b Exempt foreign organizations — tax withheld at source 6b   |         |        |          |
|            | c Tax paid with application for extension of time to file (Form 8868).   |         |        |          |
|            | d Backup withholding erroneously withheld  | 12.0    |        |          |
| 7          |  |         | 2,000  | ÷        |
| 8          | Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached   |         |        | _        |
| 9          | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  |         | 0      |          |
| 10         |  |         | 2,000  |          |
| 11         |  | -       | 0      | ÷        |
| Par        | t VII-A   Statements Regarding Activities  | (market | V I N. | _        |
| 1 a        | a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it<br>participate or intervene in any political campaign?  | 1 a     | Yes No | _        |
| ŀ          | 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      | L CAN    |
|            | If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  |         |        |          |
|            | c Did the foundation file Form 1120-POL for this year?   | 1c      | X      | _        |
| C          | d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:   |         |        |          |
|            | (1) On the foundation $\Rightarrow$ 0. (2) On foundation managers $\Rightarrow$ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on  |         |        |          |
|            | foundation managers • \$ 0 .   |         |        | ŧ        |
| 2          | Has the foundation engaged in any activities that have not previously been reported to the IRS?  | 2       | X      | ~33      |
|            | 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 of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes                           | 3       | X      |          |
| 4 8        | a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  | 4a      | Х      | _        |
| ŀ          | <b>b</b> If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?   | 4ь      | 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.  |         |        | 7        |
| 6          | ,  |         |        |          |
|            | By language in the governing instrument, or  |         |        |          |
|            | <ul> <li>By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict<br/>with the state law remain in the governing instrument?</li></ul>  | 6       | X      |          |
| 7          | Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV  | 7       | Х      | _        |
| 8 8        | a Enter the states to which the foundation reports or with which it is registered (see the instructions).  |         |        |          |
|            | TX   |         |        |          |
| ı          | 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   | 8 b     | Х      |          |
| 9          | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV | 9       | X      |          |
| 10         | Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names   | 10      | x      |          |

BAA

| orm <b>990-PF</b> (2009) Bhutada Family Foundation   | 20-205159      | 5     | Pa  | age <b>5</b> |
|--|----------------|-------|-----|--------------|
| Artivilia Statements Regarding Activities Continued  |                |       |     |              |
| 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            |
| Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  |                | 12    |     | Х            |
| Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address . ► N/A   | n application? | 13    | Х   |              |
|  | e no. ► 281-58 | 2-84  | 113 |              |
| Located at ► 4018 Westhollow Parkway Houston TX ZIP + 4 ►  |                | 2 _03 | =   |              |
| 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here   |                | N/A   |     | <u> </u>     |
| and enter the amount of tax-exempt interest received or accrued during the year  | 1 1            |       |     | N/A          |
| aন্থিয়া B Statements Regarding Activities for Which Form 4720 May Be Required   | 1 1            |       |     |              |
| 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 X No       |       |     |              |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a<br>disqualified person?  | Yes X No       |       |     |              |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?   | Yes X No       | l     |     |              |
| (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<br>Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instruction   | ons)?          | 1 b   | N   | /A           |
| Organizations relying on a current notice regarding disaster assistance check here   | ► 📋            |       |     |              |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts that were not corrected before the first day of the tax year beginning in 2009?   |                | 1 c   |     | 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   | 2(a)(2)        |       |     |              |
| (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see the instructions.)  | (a)(2) to      | 2Ь    | 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<br>20, 20, 20, 20   |                |       |     |              |
| <del></del>  |                |       |     |              |
| 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 approve 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.) | ed             |       |     |              |
| determine if the foundation had excess business holdings in 2009.)   |                | 3ь    | N   | /A           |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?   |                | 4a    |     | Х            |
| h Did the foundation make any investment in a pressure (but after December 21, 1000) that are the  |                |       |     |              |
| 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    |     | Х            |

Form **990-PF** (2009)

BAA

|   | •  |  |  |  |
|---|--|--|--|--|
| Form <b>990-PF</b> (2009) Bhutada Family Fou  |  |  | 20-205   | 51596 Page 6                                   |
| Part VII B Statements Regarding Activiti  |  | 1 4720 May Be Req                                | uired (continued)  |  |
| 5a During the year did the foundation pay or incur  | -  |  |  |  |
| (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 publ<br>on, directly or indirectly, any voter registra    | ic election (see section tion drive?                           | n 4955); or to carry                             | Yes X  | 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      | nan a charitable, etc, or<br>4940(d)(2)? (see instru           | rganization described uctions)                   | X Yes  | No   |
| (5) Provide for any purpose other than religious educational purposes, or for the prevention        | us, charitable, scientific<br>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 to described in Regulations section 53.4945 or in | the transactions fail to a current notice regard               | qualify under the exceptions disaster assistance | tions  |  |
| (see instructions)? Organizations relying on a current notice regains                               | <br>rding disaster assistanc                                   | ce check here                                    |  | 5b X   |
| c If the answer is 'Yes' to question 5a(4), does t  | _  |  |  | ' <b>                                     </b> |
| tax because it maintained expenditure respons   | sibility for the grant?  |  | Yes X  | No   |
| 6a Did the foundation, during the year, receive ar on a personal benefit contract?                  |  | (-)  | ਤ<br>ਹ   |  |
| b Did the foundation, during the year, pay premi  |  |  |  | No 6b X  |
| If 'Yes' to 6b, file Form 8870.   | ams, amount or manou   | ay, on a personal bene                           | m comidet.   |  |
| 7a At any time during the tax year, was the found   | lation a party to a prob                                       | ubited tax shelter transa                        | ction? Yes X   | No See See See See See See See See See Se      |
| <b>b</b> If yes, did the foundation receive any proceeds  |  |  |  | 7b N/A   |
| PartVIII Information About Officers, Di   |  |  |  |  |
| and Contractors   |  |  |  |  |
| 1 List all officers, directors, trustees, foundatio   |  | T  |  | T  |
| (a) Name and address  | (b) Title and average<br>hours per week<br>devoted to position | (c) Compensation<br>(If not paid, enter -0-)     | (d) Contributions to<br>employee benefit<br>plans and deferred<br>compensation | (e) Expense account, other allowances          |
| Ramesh Bhutada  | President  | 0.   | 0.   | 0  |
| 4018 Westhollow Parkway   | 1.00   |  |  |  |
| Houston, TX 77082   |  |  |  |  |
| Kiren Bhutada   | Vice Pres.   | 0.   | 0.   | 0  |
| 4018 Westhollow Parkway   | 1.00   | 1  |  |  |
| Houston, TX 77082   |  |  |  |  |
| Rishi Bhutada   | Secretary  | 0.   | 0.   | 0  |
| 4018 Westhollow Parkway   | 1.00   |  |  |  |
| Houston, TX 77082   | •  |  |  |  |
|   |  |  |  |  |
|   |  |  |  |  |
| 2 Compensation of five highest-paid employee  | es (other than those in  | cluded on line 1- see in                         | nstructions). If none. e   | nter 'NONE.'                                   |
| (a) Name and address of each employee   | (b) Title and average  | T'   | (d) Contributions to   | (e) Expense account,                           |
| paid more than \$50,000   | hours per week devoted to position                             |  | employee benefit plans and deferred compensation                               | other allowances                               |
| None  |  |  | •  |  |
|   |  |  |  |  |
|   |  |  |  |  |
|   |  |  |  |  |
|   |  |  |  |  |
|   |  |  |  |  |

| Form 990-PF (2009) Bhutada Family Foundation  | 20-205                           | 1596 Page <b>7</b>        |
|---|----------------------------------|---------------------------|
| Part VIII Information About Officers, Directors, Trustees, Founda and Contractors (continued)   | tion Managers, Highly Paid E     | mployees,                 |
| 3 Five highest-paid independent contractors for professional services — (see in enter 'NONE.'   | structions). If none,            |                           |
| (a) Name and address of each person paid more than \$50,000   | (b) Type of service              | (c) Compensation          |
| None  |                                  |                           |
|   |                                  |                           |
|   |                                  |                           |
|   |                                  |                           |
|   |                                  |                           |
| Total number of others receiving over \$50,000 for professional services .  |                                  | 0                         |
| Part IX-A Summary of Direct Charitable Activities   |                                  |                           |
|   |                                  |                           |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical in organizations and other beneficiaries served, conferences convened, research papers produced, etc. | nformation such as the number of | Expenses                  |
| 1 N/A   |                                  |                           |
|   |                                  |                           |
|   |                                  |                           |
| 2   |                                  |                           |
| 3   |                                  | <del></del>               |
|   |                                  |                           |
| 4   |                                  |                           |
|   |                                  |                           |
| Part IX-B Summary of Program-Related Investments (see Instruction   | ons)                             |                           |
| Describe the two largest program-related investments made by the foundation durin   | g the tax year on lines 1 and 2. | Amount                    |
| 1 <u>N/A</u>  |                                  |                           |
| 2   |                                  |                           |
| 2   |                                  |                           |
| All other program-related investments See instructions.   |                                  |                           |
|   |                                  |                           |
| Total. Add lines 1 through 3  | <b>&gt;</b>                      | 0.                        |
| BAA   |                                  | Form <b>990-PF</b> (2009) |

| Minimum Investment Return (All domestic foundations must complete this part. Fo see instructions.)   | reign fo | oundations,    |
|--|----------|----------------|
| 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  | 1 a      | 326,023.       |
| <b>b</b> Average of monthly cash balances  | 1 b      | 433,739.       |
| c Fair market value of all other assets (see instructions)   | 1 c      | 1,346,724.     |
| d Total (add lines 1a, b, and c)   | 1 d      | 2,106,486.     |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c  |          |                |
| (attach detailed explanation)  |          |                |
| 2 Acquisition indebtedness applicable to line 1 assets   | 2        | 0.             |
| <b>3</b> Subtract line 2 from line 1d  | 3        | 2,106,486.     |
| 4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3   |          |                |
| (for greater amount, see instructions)   | 4        | 31,597.        |
| 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4   | 5        | 2,074,889.     |
| 6 Minimum investment return. Enter 5% of line 5  | 6        | 103,744.       |
| Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operations and contain foreign arguments and contain foreign arguments.                       |          | undations      |
| and certain foreign organizations check here ► and do not complete this pa   |          | 100 511        |
| 1 Minimum investment return from Part X, line 6  | _1       | 103,744.       |
| 2a Tax on investment income for 2009 from Part VI, line 5  |          |                |
| b Income tax for 2009. (This does not include the tax from Part VI.)   |          |                |
| c Add lines 2a and 2b  | _2c      | 400 000        |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1  | 3        | 103,744.       |
| 4 Recoveries of amounts treated as qualifying distributions  | 4        |                |
| 5 Add lines 3 and 4  | 5        | 103,744.       |
| 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        | 103,744.       |
| RantXIII Qualifying Distributions (see instructions)   |          |                |
| 1 Amounts paid (including administrative expenses) to accomplish charitable, etc. purposes:  |          | · <del>·</del> |
| 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      | 126,851.       |
| <b>b</b> Program-related investments — total from Part IX-B  | 1 Ь      |                |
| 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>b</b> Cash distribution test (attach the required schedule)   | 3ь       |                |
| 4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 .   | 4        | 126,851.       |
| 5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).                      | 5        |                |
| 6 Adjusted qualifying distributions. Subtract line 5 from line 4   | 6        | 126,851.       |
| - respected quantiting and an end of contract and of north line 4  |          | 120,001.       |

lote: 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.

BAA

### Part XIII Undistributed Income (see instructions)

|   | (a)<br>Corpus | <b>(b)</b><br>Years prior to 2008 | <b>(c)</b><br>2008 | <b>(d)</b><br>2009 |
|---|---------------|-----------------------------------|--------------------|--------------------|
| 1 Distributable amount for 2009 from Part XI, line 7  |               |                                   |                    | 102 744            |
| 2 Undistributed income, if any, as of the end of 2009:  |               |                                   |                    | 103,744.           |
| a Enter amount for 2008 only  |               |                                   | 0.                 |                    |
| <b>b</b> Total for prior years: 20 , 20 , 20  |               | 0.                                |                    |                    |
| 3 Excess distributions carryover, if any, to 2009:  |               |                                   |                    |                    |
| a From 2004 .   |               |                                   |                    |                    |
| <b>b</b> From 2005 42,426.  | ]             |                                   |                    |                    |
| c From 2006 291, 460.   | ]             |                                   |                    |                    |
| <b>d</b> From 2007 347, 013.  | ]             |                                   |                    |                    |
| e From 2008 296, 071.   |               |                                   |                    |                    |
| f Total of lines 3a through e   | 976,970.      |                                   |                    |                    |
| 4 Qualifying distributions for 2009 from Part   |               |                                   |                    |                    |
| XII, line 4: ► \$126,851.   |               |                                   | <del></del>        |                    |
| a Applied to 2008, but not more than line 2a  |               |                                   | 0.                 |                    |
| <ul> <li>Applied to undistributed income of prior years<br/>(Election required — see instructions)</li> </ul> |               | 0.                                |                    |                    |
| c Treated as distributions out of corpus  |               |                                   |                    |                    |
| (Election required - see instructions)  | 0.            |                                   |                    |                    |
| <b>d</b> Applied to 2009 distributable amount .   |               |                                   |                    | 103,744.           |
| e Remaining amount distributed out of corpus  | 23,107.       |                                   |                    |                    |
| 5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the                     | 0.            |                                   |                    | <u> </u>           |
| same amount must be shown in column (a).)   |               |                                   | Ì                  |                    |
| ,,,   |               |                                   |                    |                    |
| 6 Enter the net total of each column as   |               |                                   |                    |                    |
| indicated below:  | 1,000,077.    |                                   |                    |                    |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5   | 1,000,077.    |                                   |                    |                    |
| <b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b                                     |               | 0.                                |                    |                    |
| c Enter the amount of prior years' undistribut-   |               |                                   |                    |                    |
| ed income for which a notice of deficiency has been issued, or on which the section                           |               |                                   |                    |                    |
| 4942(a) tax has been previously assessed  |               | 0.                                |                    |                    |
| d Subtract line 6c from line 6b Taxable   |               |                                   |                    |                    |
| amount – see instructions   |               | 0.                                |                    |                    |
| e Undistributed income for 2008. Subtract line 4a from  |               |                                   | _                  |                    |
| line 2a. Taxable amount — see 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.<br>Subtract lines 7 and 8 from line 6a                              | 1,000,077.    |                                   |                    |                    |
| 10 Analysis of line 9:  |               |                                   |                    |                    |
| a Excess from 2005 42,426.  |               |                                   |                    |                    |
| <b>b</b> Excess from 2006 291, 460.   |               |                                   |                    |                    |
| <b>c</b> Excess from 2007 347, 013.   |               |                                   |                    |                    |
| <b>d</b> Excess from 2008. 296, 071.  | ]             |                                   |                    |                    |
| e Excess from 2009 . 23,107.  | <u> </u>      |                                   |                    |                    |
| 24.4  |               |                                   |                    | Corm 000 DE (2000) |

| Form 990-PF (2009) Bhutada Family Fo   |                       |  |   | 20-2051596                                    | Page <b>10</b>                   |
|--|-----------------------|--|---|---|----------------------------------|
| Partix Private Operating Foundation  |                       |  |   |   | <u> </u>                         |
| 1 a If the foundation has received a ruling or o<br>is effective for 2009, enter the date of the   | ruling                |  |   | . <u></u> •                                   |                                  |
| <b>b</b> Check box to indicate whether the foundat   | ion is a private op   | erating foundation of                      |   | 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>(b)</b> 2008                            | (c) 2007  | (d) 2006                                      | (e) Total                        |
| <b>b</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<br>for active conduct of exempt activities.<br>Subtract line 2d from line 2c  |                       |  |   |   |                                  |
| 3 Complete 3a, b, or c for the<br>alternative test relied upon:  |                       |  |   |   |                                  |
| a 'Assets' alternative test — enter:   |                       |  |   | 1   |                                  |
| (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()(3)(B)(III).   | ·                     |  |   |   |                                  |
| (3) Largest amount of support from an exempt organization  |                       |  |   |   |                                  |
| (4) Gross investment income  |                       |  |   |   |                                  |
| Supplementary Information assets at any time during th   | (Complete this        | part only if the                           | organization h                                    | ad \$5,000 or moi                             | e in                             |
| 1 Information Regarding Foundation Manag   | jers:                 | <u> </u>                                   | · <del>· · · · · · · · · · · · · · · · · · </del> |   |                                  |
| a List any managers of the foundation who have<br>close of any tax year (but only if they have<br>See Statement 7  | nave contributed more | nore than 2% of the<br>than \$5,000). (See | total contributions section 507(d)(2).)           | received by the found                         | dation before the                |
| <b>b</b> List any managers of the foundation who co  | own 10% or more       | of the stock of a cor                      | poration (or an equ                               | ally large portion of                         | the ownership of                 |
| a partnership or other entity) of which the None   | foundation has a      | 10% or greater inter                       | est.  | any large pertien er                          |                                  |
| 2 Information Regarding Contribution, Gran<br>Check here ► X if the foundation only n<br>requests for funds. If the foundation make<br>complete items 2a, b, c, and d. | nakes contribution    | s to preselected cha                       | arıtable organization                             | ns and does not acce<br>ganizations under oth | pt unsolicited<br>er conditions, |
| a The name, address, and telephone number  | r of the person to    | whom applications                          | should be addresse                                | ed:   |                                  |
|  |                       |  |   |   |                                  |
|  |                       |  |   |   |                                  |
| <b>b</b> The form in which applications should be s  | submitted and info    | rmation and materia                        | als they should incli                             | ude:  |                                  |
| c Any submission deadlines:  |                       |  |   |   |                                  |
| d Any restrictions or limitations on awards, s   | such as by geogra     | phical areas, charita                      | able fields, kinds of                             | institutions, or other                        | factors:                         |
|  |                       |  |   |   |                                  |
|  |                       |  |   |   |                                  |

3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Foundation Recipient Purpose of grant or contribution status of recipient **Amount** Name and address (home or business) a Paid during the year Public |See attachment See attachment N/A 124,751. 124,751. Total **b** Approved for future payment **Total** 

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

| nter gros  | s amounts unless otherwise indicated   | Unrelat                                 | ed business income          | Excluded                      | l by section 512, 513, or 514   |  |
|--|--|---|-----------------------------|-------------------------------|---|--|
|  | ram service revenue:   | (a)<br>Business<br>code                 | (b)<br>Amount               | (c)<br>Exclu-<br>sion<br>code | (d)<br>Amount   | (e) Related or exempt function income (see the instructions) |
| •  | Tall Service revenue.  |   |                             | coue                          |   | (see the instructions)                                       |
| . —  |  | 1                                       |                             |                               |   |  |
|  |  | 1                                       |                             |                               |   |  |
|  |  |   |                             |                               |   |  |
|  |  |   |                             |                               |   |  |
| f  |  | ļ                                       |                             |                               |   |  |
|  | and contracts from government agencies   |   |                             |                               |   |  |
|  | bership dues and assessments   |   |                             |                               |   |  |
|  | st on savings and temporary cash investments<br>ends and interest from securities  |   |                             | 14                            | 460.  |  |
|  | ental income or (loss) from real estate:   | •                                       | <b>企业是国际企业的企业</b>           |                               | ADU.  | · · · · · · · · · · · · · · · · · · ·                        |
|  | -financed property   |   | of alternationals, Not alim | \$                            | Table to The Control of the Control | The same of the same of                                      |
|  | debt-financed property   |   |                             |                               |   | <u> </u>   |
|  | ntal income or (loss) from personal property   |   |                             |                               |   | <u> </u>   |
|  | r investment income  |   |                             |                               | <u> </u>  |  |
|  | or (loss) from sales of assets other than inventory  |   |                             | 18                            | -117,846.   |  |
|  | ncome or (loss) from special events  |   |                             |                               | 22.70.000   |  |
|  | s profit or (loss) from sales of inventory   |   |                             |                               |   |  |
|  | r revenue:   | 1 1 1 1 1 1                             | <b>公共的</b>                  | V Sales                       | (1) 不测器机性测量   | 機能はいかいかい   |
| a K-1  | Income   |   |                             | 14                            | 1,100.  |  |
| b  |  |   |                             |                               | _   |  |
|  |  |   |                             |                               |   |  |
| d  |  | ļ                                       |                             |                               |   |  |
| е  |  | ŀ                                       |                             |                               |   |  |
|  |  |   | <del> </del>                |                               |   |  |
|  | otal. Add columns (b), (d), and (e)  | . " " " " " " " " " " " " " " " " " " " |                             | 32.                           | -116,286.   |  |
| 13 Total   | I. Add line 12, columns (b), (d), and (e)  | <del></del>                             |                             | 32 g Mar                      | -116,286.<br>1 <b>3</b>   |  |
| 13 Total<br>See works                              | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c                                      | alculations.)                           |                             |                               | 13  |  |
| 13 Total<br>See works                              | I. Add line 12, columns (b), (d), and (e)  | alculations.)                           |                             |                               | 13  |  |
| 13 Total<br>See works                              | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c                                      | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.      | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.<br>▼ | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |
| 13 Total<br>See works<br>Part XVI<br>Line No.      | I. Add line 12, columns (b), (d), and (e) sheet in the instructions for line 13 to verify c  B Relationship of Activities to the | e Accompl                               | lishment of Exemp           | t Purpe                       | 13<br>oses  | -116,286   |

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations Part XVII 1 Did the organization directly or indirectly engage in any of the following with any other organization

| relatii                     | ng to political organizati  | n trie Code (or<br>ions?                         | mer than section :   | our(c)(3) organ                                       | izations) o                            | or in section 5   | 21,  |   |                          |
|-----------------------------|---|--|--|---|--|---|--|---|--------------------------|
|                             | sfers from the reporting  |  | a noncharitable e  | xempt organiza  | ition of:                              |   |  |   |                          |
| <b>(1)</b> C                |   |  |  |   |  |   |  | . 1a (1)  | Х                        |
| <b>(2)</b> C                | Other assets  |  |  |   |  |   |  | 1a (2)  | X                        |
| <b>b</b> Other              | r transactions.   |  |  |   |  |   |  |   |                          |
| (1) S                       | sales of assets to a none   | charitable exe                                   | mpt organization   |   |  |   |  | . 1b(1)   | Х                        |
|                             | urchases of assets from   |  | -  |   |  |   |  | 1b(2)   | X                        |
| • • •                       | Rental of facilities, equip   |  |  |   |  |   |  | 1 b (3)   | X                        |
|                             | Reimbursement arranger  |  |  |   |  |   |  | 1b (4)  | X                        |
| • •                         | oans or loan guarantees   |  |  |   |  |   |  | 1 1 (5)   | X                        |
|                             | erformance of services  |  | or fundraising s   |   |  |   |  | 1b (6)  | X                        |
| ٠,                          | ng of facilities, equipme   |  |  |   |  |   |  | 1c  | X                        |
| <b>d</b> If the the gany to | answer to any of the al<br>oods, other assets, or s<br>ransaction or sharing ar | bove is 'Yes,'<br>ervices given<br>rangement, sl | complete the follo<br>by the reporting for<br>now in column <b>(d)</b> | wing schedule.<br>oundation. If th<br>the value of th | Column (<br>e foundation<br>e goods, c | b) should always<br>on received lead<br>other assets, o | ays show the far<br>ess than fair mar<br>or services recei | r market valu<br>ket value in<br>ved.           | e of                     |
| (a) Line no.                | (b) Amount involved   | (c) Name o                                       | f noncharitable exempt   | torganization   | <b>(d)</b> De                          | escription of trans                                     | fers, transactions, a                                      | nd sharing arrang                               | gements                  |
| N/A                         |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  | ·   |  |   |  |   |                          |
|                             |   |  | **   |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   | -                                      |   |  | ·   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  | •   |                          |
|                             |   |  |  | -   |  |   |  |   |                          |
| descr                       | e foundation directly or i  | of the Code (or                                  | ated with, or relate<br>ther than section !                            | ed to, one or m<br>501(c)(3)) or in                   | ore tax-ex<br>section 52               | tempt organiz<br>27? .                                  | ations   | . Yes   | Χ̈́Nο                    |
|                             | (a) Name of organization  |  | <b>(b)</b> Type (  | of organization                                       |  | (c)   | Description of r   | elationship                                     |                          |
| N/A                         |   |  | ,=,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,                                |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  | •   | <del></del>              |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  |   |  |   |                          |
|                             |   |  |  |   |  | <del>-                                    </del>        |  |   |                          |
| Under pen-<br>complete      | alties of perjury, I declare that I<br>Declaration of preparer (other the       | have examined the                                | us return, including acco<br>uciary) is based on all ii                | mpanying schedules<br>nformation of which             | preparer has                           | any knowledge.  | st of my knowledge ar                                      |   | , correct, and           |
| Sign                        | ature of officer or trustee   |  |  |   | Date                                   |   | Title  |   |                          |
| Paid<br>Pre-                | Preparer's signature  | MO   | ant  | CPA   | Date                                   | 10.10   | Check if (S  | reparer's Identifyi<br>iee Signature in t<br>/A | ng number<br>the instrs) |
| parer's                     |   | ek & Vett  |  |   |  |   | EIN N/A  |   |                          |
| Use                         | yours if self-<br>employed), > 2900   | Weslayan   | , Suite 200  |   |  |   |  |   |                          |

address, and ZIP code Houston, TX 77027-5132 (713) 439-5739

BAA

| 2009  | Federal Statements  | Page '                                       |
|---|---|--|
|   | Bhutada Family Foundation   | 20-205159                                    |
| Statement 1<br>Form 990-PF, Part I, Line 11<br>Other Income             |   |  |
| ¥€  | (a) (b) Net<br>Revenue Investment<br>per Books Income   | (c)<br>Adjusted<br>Net Income                |
|   | Total \$\frac{\\$}{2} \frac{1,100.\\$}{1,100.\\$} \frac{1,100.}{1,100.\\$}  | \$ 0.  |
| Statement 2<br>Form 990-PF, Part I, Line 16b<br>Accounting Fees         |   |  |
| Tax return prep and complian  | (a) (b) Net (c)  Expenses Investment Adjusted  per Books Income Net Income  ce \$ 2,200. \$ 1,100.  Total \$ 2,200. \$ 1,100. | (d) Charitable Purposes  \$ 1,100. \$ 1,100. |
| Statement 3<br>Form 990-PF, Part I, Line 16c<br>Other Professional Fees |   |  |
| Investment management fees  | (a) (b) Net (c)  Expenses per Books Investment Adjusted Net Income  \$ 3,236. \$ 3,236.  Total \$ 3,236. \$ 3,236.            | (d) Charitable Purposes  \$ 0.               |
| Statement 4 Form 990-PF, Part I, Line 23 Other Expenses                 |   |  |
|   | (a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income  |  |

46. \$ 1,000.

21,933. 50.

Total \$

46.

21,933.

1,000.

1,000.

\$

Bank fees ... Educational seminar.

Other expenses

| 2009  | Federal Statements         |                      | Page 2               |
|---|----------------------------|----------------------|----------------------|
|   | Bhutada Family Foundation  |                      | 20-2051596           |
| Statement 5<br>Form 990-PF, Part II, Line 10b<br>Investments - Corporate Stocks |                            |                      |                      |
| Corporate Stocks  | Valuation<br>Method        | Book<br>Value        | Fair Market<br>Value |
| Money Market Fund   | Cost \$ Total \$           | 809,446.<br>809,446. |                      |
| Statement 6<br>Form 990-PF, Part II, Line 13<br>Investments - Other             |                            |                      |                      |
| Other Investments   | Valuation<br><u>Method</u> | Book<br>Value        | Fair Market<br>Value |
| Monsoon Fund  | Cost \$                    | 1,515,953.           | \$ 1,346,724.        |
|   | Total <u>\$</u>            | 1,515,953.           | \$ 1,346,724.        |
| Statement 7   |                            |                      |                      |

Statement 7
Form 990-PF, Part XV, Line 1a
Foundation Managers - 2% or More Contributors

Ramesh Bhutada Rishi Bhutada

# Bhutada Family Foundation 2009. Form 990-PF

#### Part XV, Line 3a - Grants and Contributions paid during the year

|  | Public Charity |           | Paid             |           |
|--|----------------|-----------|------------------|-----------|
| Name and Address   | Relationship   | Status    | Purpose          | Amount    |
| Bellaire High School<br>PO Box 1374, Bellaire, TX 77402                                | N/A            | 509(a)(1) | General Donation |           |
| CA Parents for the Equalization of Edu. Materials P.O.Box 280442, Northridge, CA 91328 | N/A            | 509(a)(1) | General Donation | 3,000     |
| Delta Sigma Pi<br>PO Box 71301, Houston, TX 77071                                      | N/A            | 501(c)(7) | General Donation | 250       |
| Hindu American Foundation<br>P.O. Box 48528 ,Tampa, Florida 33647                      | N/A            | 509(a)(2) | General Donation | 25,000    |
| Karya Siddhi Hanuman Temple Ramakrishna<br>12030 Independence, Frisco, TX 75035        | N/A            | Church    | General Donation | 400       |
| Lone Star Boxer Rescue<br>P.O. Box 541286, Houston, TX 77254                           | N/A            | 509(a)(1) | General Donation | 250       |
| Mahatma Gandhi Library<br>3300 S.Gessner Rd Ste. 249 Houston, TX 77063                 | N/A            | 509(a)(1) | General Donation | 500       |
| PYP Yog Foundation<br>323 W. Alkire Lake Dr., Sugar Land, TX 77058                     | N/A            | 509(a)(1) | General Donation | 25,000    |
| Radha Krishna Temple<br>11625 Beechnut, Houston, TX 77072                              | N/A            | Church    | General Donation | 5,100     |
| Samskrita Bharati<br>1044 Lancer Drive, San Jose, CA 95130                             | N/A            | 509(a)(2) | General Donation | 1,000     |
| Sewa International<br>5318 Medlock Corners Dr., Norcross, GA 30092                     | N/A            | 509(a)(2) | Seva Project     | 36,500    |
| The Ex-Student Assn<br>P.O. Box 7278, Austin, TX 78713                                 | N/A            | 509(a)(2) | General Donation | 250       |
| Vedic Friends Assn.<br>P.O.Box 15082, Detroit, MI 48215                                | N/A            | 509(a)(1) | General Donation | 6,000     |
|  |                |           | T-4-1            | ¢ 104 751 |

Total \$124,751