

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**

Department of the Treasury

Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

Use the IRIS Name of foundation Andrews Change A Employer Identification number	Use the IRS Name of foundation included return	For ca	lendar	year 2009, or tax year beginning			, and e	nding		
Use the IRS Name of foundation A Employer Identification number 20 - 28 98 46 2	Use the IRS	G Che	eck all t	that apply: Initial return		Initial return of a fo	ormer public	charity	Final retur	n
The Part of the Pa	THE ANDERSEN PAMILY POUNDATION, INC. 20-2898462			Amended return		Address chan	ge		Name change	
THE ANDERSEN FAMILY FOUNDATION, INC. 20-2898462 Telephone number of control in rot devices to breet address) Recent of the control in rot devices to breet address) Recent of the control in rot devices to breet address) Recent of the control in rot devices to breet address) Recent of the control in rot	THE ANDERSEN FAMILY FOUNDATION, INC.	llea ti	a IRC	Name of foundation					A Employer identificatio	n number
Otherwise, THE ANDERSEN FAMILY FOUNDATION, INC. 20-289462	Chebrewise, THE ANDERSEN FAMILY FOUNDATION, INC. pirit Increase and section of the control and sec									
Set Specific Contributions	of type: A 56 SMITHITORIN ROAD 952/470-6405			THE ANDERSEN FAMILY	FOUN	DATION, I	NC.		20-2898462	2
See Specific City or town, state, and ZiP code EXCELSTOR MN 55331 - 8211	See Specific Clay or Towns, state, and 2iP code instructions EXCELSTOR MIN 55331—8211 If Check type of organization: XI section 501(e)(3) exempt private foundation Section 497(3/1) nonesempt charitable trust Other taxable private foundation Far marker trust of all assets at end of year Accounting method: Cash XI Account through continued and of year Accounting method: Team arker trust of all assets at end of year Accounting method: Team arker trusts of all assets at end of year Accounting method: Team arker trusts of all assets at end of year Accounting method: Team arker trusts of all assets at end of year Accounting method: Team arker trusts of all assets at end of year Accounting method: Team arker trusts of all assets at end of year Accounting method: Team arker trusts of all assets at end of year Accounting method: Team arker trusts of all assets at each of year Accounting method: Team arker trusts of all assets at each of year Accounting method: Team arker trusts of all assets at each of year Accounting method: Team arker trusts of all assets and an arker trusts of a consider a column of year Accounting method: Team arker trusts of a consider a column of year Accounting method: Team arker trusts of a consider and interest from securities Accounting method: Team arker trusts of a consider and interest from securities Accounting method: Team arker trusts of a consider and interest from securities Accounting method: Team arker trusts Accounting method: Team arker tru	pr	int	Number and street (or P O box number if mail is no	t delivered t	o street address)		Room/suite	B Telephone number	
Instructions Doty to them; such and an order of the process Dot to t	Instructions Cardy to first, subtraction to Control Co			6456 SMITHTOWN ROAD					952/470-64	105
				City or town, state, and ZIP code					C If exemption application is	pending, check here
Section 4947(a)(1) nonexempt chardable trust	Section 49/1/(a)(1) nonexempt charable brust □ Other topologic private foundation of the responsibility of the section 30/1/(b)(1)(a), check here □ (from Part It, col. C), line 16) □ (part I, col. C), line 16) □ (part I) (part I, col. C), line 16) □ (part I) (part I, col. C), line 16) □ (part I) (part I, col. C), line 16) □ (part I) (part I, col. C), line 16) □ (part I) (part I, col. C), line 16) □ (part I) (part I, col. C), line 16) □ (part I) (pa	mstruc	cuons.	EXCELSIOR, MN 5533	-821	1			D 1. Foreign organization	s, check here
Far market value of all assets a end of year	Fair market value of all assets at end of year	H Che	ck type	e of organization: X Section 501(c)(3) exempt p	rivate foundation			Foreign organizations m check here and attach c	eeting the 85% test, omputation
Far market value of all assets at end of year J Accounting method: Cash XJ Accounts Fortier of Part I Other (specify) Other (specify) Other (specify) Fart I J 80.7 , 54.1 Section 507(b)(1)(8), check here Departs	Far market value of all assets at end of year Accounting method:		Section	n 4947(a)(1) nonexempt charitable trust	Other t	axable private founda	ation		F If private foundation st	atus was terminated
S S Contributions Cont	Name	l Fair	market	t value of all assets at end of year 🕽 Acco	inting met	hod: 🔲 Cash	X Acc	rual		
Part Analysis of Revenue and Expenses (a) Revenue and expenses per books (b) Net mestment (c) Adjusted net mestments (d) poleuramentus (d) poleurame	Part II Analysis of Revenue and Expenses (s) Revenue and contents or chinemators (s) (s) and (s) many not recessory regalat the amounts in column (s)) (s)	(fror	n Part	II, col. (c), line 16)					F If the foundation is in a	60-month termination
The total of amounts in columns (b), (c), and (d) may not income	The state of amounts in columns &	\$			olumn (d)	must be on cash l	basis)		under section 507(b)(1)(B), check here
1 Contributions, gifts, grants, etc., received 52,365. N/A	1 Contributions, gitts, grants, tell, received 52,365. N/A	Parl	ᅜ	nalysis of Revenue and Expenses						(d) Disbursements
2 Check	2 Check		nec	cessarily equal the amounts in column (a))	ex		inc	ome		
Interest on savings and temporary	Interest on savings and temporary		1 Con	ntributions, gifts, grants, etc., received		52,365.			N/A	
Combined and interest from securities 31,514. 31,514. STATEMENT 1	Page 2 Comparison of Officers, directors, hustees, etc.				L		·			
Sa Gross rents Description of the control of th	\$ Gross rents between crocos of the control of the		3 Inter	rest on savings and temporary h investments						
Description	D Net rental income or (loss) A Net game of (loss) Contributions of the state of the s		4 Divi	idends and interest from securities		31,514.	3	1,514.		STATEMENT 1
Section Company Comp	64 Net gain or (loca) from sale of assets not on line 10 687 / 185 .		5a Gro	oss rents 🛒 🔝 🚬 📜						<u> </u>
Description	D Gross sales price for all 687, 185 0 0 0 0 0 0 0 0 0	}	b Net	rental income or (loss)						<u> </u>
Net short-term capital gain Short-term c	8 Net short-retrr capital gain 9 Income modifications 10a and divavances b Leas Cest of goods sold c Gross pade leas returns 10 Leas Cest of goods sold c Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11	6)	<u>-156,610.</u>			PEC	ENED
Net short-term capital gain Short-term c	8 Net short-retrr capital gain 9 Income modifications 10a and divavances b Leas Cest of goods sold c Gross pade leas returns 10 Leas Cest of goods sold c Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11		b Gros	ss sales price for all 687, 185						
Net short-term capital gain Short-term c	8 Net short-retrr capital gain 9 Income modifications 10a and divavances b Leas Cest of goods sold c Gross pade leas returns 10 Leas Cest of goods sold c Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11	e l	7 Cap	ital gain net income (from Part IV, line 2)						
10a and lowaness Dess Cost of goods sold C Gross profit or (loss) C	10a and allowances	œ	8 Net	short-term capital gain	. L				I I MAY	T
Description	Display Disp									
b Less Cost of goods sold c Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11	b Less Cost of goods sold c Gross profit or (loss) 11 Other moome 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, business, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 135. 0. 136. 0. 137. 1 Interest 18 Taxes STMT 5 11,833. 11,833. 0. 0. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses STMT 7 25. 0. 24 Total operating and administrative expenses. Add lines 13 through 23 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0) c Adjusted net income (if negative, enter -0)	11							OGE	JEN. UT
11 Other Income 7,967. 7,967. STATEMENT 2	11 Other income 7,967. 7,967. STATEMENT 2		b Less	s Cost of goods sold						
12 Total Add lines 1 through 11 -64,764. 39,481.	12 Total Add lines 1 through 11 -64,764. 39,481.		c Gro	ess profit or (loss)	-				 	<u> </u>
13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 1.35 . 0 . 1.35 . 0 . 1.35 . 0 . 1.35 . 0	13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 1.35 0 1.35 16a Legal fees STMT 4 2,366 0 0 2,366 17 Interest 18 Taxes STMT 5 11,833 11,833 0 18 Taxes STMT 6 450 450 450 0 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Travel, conferences, and meetings 23 Other expenses STMT 7 25 0 0 25 Total operating and administrative Expenses Add lines 13 through 23 14,809 12,283 2,526 26 Contributions, gifts, grants paid 72,600 72,600 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) C Adj	1	1 Oth	er income	 				ļ	STATEMENT 2
14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees	14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 3 135. 0. 135. b Accounting fees STMT 4 2,366. 0. 2,366. c Other professional fees STMT 5 11,833. 11,833. 0. 17 Interest 18 Taxes STMT 6 450. 450. 0. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses STMT 7 25. 0. 255. 24 Total operating and administrative expenses. Add lines 13 through 23 14,809. 12,283. 2,526. 25 Contributions, gifts, grants paid 72,600. 72,600. 26 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-)		2 Tot	al. Add lines 1 through 11			3		ļ	
15 Pension plans, employee benefits 16a Legal fees STMT 3 1.35 0 0 1.35 0 0 0 0 0 0 0 0 0	15 Pension plans, employee benefits 16a Legal fees STMT 3 1.35 .			•	.	0.		0.		0.
16a Legal fees STMT 3 135. 0. 135. b Accounting fees STMT 4 2,366. 0. 2,366. c Other professional fees STMT 5 11,833. 11,833. 17 Interest 18 Taxes STMT 6 450. 450. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses STMT 7 25. 0. 25 Total operating and administrative expenses. Add lines 13 through 23 14,809. 12,283. 2,526. 26 Total expenses and disbursements Add lines 24 and 25 87,409. 12,283. 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27,198.	16a Legal fees	1 -			 					
Accounting lees STMT 5 11,833 11,833 0 0	Accounting lees STMT 4 2,300 0 0 0 0 0 0 0 0 0	ال _د			ļ	425			<u> </u>	125
Accounting lees STMT 5 11,833 11,833 0	Accounting lees STMT 4 2,300 0 0 0 0 0 0 0 0 0	8 1	-		 				<u> </u>	
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	be			·	2,366.				
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	ω̈́		• • • • • •	 	11,833.		1,833.	 	<u> </u>
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	≨ 1			·	450		450	 	
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A				 	450.		450.	 	<u> </u>
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	: <u>E</u>							 	
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	E 2			ļ					
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	8 2			}				ļ	
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	[B			} -	25				75
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 28 Total expenses and disbursements 48 7, 409. 12, 283. 75, 126.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	E 2		, , , , , , , , , , , , , , , , , , , ,		43.				43.
25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 , 198.	25 Contributions, girs, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	a a			- 1	14 000	1	2 202	Í	2 526
26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27 Total expenses and disbursements 87,409. 12,283. 75,126.	26 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	, å		_	·	72 600		4,403.	 	72 600
a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27,198.	a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A				 	14,000.				12,000.
a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27,198.	a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	a 2		•	1	97 400	1	ງງວາ		75 126
a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) 27,198.	a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A	3 1			- 	0/,409.		4,403.		13,120.
b Net investment income (if negative, enter -0-)	b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A) 2						,		-
	C Adjusted net income (if negative, enter -0-)	- }			- }	-104,110.	<u>_</u>	7 100	 	
C Adjusted not income Grandon and C \				•	<u> </u>		4	1,130.	NT / D	
Porm 990-PF (2009)	92300 LHA For Privacy Act and Pananyork Reduction Act Nation and the instructions	923501			on Act No	ting ear the instruct			M/A	Form 990-PF (2000)

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	year
Part II Balance Sileets column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 Cash - non-interest-bearing	53,702.	71,637.	71,637.
2 Savings and temporary cash investments			
3 Accounts receivable ►			
Less: allowance for doubtful accounts	7		
4 Pledges receivable ▶	1		···
Less: allowance for doubtful accounts	i i		
C Oronto reconsoble			
6 Receivables due from officers, directors, trustees, and other			
	1		
disqualified persons	<u> </u>		
· ————————————————————————————————————	-	ł	-
Less: allowance for doubtful accounts ▶	 		
9 Prepaid expenses and deferred charges			
	 		
10a Investments - U.S. and state government obligations	062 266	1 150 240	1 150 040
b Investments - corporate stock STMT 8	963,366.	1,158,249.	1,158,249.
c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis	-	,	. ,
Less accumulated depreciation	 		
12 Investments - mortgage loans			
13 Investments - other STMT 9	483,603.	577,655.	577,655.
14 Land, buildings, and equipment basis	_ .		
Less accumulated depreciation		 	
15 Other assets (describe ►)			
	1		
16 Total assets (to be completed by all filers)	1,500,671.	1,807,541.	1,807,541.
17 Accounts payable and accrued expenses			
18 Grants payable			
g 19 Deferred revenue			
19 Deterred revenue 20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable			
21 Mortgages and other notes payable			
22 Other liabilities (describe >			
			SH
23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here		j	, ,
and complete lines 24 through 26 and lines 30 and 31.			•
24 Unrestricted 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			•
25 Temporarily restricted			
26 Permanently restricted			*
Foundations that do not follow SFAS 117, check here			•
and complete lines 27 through 31.	1		* · · · ·
27 Capital stock, trust principal, or current funds	0.	0.	-
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	NT a
Retained earnings, accumulated income, endowment, or other funds	1,500,671.	1,807,541.	
30 Total net assets or fund balances	1,500,671.	1,807,541.	
31 Total liabilities and net assets/fund balances	1,500,671.	1,807,541.	
Part III Analysis of Changes in Net Assets or Fund E	- Balances		
			
1 Total net assets or fund balances at beginning of year - Part II, column (a), line	e 30	, ,	1 500 651
(must agree with end-of-year figure reported on prior year's return)		1	1,500,671.
2 Enter amount from Part I, line 27a		2	-152,173.
3 Other increases not included in line 2 (itemize) ► <u>UNREALIZED</u>	GAIN ON INVEST		459,043.
4 Add lines 1, 2, and 3		4	1,807,541.
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, o	column (b), line 30	6	1,807,541.
			Form 990-PF (2009)

THE ANDERSEN FAMILY FOUNDATION, INC.

Form 990-PF (2009)

20-2898462 Page 2

	ANDERSEN FAMILY and Losses for Tax on In			NC.	•		2	0-289	8462	Page 3
(a) List and desc	ribe the kind(s) of property sold (e.g.	., real estate,		(b) H	low acc	quired (cquired	(d) Dat	
	rehouse; or common stock, 200 shs	s. MLC Co.)		D	- Donal	tion	(mo., da	ay, yr.)	(mo., d	ay, yr.)
1a PUBLIC TRADED	SECURITIES				I					
b K-1										
d .										
e										
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale					in or (loss) (f) minus (
a 686,312.			843,79	5.					-157	,483.
ь 873.										873.
С										
<u>d</u>				_						
<u>e</u>		<u> </u>	10/04/00							
Complete only for assets showing	ig gain in column (h) and owned by t							ol. (h) gain i ot less than		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any				Losses (from col. (t	1))	
a		ļ							-157	<u>,483.</u>
b										873.
С										
<u>d</u>				+						
<u>e</u>		L		$\overline{}$						
2 Capital gain net income or (net ca	pital loss) { If gain, also enter pital loss), enter -0-	in Part I, line i - in Part I, line	, 7)	2				-156	,610.
3 Net short-term capital gain or (los		d (6):		1						
If gain, also enter in Part I, line 8,	column (c).			} {	.			N/A		
If (loss), enter -0- in Part I, line 8 Part V Qualification U	nder Section 4940(e) for	Reduced	Tax on Net	Inve	estm	ent Inco	me	IN/ A		
	foundations subject to the section 4									
For optional use by domestic private	e loundations subject to the section 4	1340(a) iax on	Het myestinent up	COING.	-,					
lf section 4940(d)(2) applies, leave th	ns part blank.									
Was the foundation liable for the sec	tion 4942 tax on the distributable am	ount of any ye	ar in the base peri	ıod?					Yes	X No
If "Yes," the foundation does not qual	ify under section 4940(e). Do not co	mplete this pai	rt.							
1 Enter the appropriate amount in (each column for each year; see instru	uctions before	making any entrie	s.			,			
(a) Base period years	(b)			(c)			1	Distrib	(d) ution ratio	
Calendar year (or tax year beginni			Net value of nor				(col. (b) divi	ded by col.	
2008		9,275.		_2_		240.	<u> </u>			32007
2007		6,549.				674.				66571
2006		7,024.				409.				52010
2005		5,600.			404	1,427.			<u>•</u> +	<u> 19717</u>
2004							├			
2 Total of line 1, column (d)							2		2	70305
	 5-year base period - divide the total c	 nn line 2 hv 5 /	or hy the number	of vea					• 4	70303
the foundation has been in exister				01 y 01	41.5		3		. 0	67576
DIC TOUTHOUSEN THE DECIT IN CASSES				••	•	•				0,0,0
4 Enter the net value of noncharitab	ele-use assets for 2009 from Part X, I	line 5					4	· 	1,630	,524.
5 Multiply line 4 by line 3							5		110	,184.
6 Enter 1% of net investment incom	ne (1% of Part I, line 27b)						6			272.
									446	456
7 Add lines 5 and 6				-			7		110	,456.
8 Enter qualifying distributions fron	n Part XII, line 4	-					8		75	,126.
	line 7, check the box in Part VI, line	1b, and comp	lete that part using	g a 1%	6 tax ra	ite.				
See the Part VI instructions.									OOO !	DE (0000)
923521 02-02-10								FO	iin 390-1	PF (2009)

923521 02-02-10

	1990-PF (2009) THE ANDERSEN FAMILY FOUNDATION, INC. 20-2898			Page 4
Pa	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	instru	ıctio	ns)
1a	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)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%		5	44.
	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)			
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
			5	44.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	44.
6	Credits/Payments:			
_	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 3, 647.			
	Exempt foreign organizations - tax withheld at source			
	Tax paid with application for extension of time to file (Form 8868) 6c 6c			
	Backup withholding erroneously withheld 6d 6d			
	Total credits and payments. Add lines 6a through 6d		3.6	47.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8		<u> </u>	<u> </u>
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		3 1	03.
	Enter the amount of line 10 to be: Credited to 2010 estimated tax		<u> </u>	0.
	irt VII-A Statements Regarding Activities			<u> </u>
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	Γ	Yes	No
Id	any political campaign?	1a		X
.	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b	 -	X
U		}_ <u>''</u>		
	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.	••	l	x
	Did the foundation file Form 1120-POL for this year?	1c	 	<u> </u>
đ	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	} !	l	
	(1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0.	'	İ	ł
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		1	}
_	managers. ► \$	1	1	37
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	 	X
_	If "Yes," attach a detailed description of the activities.		Ι.	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or		1	1 77
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	 	X
	If "Yes," has it filed a tax return on Form 990-T for this year?	40	 	
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.	1	l	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:	1		
	By language in the governing instrument, or	1	1	l
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law	-	٠. ا	
	remain in the governing instrument?	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?	7	X	-
	If "Yes," complete Part II, col. (c), and Part XV.	-		ĺ
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)	. '		}
	MN	1	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	8b	<u> X</u>	
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	1 !	ĺ	
	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 and addresses	10		X
	For	m 990	-PF	(2009)

Part VII-A Statements Regarding Activities (continued) If I dary time dump the year, did the toundation, deceitly or indirectly, yown a controlled entity within the meaning of section \$12(t)(13)? If Yes, attach schedute (see instructions) 10 did the foundation acquire a decet or indirect interest in any applicable insurance contract before Angust 17, 2009? 13 Did the foundation acquire a decet or indirect interest in any applicable insurance contract before Angust 17, 2009? 14 The books are in care of PORGANIZATION 15 Section 4947(a)(1) nonexempt charitable trusts filing from 1990-FF in lieu of form 1041 - Check here and either the amount of tax-exempt interest received or accused during the year. 15 Section 4947(a)(1) nonexempt charitable trusts filing from 1990-FF in lieu of form 1041 - Check here and either the amount of tax-exempt interest received or accused during the year. 16 Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required 17 File Form 4720 farmy item is checked in the 7°e's column, unless an exception applies. 18 During the year and the foundation (either directly or indirectly): 19 Borrow money from, lend money for, or ilensing of property with a dequaled person? 20 Borrow money from, lend money for, or ilensing of property with a dequaled person? 21 Borrow money from, lend money for, or ilensing of property with a dequaled person? 22 Borrow money from, lend money for, or ilensing of property with a dequaled person? 23 Formation of your conservation, or pay or remburse the expenses of, a dequaled person? 24 Pay compensation in, or, pay or remburse the expenses of, a dequaled person? 25 Taxes on failure to distribution or, pay or remburse the expenses of, a dequaled person? 26 Agree to pay money or property of a poverment official? (Exception, Check Wo' 27 If the foundation agreed to make a grant to or to employ the official for a period after tarmation of your proper property of a poverment official? (Exception, Check Wo' 28 If the foundation on eng		990-PF (2009) THE ANDERSEN FAMILY FOUNDATION, INC. 20-289	8462		Page 5
section 512(b)(13)2 If Yes, a flactor schedule (see instructions) 20 th the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 30 bit the boundation comply with the public inspection requirements for its annual returns and exemption application? Website address ➤ N/A 11 The books are in care of ▶ ORGANIZATION 12 The books are in care of ▶ ORGANIZATION 13 Section 4947(a)(1) nonexempt charitable trists filing form 990-Fil in lea of form 1041 - Check here and entitle the amount of tax-exemption primers terevered or accused during the year 15 Section 4947(a)(1) nonexempt charitable trists filing form 990-Fil in lea of form 1041 - Check here and entitle the amount of tax-exemption interest tereventy or accused during the year 16 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 17 Tongage in the sale or exchange, or lessing of property with a disqualified person? 18 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 File Form 4720 if any item is checked in the "Yes" column, unless and exception applies. 10 File Form 4720 if any item is checked in the "Yes" column, unless and exception applies. 10 File Form 4720 if any item is checked in the "Yes" column, unless and exception applies. 10 File Form 4720 if any item is checked in the "Yes" column, unless and exception applies. 11 File Form 4720 if any item is checked in the "Yes" column, unless and exception applies. 12 File Form 4720 if any item is checked in the "Yes" column, unless and exception applies. 13 File Form 4720 if any item is checked in the "					
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ➤ N/A 15 The books are in care of ► ORGANIZATION Located at ► 6456 SMITHITOWN ROAD, EXCELSIOR, MN 27-14 ► 55331 18 Section 4947(3)(1) nonexempt charable thirst filing from 990-Filing from 1941-Chick there and either the amount of tax-exempt interest received or accurate during the year 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. 10 During the year did the foundation (either directly or indirectly): 11 Finage in the sale or exchange, or lessing of property with a disqualified person? 12 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) and sisqualified person? 13 Finantial poods, services, or facilities to (or accept them from) a disqualified person? 14 Finage in the sale or exchange, or lessing of property with a disqualified person? 15 Finantial poods, services, or facilities to (or accept them from) a disqualified person? 16 Finantial property or a power membrase the expenses of, a disqualified person? 17 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 18 Finantial register any income or assets to a disqualified person? 19 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 10 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 10 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 10 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 10 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 10 Finage in the sale or exchange or embrase the expenses of, a disqualified person? 10 Finage in the sale or	11				
August 17, 2008? 10 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A 11 The books are in care of ► ORGANIZATION Located at ► 64 56 SMITHYOWN ROAD, EXCELSIOR, MN 12 PAH ▶ 55 33 1 15 Section 4947(a)(1) nonexempt charitable trusts filing from 1990 PF in lieu of Form 1041 - Check here and other the anount of tax-reventing linterest accession of accured during the year 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. 1 a During the year of the foundation (either directly or endirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend nonely too, retinating the preson? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available or the the inefficial or pay money to 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). 10 If any answer is "Yes" to al(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.49 (H)(3) or an activation of adaptation engage in a prior year any of the acts described in a, other than exception acts, that were not corrected before the first day of the tax year beginning in 2009? 11 Texes on failure to distributive income (section 4942) (does not alphyling section 4942(a)(2) to all years listed, answer No' and attach statement - see instructions). 1			111		<u> X</u>
13 Dd the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A 14 The books are in case of ▶ ORGANIZATION Located at ▶ 6456 SMITHTOWN ROAD, BXCELSIOR, MN 17 Section 4947(a)(f) nonerwant plantaristic trusts thing from 990-PF in lieu of form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year and enter the amount of tax-exempt interest received or accrued during the year during the year duft the foundation (either directly or indirectly): 18 Elements the Seale or exchange, or leasing of property with a dequalified person? 19 Elements (and the seale or exchange, or leasing of property with a dequalified person? 20 Elements (and the seale or exchange, or leasing of property with a dequalified person? 21 Elements (and the seale or exchange, or feating expense or), a dequalified person? 22 Elements (and the seale or exchange, or feating the property or accruent for the property of property or or property and accruent for accruent for the benefit or use of a dequalified person? 22 Elements (and the seale or exchange, or feating the sealed person)? 23 Elements (and the sealed person)? 24 Elements (and the sealed person)? 25 Elements (and the sealed person)? 26 Elements (and the sealed person)? 27 Elements (and the sealed person)? 28 Elements (and the sealed person)? 29 Elements (and the sealed person)? 29 Elements (and the sealed pe	12				
Webste address ► M/A The books are in care of ► ORGANIZATION Located at ► 6456 SNITHTOWN ROAD, BXCELSIOR, MN 2IP-4 ► 55331 15 Section 4947(a)(1) nonexempt charactable trusts thing form 990-PF in lieu of Form 1041 - Check here and enter the measured that severe mit interest received or accured during the year 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. 1 a During the year dd the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of properly with a desqualited person? (2) Borrow money from, lead money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or tay or reimburse the expenses of, a disqualified person? (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 (face)? (6) Agree to pay money or property to a povernment official? (Exception, Check No* if the floundation agreed to make a grant to or the employ the official for a period after termination of government service, if terminating within 90 days.) b if any answer is "Yes" to 1(1)-(6), did any of the acts also to quality under the exceptions described in Regulations section 53-49 ft(1)-3 or in a current notice regarding disaster assistance check here 0 bd the foundation engage in a nor yes in any of the acts described in 1, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? 2 Taxes on failure to distribution successory (14 applying the provisions of section 4942(a) (2) relating to incorrect valuation of assets) by the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer No* and attach statement - see instructions.) b if the provisions of section 4942(a)(2) are					<u>X</u>
14. The books are in care of ▶ ORGANIZATION Located at ▶ 6456 SMITHTOWN ROAD, EXCELSIOR, MN 2/P-4 ▶55331 15. Section 4947(3)(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 Part VII-B Statements Regarding Activities for OrWhich Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): 13. Forming the year did the foundation (either directly or indirectly): 14. Engage in the sale or exchange, or leasing of property with a disqualified person? 15. Borrow money from, lend money to, or otherwise extend credit to for accept it from) 16. Borrow money from, lend money to, or otherwise extend credit to for accept it from) 17. Statistical property or a power more of the expenses of a disqualified person? 18. Forming any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) or make any of either available for the benefit or use of a disqualified person (or make any of either available) 18. If any any income or assets to a disqualified person (or make any of either available) 19. If any any income or property via a government official? (Exception, Check 'No' 19. If the foundation agreed to make a grant to or to employ the official for a period after termination of powernment service, it terminating within 90 days.) 19. If any any are in 'Yes' to '14(-)6, did any of the acts fall to quality under the exceptions described in Regulations section 53.4941 (0)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 19. A the end of tax year 2009, and the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning foundation defined in section 4942((0)) or 4942((0)(5)): 20. At the end of tax year 2009, did the foundation have any undist	13	!-	13	<u> X</u>	L
Located at \$ 6456 SMTPHTOWN ROAD, EXCELSTOR, MN It Section 4947(3/1) nonexempt chartable trusts filing form 990-PF in lieu of Form 1041-Check here and enter the amount of tax-exempt interest received or accured during the year Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required FIHE Form 4720 if any item is checked in the "Yes" column, unless an exception applies. It plays the season of the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) b) It 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(0)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Version of the foundation engage in a prior year in any of the acts face check here Did the foundation engage in a prior year in any of the acts face check here Did the foundation engage in a prior year in any of the acts face the check here Did the foundation engage in a prior year in any of the acts face check here Did the foundation engage in a prior year in any of the acts face here here here here are any experiment of the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If 'Yes, itsi the years' is undistr			70 6	405	
15 Section 4947(a)(1) nonexempt chartable trusts fing Form 990-PF in leu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year PAT 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. 1a During the year dd the foundation (either decelly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (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 for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for the benefit or use of a disqualified person for make any of either available for a period after termination of government service, if termination disputed for a	14			405	
and enter the amount of tax-exempt interest reserved or accrused during the year Port 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. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept if from) a disqualified person? (3) Furrish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) (b) If any answer is Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53-441(0)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? (b) Agrae to year degranging a prior year in any of the acts falls to qualify under the exceptions described in Regulations section 4942(i)(3) or a vagrae beginning disaster assistance (see page 20 of the instructions)? (c) Agrae to fall 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? 1a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Parl XIII) for tax year(s) beginning before 2009? 1f Yes, Si the years is taked in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets)			<u> 5331</u>		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either droctly or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise settend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept tem from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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 (or make any of either available for the benefit or use of a disqualified person)? (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.) b I amy answer is "Yes" to 14(1-6), did any of the acts fast fou quality under the exceptions described in Regulations section 53.4941(d)-3 or m a current notice regarding disaster assistance (see page 20 of the instructions)? N/ A Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? N/ A The section of the tax year beginning in 2009? 1 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? If Yes, is the years A 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? If Yes, is the years is the dial 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 isted, answer 'No' and attach statement - see instructions'. If yes is the years is the p	15			<i>,</i> _►	· []
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available to the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant for or to employ the official for a period after termination of government service, if terminating within 90 days.) 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 53-491(0)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? N/A Takes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a) or 4942(f)(3): 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? If 'Yes Sk No b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (all years listed, answer 'No' and attach statement-see instructions). A the their povisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. A 2b 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	_		N	/A_	
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any or either available for the benefit or use of a disqualified person) (or make any or either available for the benefit or use of a disqualified person) (or make any or either available for the benefit or use of a disqualified disaster assistance check here be obdithe 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 Taxes on failure to distribute income (setton 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(a)(3)	Ра				
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (6) Agree to pay money or property to a government official? (Exception, Check *No* if the foundation apred to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) 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 53.441 (G)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 7) Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(6)): 8) 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? 11 Yes, list the years \bigcite			 	Yes	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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 terrimation of government service, if terminating within 90 days.) b If any answer is 'Yes' to 14(1)-(6), did any of the acts fall 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)? N/A Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? 10 The section 4942(a)(3) or 4942(b)(3) or alyout the foundation and 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? 11 The section 4942(a)(3) or 4942(b)(6)(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? 11 The section 4942(a)(2) are being applied to any of the years listed, answer 'No' and attach statement - see instructions.) 12 Takes on failure to distribute functions? 13 Further any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) 25 If the provisions of section 4942(a)(2) are being applied to any of the year site and in 2a, list the year's here. 26 If the foundation hold more than a	1a				ı
a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.). (8) If any naswer is Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.494 (10)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? (9) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (10) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (10) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (10) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (10) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (11) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (12) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (13) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (14) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? (15) Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions). (16) Organizations relying on a current notice regarding disaster assistance (see page 20 of the i			-{		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.) 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 53.491(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Ciparizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? Ciparizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? Ciparizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? Ciparizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? N/A 1b Ciparizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? N/A 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(i)(3) or 4942(i)(5): a At the end of tax year 2009, did the foundation have any undistributed income (limes 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If 'Yes, 'Ist the years \begin{array}{c} b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) b If 'Yes, 'Idi it have excess b			1		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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 (or make any of either available for the benefit or use of a disqualified person)? (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.) b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fall 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)? N/A Organizations relying on a current notice regarding disaster assistance check here b Old 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 Takes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(3) o			}		,
(5) Transfer any income or assets to a disqualified person)? (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.) 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(6)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? 1]		
for the benefit or use of a disqualified person)? (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.) 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)? 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 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(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? If 'Yes, 'list the years \ b Are there any years histed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) N/A 2b 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 of rollings 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.) A Did the foundation invest during the year any amount in a manner that would geopardize its charita		(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			•
(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.) 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)? 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? 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? If 'Yes, list the years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. About the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? All the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7))					
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.) 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)? 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? 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? If Yes, 'list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) N/A 2b If Yes, 'did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If Yes, 'did the vexcess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 1a Did the foundation invest during the year any amount in a manner that would jeopardize its charitab		for the benefit or use of a disqualified person)?			
termination of government service, if terminating within 90 days.) 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)? 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? 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? If Yes, list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If Yes, 'did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation invest during the year any amount i		(6) Agree to pay money or property to a government official? (Exception. Check "No"	1	lu.	
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 (see page 20 of the instructions)? It is 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? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)): A If the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Parl XIII) for tax year(s) beginning before 2009? If "Yes," list the years Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4943(a)(2) are being applied to any of the years listed in 2a, list the years here. In the provisions of section 4943(a)(b) and years listed in 2a, list the years here. In the provisions of section 4943(a)(b) and years listed in 2a, list the years here. In the provisions of section 4943(a)(b) and years listed in 2a, list the years here. In the provisions of section 4943(a)(b) and years listed in 2a, list the years here. In the provisions of section 4943(a)(b) and years listed in 2a, list		if the foundation agreed to make a grant to or to employ the official for a period after			
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 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? 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(i)(3) or 4942(i)(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? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) C if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. D 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 grift 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.) A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?		termination of government service, if terminating within 90 days.)			
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? 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? If Yes, list the years INDEAD INDE	b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
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? 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(i)(3) or 4942(i)(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? If Yes, list the years Yes No b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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 of inoger 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.) A Did the foundation mixes during the year any amount in a manner that would geopardize its charitable purposes? 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?		section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
before the first day of the tax year beginning in 2009? 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? If "Yes," list the years \		Organizations relying on a current notice regarding disaster assistance check here			
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(i)(3) or 4942(i)(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? If Yes, list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 2b 3c Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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.) A 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?	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		1	
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(i)(3) or 4942(i)(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? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 2b 3c Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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.) A 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?		before the first day of the tax year beginning in 2009?	10		X
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? If "Yes," list the years Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A 2b If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose? 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?	2				
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? If "Yes," list the years Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) (relating to incorrect valuation in a year listed, answer "No" and attach stated by any of any attach the year any amount in any of the years listed in 2a, list the years listed, answer "No" and attach stated listed. If the provisions of section 4942(a)(2) (relating to incorrect valuation 4942(a)(2) (relating to incorrect valuation invost during the year's undistributed income? If the provisions of section 4942(a)(2) (relating to incorrect valuation invost and attach state beginning in 2009 (list any of the year any any of the year any any beginning in 2009? If the provisions of section 4942(a)(2) (list any a					•
before 2009? If "Yes," list the years Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years listed, answer "No" and attach will appear on a provision and attach any of the year any amount in any purchase by the foundation or disqualified persons after any time during the year any amount in a provision any business enterpr	а				,
If "Yes," list the years \					'
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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.) A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4 a 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?					
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?	b			-	,
statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			1 1	1	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Sa Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Sa Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Sa Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes		attatement and unattrustrana.)	2b		
Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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.) 1	c			$\neg \neg$	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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.) 13b	Ū			ļ	
during the year? 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.) Aa Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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? Ves X No Yes X No A 25 A 25 A 36 X A 36 X A 36 X A 36 X A 36 A 37 A 36 A 37 A 38	3 <i>a</i>			}	
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.) A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? A 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? A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	-				. 25
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.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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?	h				
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.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009? 4b X	_] !	- [
Form 4720, to determine if the foundation had excess business holdings in 2009.) 1 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 2 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? 3 b X				Ì	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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			3h	1	~
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	Δa				<u>x</u>
had not been removed from jeopardy before the first day of the tax year beginning in 2009?			-7a		
	J		dh	•	x
				-PF	

923541 02-02-10

Form 990-PF (2009) THE ANDERSEN FAMILY FOUN			<u> 20-28984</u>	62 Page 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be I	Required (contin	ued)	
5a During the year did the foundation pay or incur any amount to:				1 1
(1) Carry on propaganda, or otherwise attempt to influence legislation (section			es X No	
(2) Influence the outcome of any specific public election (see section 4955); (or to carry on, directly or indire			1 1
			es X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes	37	Ye	es X No	1 1
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section			1 1
509(a)(1), (2), or (3), or section 4940(d)(2)?		Y6	es X No	'
(5) Provide for any purpose other than religious, charitable, scientific, literary			l	
the prevention of cruelty to children or animals?			s X No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	in Regulations		1
section 53.4945 or in a current notice regarding disaster assistance (see instru			N/A	5b 1
Organizations relying on a current notice regarding disaster assistance check h				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f		ned .		
expenditure responsibility for the grant?		. —	es 🔲 No	1 1
If "Yes," attach the statement required by Regulations section 53 494		.,	.5 110	1 1
				1 1
6a Did the foundation, during the year, receive any funds, directly or indirectly, to			es X No	} }
a personal benefit contract?		. L Y6		n. 37
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?			6b X
If "Yes" to 6b, file Form 8870.		<u></u>	(1 1 1
7a At any time during the tax year, was the foundation a party to a prohibited tax s		. L Ye	es X No	`
b If yes, did the foundation receive any proceeds or have any net income attribut				7b
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	ees, Foundation Ma	inagers, Highly	y	
1 List all officers, directors, trustees, foundation managers and their		(-) Companyation	(d) Contributions to	
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
(a) Name and address	to position	enter -0-)	compensation	allowances
JAMES ANDERSEN	SECRETARY/TRE	ASURER	ļ	
6456 SMITHTOWN ROAD				
EXCELSIOR, MN 55331	3.00	0.	0.	0.
PATRICIA ANDERSEN	PRESIDENT			-
6456 SMITHTOWN ROAD				
EXCELSIOR, MN 55331	3.00	0.	0.	0.
	1		}	
	1			
				
	1			
)		
2 Compensation of five highest-paid employees (other than those inc	luded on line 1), If none,	enter "NONE."	L	
	(b) Title, and average	I	(d) Contributions to	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deterred compensation	(e) Expense account, other allowances
NONE	devoted to position	 	Compensation	allowalices
NONE	1			
 				
	-			
·		ļ		
 	-	!		
	ļ	ļ		
]]		
		<u></u>		
Total number of other employees paid over \$50,000				0
	-		Earm C	200-DE (2000)

923551 02-02-1

923581

Total, Add lines 1 through 3

Form 990-PF (2009)

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see instructions) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 1,591,437. a Average monthly fair market value of securities ta 63,917. Average of monthly cash balances 1b Fair market value of all other assets 1c 1,655,354. 1d d Total (add lines 1a, b, and c) Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 1,655,354. 3 3 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 24,830. 1,630,524. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 5 81,526. Minimum investment return. Enter 5% of line 5 6 Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here
and do not complete this part.) 81,526. Minimum investment return from Part X, line 6 Tax on investment income for 2009 from Part VI, line 5 Income tax for 2009. (This does not include the tax from Part VI.) 2b Add lines 2a and 2b 2с 3 80.982. Distributable amount before adjustments. Subtract line 2c from line 1 3 Recoveries of amounts treated as qualifying distributions 4 4 80,982. 5 5 Add lines 3 and 4 Deduction from distributable amount (see instructions) 6 6 ,982. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 75,126. Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a а 1b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: 3 Suitability test (prior IRS approval required) 3a 3b Cash distribution test (attach the required schedule) 75,126. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income, Enter 1% of Part I, line 27b Adjusted qualifying distributions. Subtract line 5 from line 4 Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2009)

Part XIII .Undistributed Income (see instructions)

•	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI,				
line 7				80,982.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:				
		0.	· · · · · · · · · · · · · · · · · · ·	
3 Excess distributions carryover, if any, to 2009:				
a From 2004				'
b From 2005				
c From 2006				
d From 2007 16,031.		•		
e From 2008	4.6.004		,	
f Total of lines 3a through e	16,031.	<u> </u>	<u></u>	
4 Qualifying distributions for 2009 from				
Part XII, line 4: ►\$ 75,126.	_	,		
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior	,	•		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	•		•	
(Election required - see instructions)	0.			75 406
d Applied to 2009 distributable amount				75,126.
e Remaining amount distributed out of corpus	0.		<u> </u>	F 056
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	5,856.		1	5,856.
6 Enter the net total of each column as indicated below:				,
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	10,175.			
b Prior years' undistributed income. Subtract	,			
line 4b from line 2b	- 4	0.		` ·
c Enter the amount of prior years'			,	
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable	······································	<u></u>		· ,
amount - see instructions	,	0.		
e Undistributed income for 2008. Subtract line	 , 	,		
4a from line 2a. Taxable amount - see instr.	,	,	0.	,
f Undistributed income for 2009. Subtract		,	,	
lines 4d and 5 from line 1. This amount must	, ,			
be distributed in 2010	•	,		0.
7 Amounts treated as distributions out of		. 1	1	,
corpus to satisfy requirements imposed by		,		*. *. ,
section 170(b)(1)(F) or 4942(g)(3)	0.		*	· ,
8 Excess distributions carryover from 2004		-	•	
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010.			•	4
Subtract lines 7 and 8 from line 6a	10,175.			
10 Analysis of line 9:			ì	
a Excess from 2005				
b Excess from 2006	. ,	, , ,	,	'
c Excess from 2007 10,175.		·	* *	- , , ,
d Excess from 2008	, .		•	,
e Excess from 2009		<u>' • • </u>	<u> </u>	

923581 02-02-10 Form **990-PF** (2009)

		Y FOUNDATIO			98462 Page 10
Part XIV Private Operating Fo			II-A, question 9)	N/A	
1 a If the foundation has received a ruling or					
foundation, and the ruling is effective for				10 (0 () (0)	
b Check box to indicate whether the found		ng foundation described		4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year (a) 2009	(b) 2008	Prior 3 years (c) 2007	(d) 2006	(a) Tatal
income from Part I or the minimum	(a) 2009	(0) 2000	(6) 2007	(0) 2000	(e) Total
investment return from Part X for					
each year listed			<u> </u>		
b 85% of line 2a			 		
c Qualifying distributions from Part XII,					
line 4 for each year listed			<u> </u>		
d Amounts included in line 2c not					
used directly for active conduct of		ļ			
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			ļ		
(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		j			
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				<u> </u>	
Part XV Supplementary Infor			if the foundation	had \$5,000 or me	ore in assets
at any time during th	ne year-see the	instructions.)			
1 Information Regarding Foundation	_				
a List any managers of the foundation who year (but only if they have contributed m	have contributed more ore than \$5,000). (See s	than 2% of the total consection 507(d)(2).)	tributions received by the	foundation before the clo	se of any tax
SEE STATEMENT 10				···	
b List any managers of the foundation who other entity) of which the foundation has			(or an equally large portion	n of the ownership of a p	artnership or
NONE				w	
2 Information Regarding Contribution			-		
Check here 🕨 🗶 if the foundation or					
the foundation makes gifts, grants, etc. (see instructions) to indi	viduals or organizations t	under other conditions, co	mplete items 2a, b, c, and	1 d.
a The name, address, and telephone numb	er of the person to who	m applications should be	addressed:		-
b The form in which applications should be	submitted and informa	tion and materials they s	hould include:		
c Any submission deadlines:					
d Any restrictions or limitations on awards	, such as by geographic	al areas, charitable fields.	, kinds of institutions, or o	ther factors:	

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		Purpose of grant or	
	any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year		}		
	ł			
	ł			
	1	}]	
	1		1	
	}]	,	
		1		
	ļ			
	ļ			
		1		
	ì	1		
	ļ	}		
	ì	i		
	ļ	ļ		
]		
	İ			
	ĺ			
	}			
	(1		
SEE STATEMENT 11		1		
Total			▶ 3a	72,60
Approved for future payment	T			
	ļ	į l		
NONE	1	l		
	j			
		ĺ		
	j			
		1		
		1		
		1		
		}		
		[
Total			▶ 3b	·
11 02-02-10				rm 990-PF (2

Enter gross amounts unless otherwise indicated.	Unrelated b	usiness income		by section 512, 513, or 514	(e)
·	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	Cour		+		
ab	-		 		
	1 1		1		
d	1 1				
_	l .				
e	-				
g Fees and contracts from government agencies	-				
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments	1				
4 Dividends and interest from securities			14	31,514.	<u></u>
5 Net rental income or (loss) from real estate:	,				
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income			14	7,967.	
8 Gain or (loss) from sales of assets other					
than inventory	1		18	-156,610.	
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory					
1 Other revenue:					
a					
		_			
	_ [
b	1				
b	-				
b	-				
b c d	-	0		-117,129.	
b					-117,129
b		0			
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.)				13	
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e)				13	
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,12
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,12
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129
b c d e 2 Subtotal. Add columns (b), (d), and (e) 3 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc	to the Accom	nplishment of l	Exempt P	urposes	-117,129

Form 990-		NDERSEN FAMILY				2898462 Page	13
Part X		egarding Transfers To	and Transactions ar	nd Relation	onships With Nor	charitable	
	Exempt Organ					1 52 1	_
		rectly engage in any of the following			section 501(c) of	Yes N	lo
	•)(3) organizations) or in section 53		zations?			
	• •	ation to a noncharitable exempt or	rganization of:				
(1) (<u>X</u>
	Other assets					1a(2) 2	<u>X</u> _
b Other	transactions:						
(1) 5	Sales of assets to a noncharita	ble exempt organization					<u>X</u>
(2) F	Purchases of assets from a no	ncharitable exempt organization .					X_
(3) F	Rental of facilities, equipment,	or other assets	•			·	X_
(4) F	Reimbursement arrangements				,		Χ_
(5) L	oans or loan guarantees				•		<u>K</u>
(6) F	Performance of services or me	mbership or fundraising solicitation	ons			· · · · · · · · · · · · · · · · · · ·	X_
c Sharı	ng of facilities, equipment, ma	uling lists, other assets, or paid em	nployees			1c 2	<u>X</u> _
d If the	answer to any of the above is	"Yes," complete the following sche	edule. Column (b) should alwa	ays show the f	fair market value of the gi	oods, other assets,	
or se	rvices given by the reporting fo	oundation. If the foundation receiv	ed less than fair market value	in any transac	ction or sharing arrangen	nent, show in	
colun	nn (d) the value of the goods,	other assets, or services received.					
(a) Line no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Descri	ption of transfers, transaction	s, and sharing arrangements	
		N/A					
							_
					·		_
	 				· · · · · · · · · · · · · · · · · · ·		_
	 			 			_
				 			
	 			 			
			_ 	+			
				 			
				 -			_
	ļ			 			_
	 	 		 			—
	 			 			_
							
				 			
	<u></u>	<u> </u>		l			
		tly affiliated with, or related to, one		ations describe	ed		
		r than section 501(c)(3)) or in sec	tion 527?			Yes X N	10
b If "Ye	s," complete the following sch						_
	(a) Name of org	ganization	(b) Type of organization		(c) Description of rel	ationship	_
	N/A		<u> </u>				_
			<u> </u>				
			<u> </u>				
		·				·—··	
	A						
		nave examined this return, including acco				ef, it is true, correct,	
and cor	npiete Decipitation of preparer (other	er than taxplayer or fiduciary) is based on	- 1.	_			
	$(\lor \ \lor)$		5.11/1	a Tr	CASILE		
Si	ignature of officer or trustee	 	Date	Title			
Ĭ	Preparer's		Da	#]		Preparer's identifying number	_
Sign Here	signature	-11 UM		15/10	self- employed >	4790/24	

Form **990-PF** (2009)

612-376-4500

Firm's name (or yours LARSONALLEN LLP 220 SOUTH SIXTH STREET, SUITE 300 address, and ZIP code MINNEAPOLIS, MN 55402

EIN 🕨

Phone no.

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

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

Name of the organization	on	Employer identification number
	THE ANDERSEN FAMILY FOUNDATION, INC.	20-2898462
Organization type (chec	ik one):	
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organization	
	4947(a)(1) nonexempt chantable trust not treated as a private foundation	
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	
	501(c)(3) taxable private foundation	
	on is covered by the General Rule or a Special Rule. I (c)(7), (8), or (10) organization can check boxes for both the General Rule and a Specia	al Rule See instructions.
General Rule		
_	tion filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (mplete Parts I and II.	în money or property) from any one
Special Rules		
509(a)(1) and 1	01(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the 70(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.	
aggregate cont	01(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one conductions of more than \$1,000 for use exclusively for religious, charitable, scientific, liter of cruelty to children or animals Complete Parts I, II, and III.	
contributions fo If this box is che purpose. Do no	01(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one corruse exclusively for religious, charitable, etc., purposes, but these contributions did no ecked, enter here the total contributions that were received during the year for an exclust complete any of the parts unless the General Rule applies to this organization becausable, etc., contributions of \$5,000 or more during the year.	ot aggregate to more than \$1,000. usively religious, chantable, etc,
but it must answer "No"	on that is not covered by the General Rule and/or the Special Rules does not file Sched on Part IV, line 2 of its Form 990, or check the box on line H of its-Form 990-EZ, or on filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).	
LHA For Privacy Act at for Form 990, 990	·	ule B (Form 990, 990-EZ, or 990-PF) (2009)

Schedule B (F	Form 990, 990-EZ, or 990-PF) (2009)		Page 1 of 1 of Part I
Name of or	ganization	Emplo	oyer identification number
THE A	NDERSEN FAMILY FOUNDATION, INC.	2	0-2898462
Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JAMES AND PATRICIA ANDERSEN		Person X Payroll
	6456 SMITHTOWN ROAD EXCELSIOR, MN 55331	\$52,501.	Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person Payroll Onnocash Complete Part II of there

12000501 131839 02118

FORM 990-PF DIVIDED	NDS AND	INTER	EST FROM	SECU	JRITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		PITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
INVESTMENT DIVIDENDS	-		31,514.		0.	31,51	4.
TOTAL TO FM 990-PF, PART I,	LN 4		31,514.		0.	31,51	4.
FORM 990-PF	O ⁱ	THER I	NCOME			STATEMENT	2
DESCRIPTION		:	(A) REVENUE PER BOOK		(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM	
K-1 INVESTMENT			7,9	967.	7,967	•	
TOTAL TO FORM 990-PF, PART	I, LINE	11	7,	967.	7,967		
FORM 990-PF		LEGAL	FEES			STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN	EST-			
LEGAL FEE		135.		0.		13	5.
TO FM 990-PF, PG 1, LN 16A		135.		0.	· · · · · · · · · · · · · · · · · · ·	13	5.
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	4
		A)	(B) NET INV	EST-	(C) ADJUSTED	(D) CHARITAE	BLE
DESCRIPTION	EXPE: PER	nses Books	MENT IN		NET INCOM		
DESCRIPTION ACCOUNTING FEE	PER				NET INCOM		S
	PER	BOOKS		COME	NET INCOME	E PURPOSE	6 ·

FORM 990-PF (OTHER PROFES	SIONAL FE	ES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE: MENT INC		(C) ADJUSTED NET INCOM		
INVESTMENT FEES	11,833.	11,8	833.			0.
TO FORM 990-PF, PG 1, LN 16C	11,833.	11,8	833.			0.
FORM 990-PF	TAX	ES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO				
FOREIGN TAXES	450.	4	450.			0.
TO FORM 990-PF, PG 1, LN 18 =	450.	4	450.			0.
FORM 990-PF	OTHER E	XPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO		(C) ADJUSTED NET INCOM		
MN AG FILING	25.		0.			25.
TO FORM 990-PF, PG 1, LN 23	25.		0.			25.
FORM 990-PF	CORPORAT	E STOCK			STATEMENT	8
DESCRIPTION			вос	K VALUE	FAIR MARKE	Т
DESCRIPTION FIXED INCOME-SEE STATEMENT 12 EQUITIES-SEE STATEMENT 12 ALTERNATIVE INVESTMENTS-SEE STATEMENTS-SEE	STATEMENT 12	- MENT 12	ВОС	280,374. 595,969. 186,858. 95,048.		74. 69. 58.

FORM 990-PF OTHER	RINVESTMENTS		STATEMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKE VALUE	Т
ANNUITY AXA 48,303.3522 UNITS	FMV	577,655.	577,6	55.
TOTAL TO FORM 990-PF, PART II, LINE	13	577,655.	577,6	55.
	7 - LINE 1A NDATION MANAGE		STATEMENT	10

NAME OF MANAGER

JAMES ANDERSEN PATRICIA ANDERSEN

STATEMENT 11

FORM 990-PF

	DURING THE YEAR		
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AMERICAN UNIVERSITY 4400 MASSACHUSETTS AVENUE NW WASHINGTON, DC 20016	OPERATING SUPPORT	PUBLIC CHARITY	3,000.
CARING FOR KIDS INITIATIVE 110 GRAND AVE WAYZATA, MN 55391	OPERATING SUPPORT	PUBLIC CHARITY	1,000.
GREATER MINNEAPOLIS CRISIS NURSERY 5400 GLENWOOD AVENUE GOLDEN VALLEY, MN 55402	OPERATING SUPPORT	PUBLIC CHARITY	1,500.
HOLY FAMILY CATHOLIC HIGH SCHOOL 8101 KOCHIA LANE VICTORIA, MN 55386	OPERATING SUPPORT	PUBLIC CHARITY	22,500.
LOVE, INC. 1600 BAVARIA ROAD CHASKA, MN 55318	OPERATING SUPPORT	PUBLIC CHARITY	1,000.
LUNGEVITY FOUNDATION 435 N LASALLE ST, SUITE 310 CHICAGO, IL 60654	OPERATING SUPPORT	PUBLIC CHARITY	7,000.
MAKE A WISH FOUNDATION OF METRO NEW YORK 1111 MARCUS AVENUE, SUITE LL22 LAKE SUCCESS, NY 10042	OPERATING SUPPORT	PUBLIC CHARITY	500.
MENTORING PARTNERSHIP OF MINNESOTA 81 SOUTH 9TH STREET SUITE 200 MINNEAPOLIS, MN 55402	OPERATING SUPPORT	PUBLIC CHARITY	8,000.

GRANTS AND CONTRIBUTIONS

THE ANDERSEN FAMILY FOUNDATION,	INC.		20-2898462
MINNETONKĄ PUBLIC SCHOOLS FOUNDATION 5621 COUNTY ROAD 101 MINNETONKA, MN 55345	TEACHER GRANT	PUBLIC CHARITY	1,000.
PARK NICOLLET FOUNDATION P. O. BOX 650 MINNEAPOLIS, MN 55440	TO SUPPORT CANCER CARE FUND	PUBLIC CHARITY	1,000.
ST JOHN THE BAPTIST CATHOLIC CHURCH 680 MILL STREET EXCELSIOR, MN 55331	OPERATING SUPPORT	PUBLIC CHARITY	5,000.
THE HUBBARD MESUEM OF THE AMERICAN WEST P. O. BOX 449 1461 HWY 70 W RUIDOSO DOWNS, NM 88346	OPERATING SUPPORT	PUBLIC CHARITY	7,000.
TRINITY WASHINGTON UNIVERSITY 125 MICHIGAN AVENUE NE WASHINGTON, DC 20017	OPERATING SUPPORT	PUBLIC CHARITY	2,000.
UNIVERSITY OF MINNESOTA FOUNDATION 200 OAK STREET SE, SUITE 500 MINNEAPOLIS, MN 55455	TO SUPPORT ON CAMPUS STADIUM FUND	PUBLIC CHARITY	12,100.

72,600.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

Ϋ́Ε	
WELLS	

Account Statement For: ANDERSEN FAMILY FOUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

ASSET DETAIL

Asser Description Cash & Equivalents	Quantity	Price	Market Value as of 12/31/09	Cost Basis	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	CURRENT VIELD
CASH PRINCIPAL Total Cash			\$2,695.72 \$2,695.72	\$2,695.72 \$2,695.72	\$0.00		
WELLS FARGO ADVANTAGE CASH INVESTMENT MONEY MARKET SERVICE #250	51,038.340		\$51,038.34	\$51,038.34	\$0.00	\$5.10	0.01%
Total Money Market			\$51,038.34	\$51,038.34	\$0.00	\$5.10	0.01%
Total Cash & Equivalents			\$53,734.06	\$53,734.06	\$0.00	\$5.10	0.01%
Asser Description Fixed Income	PAR VALUE	PRICE	Market Value as of 12/31/09	Cost Basis	Unrealized	ESTIMATED VIELD TO ANNUAL INCOME MATURITY	VIELD TO
CORPORATE OBLIGATIONS AMERICAN EXPRESS DTD 07/24/03 4.875 07/15/2013 CUSIP: 025816AQ2 MOODY'S RATING: A3 STANDARD & BOOD'S BATING: RRR-	25,000.000	\$104.338	\$26,084.50	\$24,866.75	\$1,217.75	\$1,218.75	3.56%
BANK OF NEW YORK MELLON DTD 08/27/08 5.125 08/27/2013 CUSIP: 06406HBK4 MOODY'S RATING: AA2 STANDARD & POOR'S RATING: AA-	25,000 000	107.953	26,988.25	24,060.83	2,927.42	1,281.25	2.82
BELLSOUTH CORP DTD 09/13/04 5.200 09/15/2014 CUSIP. 079860AG7 MOODY'S RATING: A2 STANDARD & POOR'S RATING: A	25,000.000	107.099	26,774.75	25,190.00	1,584.75	1,300.00	3.55
							8 of 91

Account Statement For	ANDERSEN FAMILY FO
	WELLS FARGO

or: DUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

Asser Description Fixed Income (continued)	PAR VALUE	Price	MARKET VALUE AS OF 12/31/09	Cost Basis	Unreauzed Gain/Loss	ESTIMATED ANNUAL INCOME 1	Уієць то Мативіту
CORPORATE OBLIGATIONS (continued) BERKSHIRE HATHAWAY FIN CORP DTD 01/11/05 4.850 01/15/2015 CUSIP: 084664AT8 MODDY'S RATING: AA2	25,000.000	107.064	26,766.00	23,728.50	3,037.50	1,212.50	3.32
STANDARD & POOR'S RATING: AAA GENERAL ELEC CAP CORP MED TERM NOTE DTD 10/20/06 5.375 10/20/2016 CUSIP: 36962GY40	25,000.000	103.974	25,993.50	25,386.25	607.25	1,343.75	4.69
MOODY'S RATING: AA2 STANDARD & POOR'S RATING: AA+ HEWLETT-PACKARD CO DTD 03/03/08 5.500 03/01/2018 CUSIP: 428236AS2	25,000.000	106.334	26,583.50	25,580.50	1,003.00	1,375.00	4.56
MODDY'S KATING: A STANDARD & POOR'S RATING: A HSBC FINANCE CORP DTD 04/20/05 5.250 04/15/2015 CUSIP: 40429CR1	25,000.000	103.892	25,973.00	24,855.50	1,117.50	1,312.50	4.42
MODOT S RATING: A STANDARD & POOR'S RATING: A WAL-MART STORES DTD 01/20/05 4.000 01/15/2010 CUSIP: 9311428X0	25,000.000	100.091	25,022 75	25,495.00	- 472.25	1,000.00	4.00
MODDY'S KALING: AAZ STANDARD & POOR'S RATING: AA Total Corporate Obligations			\$210,186.25	\$199,163.33	\$11,022.92	\$10,043.75	



Period Covered: January 1, 2009 - December 31, 2009



ASSET DETAIL (continued)							
Asset Description Fixed Income	QUANTITY	Price	Market Value as of 12/31/09	Cost Basis	UNREALIZED GAIN/LOSS	ESTIMATED Annual Income	CURRENT
MUTUAL FUNDS ISHARES BARCLAYS TIPS BOND FUND	120.000	\$103.900	\$12,468 00	\$12,177.56	\$290.44	\$485.04	3.89%
PIMCO FLOATING RATE INCOME FD	1,163.000	11 290	13,130 27	7,639.75	5,490.52	874.58	99.9
CUSIP: 72201H108 PUTNAM DIVERSIFIED INCOME FUND-CLASS	2,615.677	7.860	20,559.22	17,185.00	3,374.22	1,912.06	9.30
FUND #1822 CUSIP-746704501 PUTNAM FLOATING RATE INC FUND #1857 CUSIP-74676326	2,813.831	8.540	24,030 12	17,333.20	6,696.92	937.01	3.90
Total Mutual Funds			\$70,187.61	\$54,335.51	\$15,852.10	\$4,208.69	6.00%
Total Fixed Income			\$280,373.86	\$253,498.84	\$26,875.02	\$14,252.44	
Asser Description Equities	QUANTITY	Price	Market Value as of 12/31/09	Cost Basis	Unreauzed Gain/Loss	ESTIMATED ANNUAL INCOME	CURRENT
CONSUMER DISCRETIONARY			, , , , , , , , , , , , , , , , , , ,			•	,
FORTUNE BRANDS INC SYMBOL: FO CUSIP: 349631101	85.000	\$43.200	\$3,672 00	\$3,094.54	\$577.46	\$64 60	1.76%
KOHLS CORP SYMBOL. KSS CUSIP 500255104	80.000	53.930	4,314.40	3,772.57	541.83	0.00	0.00
TARGET CORP SYMBOL: TGT CUSIP: 87612E106	000 06	48.370	4,353.30	4,836 11	- 482.81	61.20	1.41
WALT DISNEY CO SYMBOL: DIS CUSIP: 254687106	130,000	32.250	4,192 50	3,080.67	1,111.83	45.50	1.08
Total Consumer Discretionary			\$16,532.20	\$14,783.89	\$1,748.31	\$171.30	1.04%

10 of 91



Period Covered: January 1, 2009 - December 31, 2009

WELLS FARGO

Asset Description	Опантт	Price	MARKET VALUE AS OF 12/31/09	Cost Basis	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	CURRENT YIELD
Equities (continued)							
CONSUMER STAPLES							
CVS/CAREMARK CORPORATION SYMBOL: CVS CUSIP: 126650100	70.000	\$32.210	\$2,254.70	\$2,037.42	\$217.28	\$21.35	0.95%
DIAGEO PLC - ADR SPONSORED ADR SYMBOL: DEO CUSIP: 25243Q205	85.000	69.410	5,899.85	6,063.80	- 163.95	192.53	3.26
NESTLE S.A. REGISTERED SHARES - ADR SPONSORED ADR SYMBOL: NSRGY CUSIP: 641069406	110.000	48.350	5,318.50	4,721.20	597.30	88.44	1.66
PEPSICO INC SYMBOL: PEP CUSIP: 713448108	75.000	60.800	4,560 00	5,327.25	- 767.25	135 00	2.96
PROCTER & GAMBLE CO SYMBOL: PG CUSIP: 742718109	55.000	60.630	3,334.65	3,824.55	- 489 90	96.80	2.90
Total Consumer Staples			\$21,367.70	\$21,974.22	- \$606.52	\$534.12	2.50%
ENERGY							
BAKER HUGHES INC COM SYMBOL: BHI CUSIP: 057224107	115.000	\$40.480	\$4,655.20	\$4,205.14	\$450.06	\$69.00	1.48%
CHEVRON CORP SYMBOL: CVX CUSIP: 166764100	70.000	76.990	5,389.30	5,904.50	-51520	190.40	3.53
EXXON MOBIL CORPORATION SYMBOL; XOM CUSIP: 30231G102	000:09	68.190	4,091.40	5,201.83	- 1,110.43	100.80	2.46
POWERSHARES WILDER HILL CLEAN ENERGY PORTFOLIO SYMBOL: PBW CUSIP: 73935X500	1,200.000	11.000	13,200.00	9,095.28	4,104.72	0.00	0.00
SCHLUMBERGER LTD SYMBOL: SLB CUSIP: 806857108	70.000	65.090	4,556.30	3,933.64	622.66	58.80	1.29
TRANSOCEAN LTD. SYMBOL: RIG CUSIP: H8817H100	85.000	82.800	7,038.00	4,191.85	2,846.15	0.00	0.00
XTO ENERGY INC SYMBOL: XTO CUSIP: 98385X106	130.000	46.530	6,048.90	5,464.51	584.39	65.00	1.07
Total Energy			\$44,979.10	\$37,996.75	\$6,982.35	\$484.00	1.08%
							11 of 91



Account Statement For:
ANDERSEN FAMILY FOUNDATION, INC-IMA

ASSET DETAIL (continued)

Asser Description Equities (continued)	QUANTITY	PRICE	MARKET VALUE AS OF 12/31/09	Cost Basis	Unrealized Gain/Loss	ESTIMATED ANNUAL INCOME	CURRENT YIELD
FINANCIALS							
BERKSHIRE HATHAWAY INC DEL CL B SYMBOL: BRK.B CUSIP: 084670207	2.000	\$3,286.000	\$6,572.00	\$6,831.95	- \$259.95	\$0.00	%00.0
GOLDMAN SACHS GROUP INC SYMBOL: GS CUSIP: 38141G104	00009	168.840	10,130.40	8,697.00	1,433.40	84.00	0.83
JPMORGAN CHASE & CO SYMBOL: JPM CUSIP: 46625H100	230.000	41.670	9,584.10	8,346.36	1,237.74	46.00	0.48
Total Financials			\$26,286.50	\$23,875.31	\$2,411.19	\$130.00	0.49%
HEALTH CARE							
ABBOTT LABS SYMBOL: ABT CUSIP: 002824100	65.000	\$53.990	\$3,509.35	\$3,610.57	- \$101.22	\$104.00	2.96%
BARD C R INC SYMBOL: BCR CUSIP: 067383109	70.000	77.900	5,453.00	6,946.80	- 1,493.80	47.60	0.87
BRISTOL MYERS SQUIBB CO SYMBOL: BMY CUSIP: 110122108	235.000	25.250	5,933.75	5,249.28	684.47	300.80	5.07
GILEAD SCIENCES INC SYMBOL: GILD CUSIP: 375558103	85 000	43.270	3,677.95	4,199 00	- 521.05	0.00	0.00
JOHNSON & JOHNSON SYMBOL: JNJ CUSIP: 478160104	80.000	64.410	5,152 80	5,190.40	-37.60	156.80	3.04
MEDCO HEALTH SOLUTIONS INC SYMBOL: MHS CUSIP: 58405U102	100.000	63 910	6,391 00	5,442.32	948 68	00 0	000
MEDTRONIC INC SYMBOL: MDT CUSIP: 585055106	115.000	43.980	5,057.70	5,572.90	- 515 20	94.30	1.86
SCHEIN HENRY INC SYMBOL: HSIC CUSIP: 806407102	65.000	52.600	3,419.00	2,830.32	588.68	0.00	0.00
TEVA PHARMACEUTICAL INDUSTRIES - ADR SPONSORED ADR SYMBOL: TEVA CUSIP: 881624209	55.000	56.180	3,089.90	2,906.90	183.00	26.51	0.86
Total Health Care			\$41,684.45	\$41,948.49	- \$264.04	\$730.01	1.75%

12 of 91

Account Statement For: ANDERSEN FAMILY FOUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

Asset Description	QUANTITY	PRICE	MARKET VALUE AS OF 12/31/09	Cost Basis	Unrealized Gain/Loss	ESTIMATED ANNUAL ÎNCOME	CURRENT YIELD
Equities (continued)							
INDUSTRIALS COOPER INDISTRIES BLC NEW IRELAND	150 000	\$42,640	\$6.396.00	\$5 919 00	\$477.00	\$150.00	2 34%
SYMBOL: CBE CUSIP: G24140108		2			2)))	2
DANAHER CORP SYMBOL: DHR CUSIP: 235851102	20.000	75.200	3,760.00	3,638.72	121.28	8.00	0.21
FIRST SOLAR INC SYMBOL: FSLR CUSIP: 336433107	35.000	135.400	4,739 00	5,461.25	- 722.25	0.00	0.00
GENERAL ELECTRIC CO SYMBOL; GE CUSIP: 369604103	200.000	15.130	3,026.00	2,587.80	438.20	80.00	2.64
HARSCO CORP SYMBOL: HSC CUSIP: 415864107	155.000	32.230	4,995.65	4,030.72	964.93	127.10	2.54
Total Industrials			\$22,916.65	\$21,637.49	\$1,279.16	\$365.10	1.59%
INFORMATION TECHNOLOGY							
ACCENTURE PLC SYMBOL: ACN CUSIP: G1151C101	000.06	\$41.500	\$3,735.00	\$2,881.98	\$853.02	\$67.50	1.81%
APPLE INC SYMBOL: AAPL CUSIP: 037833100	40.000	210.732	8,429.28	4,833.20	3,596.08	0.00	000
CISCO SYSTEMS INC SYMBOL: CSCO CUSIP: 17275R102	305.000	23 940	7,301.70	7,792.75	- 491.05	0.00	0.00
CITRIX SYS INC COM SYMBOL: CTXS CUSIP: 177376100	140.000	41.610	5,825.40	4,538.80	1,286.60	000	0.00
GOOGLE INC	12.000	619.980	7,439.76	4,201.56	3,238.20	0.00	0.00
SYMBOL: GOOG CUSIP: 38259P508 HEWLETT PACKARD CO SYMBOL: HPQ CUSIP: 428236103	75.000	51.510	3,863.25	3,474.52	388.73	24.00	0.62



Account Statement For: ANDERSEN FAMILY FOUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

Asset Description	QUANTITY	Paice	MARKET VALUE AS OF 12/31/09	Cost Basis	Unrealized Gain/Loss	ESTIMATED ANNUAL INCOME	CURRENT YIELD
Equities (continued)							
INFORMATION TECHNOLOGY (continued)							
INTERNATIONAL BUSINESS MACHS CORP	55.000	130.900	7,199.50	6,557.90	641.60	121.00	1.68
SYMBOL: IBM CUSIP: 459200101							
MARVELL TECHNOLOGY GROUP SYMBOL: MRVL CUSIP: G5876H105	250.000	20.750	5,187.50	3,803.43	1,384.07	0.00	0.00
QUALCOMM INC SYMBOL: QCOM CUSIP: 747525103	110.000	46.260	5,088.60	5,391.09	- 302.49	74.80	1.47
VISA INC-CLASS A SHRS SYMBOL: V CUSIP: 92826C839	95.000	87.460	8,308.70	4,194.31	4,114.39	47.50	0.57
Total Information Technology			\$62,378.69	\$47,669.54	\$14,709.15	\$334.80	0.54%
MATERIALS							
ECOLAB INC SYMBOL: ECL CUSIP: 278865100	40.000	\$44 580	\$1,783.20	\$1,814.06	- \$30.86	\$24.80	1.39%
MONSANTO CO NEW SYMBOL: MON CUSIP. 61166W101	90.006	81.750	7,357.50	8,726.85	- 1,369.35	95.40	1.30
POTASH CORP SASK SYMBOL: POT CUSIP: 73755L107	35.000	108.500	3,797.50	4,012.53	- 215.03	14.00	0.37
Total Materials			\$12,938.20	\$14,553.44	- \$1,615.24	\$134.20	1.04%
UTILITIES							
EXELON CORPORATION SYMBOL: EXC CUSIP: 30161N101	130.000	\$48.870	\$6,353.10	\$9,779.81	- \$3,426.71	\$273.00	4 30%
Total Utilities			\$6,353.10	\$9,779.81	-\$3,426.71	\$273.00	4.30%



Account Statement For: ANDERSEN FAMILY FOUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

Asser Description Equities (continued)	QUANTITY	Price	Markey Value as of 12/31/09	Cost Basis	Unrealized Gain/Loss	ESTIMATED ANNUAL INCOME	CURRENT YIELD
MUTUAL FUNDS ISHARES INC MSCLCDA INDEX FD SYMBOL: FWC CLSIP: 4642/86509	846.000	\$26 330	\$22,275.18	\$18,731.54	\$3,543.64	\$279.18	1.25%
ISHARES MSCI AUSTRALIA INDEX SYMBOL: EWA CUSIP: 464286103	1,110.000	22.840	25,352.40	18,693.29	6,659.11	1,366.41	5 39
ISHARES MSCI BRAZIL SYMBOL: EWZ CUSIP: 464286400	275.000	74.610	20,517.75	17,100.13	3,417.62	61.05	0:30
ISHARES MSCI EAFE SYMBOL: EFA CUSIP: 464287465	800.000	55.280	44,224 00	30,478.72	13,745.28	1,152.80	261
ISHARES TR S & P MIDCAP 400 INDEX FD SYMBOL: UH CUSIP: 464287507	940.000	72.410	68,065.40	70,279.41	- 2,214.01	1,265.24	1.86
ISHARES TR SMALLCAP 600 INDEX FD SYMBOL: UR CUSIP: 464287804	1,330.000	54.720	72,777.60	73,385.40	- 607.80	901.74	1.24
ISHARES TRFTSE XINHAU HK CHINA 25 SYMBOL: FXI CUSIP: 464287184	310.000	42.260	13,100.60	12,191.99	908.61	137.64	1.05
T ROWE PRICE EMERGING MARKETS STOCK FUND SYMBOL: PRMSX CUSIP: 77956H864	2,466.591	30.090	74,219.72	53,148.36	21,071.36	369.99	0 50
Total Mutual Funds			\$340,532.65	\$294,008.84	\$46,523.81	\$5,534.05	1.63%
Total Equities			\$595,969.24	\$528,227.78	\$67,741.46	\$8,690.58	1.46%



Account Statement For: ANDERSEN FAMILY FOUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

Asser Description Alternative Investments	Qианпт	PRICE	MARKET VALUE AS OF 12/31/09	Cost Basis	Unrealized Gain/Loss	ESTIMATED ANNUAL INCOME	CURRENT YIELD
ОТНЕЯ							
DIAMOND HILL LONG-SHORT FUND CLASS I SYMBOL: DHLSX CUSIP: 252645833	1,922.474	\$16.420	\$31,567.02	\$36,469.33	- \$4,902.31	\$409.49	1.30%
GATEWAY FUND CLASS A #1984 SYMBOL: GATEX CUSIP: 367829207	1,750.136	25.250	44,190.93	49,038.82	- 4,847.89	827.81	1.87
HUSSMAN STRATEGIC GROWTH FUND #601 SYMBOL: HSGFX CUSIP: 448108100	3,154.777	12.780	40,318.05	49,309.16	- 8,991.11	78.87	0.20
POWERSHARES DB COMMODITY INDEX SYMBOL: DBC CUSIP: 739355105	2,875.000	24.620	70,782.50	61,061.26	9,721.24	0.00	0.00
Total Other			\$186,858.50	\$195,878.57	- \$9,020.07	\$1,316.17	0.70%
Total Alternative Investments			\$186,858.50	\$195,878.57	- \$9,020.07	\$1,316.17	0.70%



Account Statement For: ANDERSEN FAMILY FOUNDATION, INC-IMA

Period Covered: January 1, 2009 - December 31, 2009

Asset Description	Qианпт	PRICE	MARKET VALUE AS OF 12/31/09	Cost Basis	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	CURRENT YIELD
Real Estate & Specialty Assets							
REAL ESTATE FUNDS							
CB RICHARD ELLIS REALTY TRUST	6,521.739	\$10.000	\$65,217.39	\$60,000.00	\$5,217.39	\$3,750.00	5.75%
EII INTERNATIONAL PROPERTY-1#30 SYMBOL: EIIPX CUSIP: 26852M105	1,096.491	15.710	17,225.87	20,000.00	- 2,774.13	269.74	1.57
ISHARES TR COHEN & STEERS REALTY MAJORS INDEX FUND SYMBOL: ICF CUSIP: 464287564	240.000	52.520	12,604.80	19,986.60	- 7,381.80	464.64	3.69
Total Real Estate Funds			\$95,048.06	\$99,986.60	- \$4,938.54	\$4,484.38	4.72%
Total Real Estate & Specialty Assets			\$95,048.06	\$99,986.60	- \$4,938.54	\$4,484.38	4.72%