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Form **990-PF**

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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning 01-01-2009, and ending 12-31-2009

G Check all that apply Initial return Initial return of a former public charity Final return
 Amended return Address change Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation PATRICK P LEE FOUNDATION CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP		A Employer identification number 20-3180304
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) (716) 844-3100
	City or town, state, and ZIP code AMHERST, NY 14228		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/>

H Check type of organization Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$** 25,218,780

J Accounting method Cash Accrual
 Other (specify) _____
(Part I, column (d) must be on cash basis.)

E If private foundation status was terminated under section 507(b)(1)(A), check here
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	1,627,235			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	83,073	82,169		
4 Dividends and interest from securities	159,481	159,481		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-1,469,427			
b Gross sales price for all assets on line 6a 10,240,729				
7 Capital gain net income (from Part IV, line 2)		0		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	4,548	0		
12 Total. Add lines 1 through 11	404,910	241,650		
13 Compensation of officers, directors, trustees, etc	120,000	0		120,000
14 Other employee salaries and wages	34,339	0		34,339
15 Pension plans, employee benefits	3,385	3,385		0
16a Legal fees (attach schedule)	266	266		0
b Accounting fees (attach schedule)	11,053	0		11,053
c Other professional fees (attach schedule)	34,569	34,569		0
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)	973	973		0
19 Depreciation (attach schedule) and depletion	5,012	0		
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	36,237	29,240		6,997
24 Total operating and administrative expenses. Add lines 13 through 23	245,834	68,433		172,389
25 Contributions, gifts, grants paid	1,304,859			1,304,859
26 Total expenses and disbursements. Add lines 24 and 25	1,550,693	68,433		1,477,248
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-1,145,783			
b Net investment income (if negative, enter -0-)		173,217		
c Adjusted net income (if negative, enter -0-)				

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

Part II Balance Sheets		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	71,314	10,556	10,556
	2 Savings and temporary cash investments	2,610,591	814,507	814,507
	3 Accounts receivable <input type="checkbox"/> <u>1,643,633</u>			
	Less allowance for doubtful accounts <input type="checkbox"/> _____	1,660,555	1,643,633	1,643,633
	4 Pledges receivable <input type="checkbox"/> _____			
	Less allowance for doubtful accounts <input type="checkbox"/> _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)		7,783	7,783
	7 Other notes and loans receivable (attach schedule) <input type="checkbox"/> _____			
	Less allowance for doubtful accounts <input type="checkbox"/> _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	4,873		
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis <input type="checkbox"/> _____			
Less accumulated depreciation (attach schedule) <input type="checkbox"/> _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	19,852,299 <input checked="" type="checkbox"/>	22,703,527	22,703,527	
14 Land, buildings, and equipment basis <input type="checkbox"/> <u>45,978</u>				
Less accumulated depreciation (attach schedule) <input type="checkbox"/> <u>7,204</u>	39,399 <input checked="" type="checkbox"/>	38,774	38,774	
15 Other assets (describe <input type="checkbox"/> _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	24,239,031	25,218,780	25,218,780	
Liabilities	17 Accounts payable and accrued expenses		24,123	
	18 Grants payable		1,165,000	
	19 Deferred revenue	1,660,555	16,675	
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe <input type="checkbox"/> _____)			
23 Total liabilities (add lines 17 through 22)	1,660,555	1,205,798		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	256,653	256,653	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	22,321,823	23,756,329	
30 Total net assets or fund balances (see page 17 of the instructions)	22,578,476	24,012,982		
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	24,239,031	25,218,780		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	22,578,476
2	Enter amount from Part I, line 27a	2	-1,145,783
3	Other increases not included in line 2 (itemize) <input type="checkbox"/> _____	3	5,148,001
4	Add lines 1, 2, and 3	4	26,580,694
5	Decreases not included in line 2 (itemize) <input type="checkbox"/> _____	5	2,567,712
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	24,012,982

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a	See Additional Data Table			
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a	See Additional Data Table			
b				
c				
d				
e				
2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-1,469,427
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	527,955	31,383,779	0 016823
2007	199,205	10,473,861	0 019019
2006	0	25,485	0 0
2005	4,147	3,694	1 122631
2004			
2	Total of line 1, column (d).		2 1 158473
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years		3 0 289618
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.		4 23,660,973
5	Multiply line 4 by line 3.		5 6,852,644
6	Enter 1% of net investment income (1% of Part I, line 27b).		6 1,732
7	Add lines 5 and 6.		7 6,854,376
8	Enter qualifying distributions from Part XII, line 4.		8 1,477,248

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

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

Table with 11 rows for excise tax calculations. Includes sub-rows 6a-6d for credits and payments. Total tax due is 0, overpayment is 6,598.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, Yes, and No. Questions cover political activities, unrelated business income, and state reporting.

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ patrickpleefoundation.org	13	Yes	
14	The books are in care of ▶ CHIAMPPOU TRAVIS BESA W KERSHNER L Telephone no ▶ (716) 630-2400 Located at ▶ 45 BRYANT WOODS NORTH AMHERST NY ZIP+4 ▶ 14228			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 <input type="checkbox"/>			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <input checked="" type="checkbox"/>	1b		No
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? <input type="checkbox"/>	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>) <input type="checkbox"/>	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions). . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b	
	6b	No
	7b	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000. 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.	0	

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	0
2	
All other program-related investments. See page 24 of the instructions	
3	0
Total. Add lines 1 through 3.	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	7,560,752
b	Average of monthly cash balances.	1b	1,040,082
c	Fair market value of all other assets (see page 24 of the instructions).	1c	15,420,458
d	Total (add lines 1a, b, and c).	1d	24,021,292
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	24,021,292
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	360,319
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	23,660,973
6	Minimum investment return. Enter 5% of line 5.	6	1,183,049

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,183,049
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	3,464
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,464
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,179,585
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,179,585
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,179,585

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,477,248
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,477,248
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,477,248

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,179,585
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only.			1,327,247	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004.				
b From 2005.				
c From 2006.				
d From 2007.				
e From 2008.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ <u>1,477,248</u>				
a Applied to 2008, but not more than line 2a			1,327,247	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions).	0			
d Applied to 2009 distributable amount.				150,001
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				1,029,584
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2005.				
b Excess from 2006.				
c Excess from 2007.				
d Excess from 2008.				
e Excess from 2009.				

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

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

b Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1 Information Regarding Foundation Managers:

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

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

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

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

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

PATRICK P LEE FOUNDATION
 45 BRYANT WOODS NORTH
 AMHERST, NY 14228
 (716) 630-2400

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

THE APPLICATION PROCESS IS BEGUN BY INITIATING A "LETTER OF INTENT" ELECTRONIC FORM WHICH DEFINES THE SCOPE AND GENERAL GUIDELINES AND AREAS OF THE PROPOSED PROJECT. IF THE PROJECT FALLS WITHIN GUIDELINES AND AREAS OF INTEREST, SUBMISSION OF AN ONLINE GRANT APPLICATION WILL BE REQUESTED

c Any submission deadlines

FINAL DECISIONS ON GRANT AWARDS ARE MADE IN APRIL AND OCTOBER

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

GRANTS ARE MADE ONLY TO TAX-EXEMPT PUBLIC CHARITIES DEFINED IN SECTION 501 (C)(3) OF THE INTERNAL REVENUE CODE. GRANTS ARE NOT AWARDED FOR POLITICAL ACTIVITIES, DEFICIT FINANCING, INDIVIDUALS, CAPACITY BUILDING FUNDS, SCHOLARSHIPS, SEED FUNDS, OR PROGRAM-RELATED INVESTMENTS

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See Additional Data Table				
Total				▶ 3a 1,304,859

b Approved for future payment See Additional Data Table				
Total				▶ 3b 1,165,000

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

Schedule of Contributors

OMB No 1545-0047

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

2009

Department of the Treasury
Internal Revenue Service

Name of organization

PATRICK P LEE FOUNDATION
CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

Employer identification number

20-3180304

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

501(c)() (enter number) organization

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

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

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

501(c)(3) taxable private foundation

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

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

General Rule—

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

Special Rules

For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. . . . ▶ \$ _____

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

Name of organization PATRICK P LEE FOUNDATION CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP	Employer identification number 20-3180304
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Part I Contributors (see Instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	PATRICK P LEE C/O CTBK - 45 BRYANT WOODS NORTH AMHERST, NY 14228	\$ 1,627,235	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
—		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization PATRICK P LEE FOUNDATION CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP	Employer identification number 20-3180304
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Part II Noncash Property (see Instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____
—	_____ _____ _____	\$ _____	_____

Name of organization PATRICK P LEE FOUNDATION CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP	Employer identification number 20-3180304
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Part III **Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year.** (Complete columns (a) through (e) and the following line entry.)
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	

Additional Data

Software ID: 09000028

Software Version: 2009.04050

EIN: 20-3180304

Name: PATRICK P LEE FOUNDATION
CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
ALLIANCE BERNSTEIN - SEE ATTACHED			
FIDELITY A/C # 479-98739 - SEE ATTACHED			
ISHARES BARCLAYS 1-3 YEAR TREASURY BD		2009-07-24	2009-10-07
LOOMIS SAYLES	P		
LOOMIS SAYLES	P		
Capital Gains Dividends	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,009,980		2,957,699	52,281
7,148,454		8,723,404	-1,574,950
29,140		29,053	87
50,237			50,237
1,334			1,334
1,584			1,584

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			52,281
			-1,574,950
			87
			50,237
			1,334
			1,584

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PATRICK P LEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	CHAIRMAN 10 00	0	0	0
FREDERIC COOK 45 BRYANT WOODS NORTH AMHERST, NY 14228	EXECUTIVE DIRECTOR 25 00	120,000	0	0
ROBERT LANE 45 BRYANT WOODS NORTH AMHERST, NY 14228	SECRETARY 2 00	0	0	0
DAVID HORAN 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
CYNTHIA LEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
CHRISTOPHER LEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
MICHELLE LEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
JENNIFER MCNAMARA 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR/GRANT CHAIR 2 00	0	0	0
BARBARA RHEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
JOHN RHEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
PATRICK W LEE 45 BRYANT WOODS NORTH AMHERST, NY 14228	DIRECTOR 2 00	0	0	0
LEE WORTHAM 45 BRYANT WOODS NORTH AMHERST, NY 14228	INVESTMENT CHAIR 2 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ARLINGTON FREE CLINIC2921 11th STREET SOUTH ARLINGTON,VA 22204	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
BAPTIST HEALTH SOUTH FLORIDA FOUNDATION975 BAPTIST WAY HOMESTEAD,FL 33033	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
BISHOP O'CONNEL HIGH SCHOOL 2860 GENESE STREET BUFFALO, NY 14225	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,500
BISON SCHOLARSHIPPO BOX 1134 BUFFALO, NY 14205	NONE	PUBLIC CHARITY	GENERAL PURPOSE	30,000
BUFFALO PHILHARMONIC499 FRANKLIN ST BUFFALO, NY 14202	NONE	PUBLIC CHARITY	GENERAL PURPOSE	28,000
CAMP GOOD DAYS6430 TRANSIT ROAD DEPEW, NY 14043	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
CANISIUS HIGH SCHOOL2001 MAIN STREET BUFFALO, NY 14208	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
CMH COUNSELING153 WUTICA ST BUFFALO, NY 14205	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
CRISIS SERVICES2969 MAIN STREET BUFFALO, NY 14214	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
D'YOUVILLE COLLEGE320 PORTER AVENUE BUFFALO, NY 14201	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
DISABLED AMERICAN VETERANS AUX #1203354 DELAWARE AVE KENMORE, NY 14217	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,100
EATING DISORDER ASSOCIATION 70 BARKER ST BUFFALO, NY 14209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
FAMILY & CHILD SERVICES330 DELAWARE AVE BUFFALO, NY 14202	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
FELICIAN SISTERS130 KOSCIUSKO ST BUFFALO, NY 14212	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
FOOD BANK OF WNY91 HOLT ST BUFFALO, NY 14206	NONE	PUBLIC CHARITY	GENERAL PURPOSE	40,000
Total				1,304,859

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GREENWAY ARTS ALLIANCE544 N FAIRFAX AVE LOS ANGELES, CA 90036	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
HABITAT FOR HUMANITY501 AMHERST ST BUFFALO, NY 14207	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
HEALTH ASSOCIATION OF NIAGARA COUNTY INC1302 MAIN ST NIAGARA FALLS, NY 14301	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
HEALTHY COMMUNITY ALLIANCE 26 JAMESTOWN ST GOWANDA, NY 14070	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
HOPE FOR TOMORROW FOUNDATION811 MAPLE ROAD WILLIAMSVILLE, NY 14221	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
LAWRENCE D JACOBS MEMORIAL FOUNDATIONPO BOX 338 BUFFALO, NY 14205	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,500
LEAUKEMIA & LYMPHOMA SOCIETY 4053 MAPLE RD AMHERST, NY 14226	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,500
MARIA M LOVE CONVALESCENT FUNDPO BOX 293 BUFFALO, NY 14213	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,000
MEALS ON WHEELS100 JAMES E CASEY DR BUFFALO, NY 14206	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
MISSING & EXPLOITED CHILDREN'S FUND610 MAIN ST BUFFALO, NY 14202	NONE	PUBLIC CHARITY	GENERAL PURPOSE	910
NEW HOPE CORPS1020 N KROME AVE HOMESTEAD, FL 33030	NONE	PUBLIC CHARITY	GENERAL PURPOSE	66,849
NIAGARA HOSPICE4675 SUNSET DR LOCKPORT, NY 14094	NONE	PUBLIC CHARITY	GENERAL PURPOSE	30,000
NICHOLS SCHOOL1250 AMHERST STREET BUFFALO, NY 14216	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
OCEAN REEF FOUNDATION50 BARRACUDA LANE KEY LARGO, FL 33037	NONE	PUBLIC CHARITY	GENERAL PURPOSE	225,000
OCEAN REEF MEDICAL CENTER50 BARRACUDA LANE KEY LARGO, FL 33037	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
Total				1,304,859

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
OUR LADY OF VICTORY RENAISSANCE CORP291 NORTH ST BUFFALO, NY 14201	NONE	PUBLIC CHARITY	GENERAL PURPOSE	30,000
PEOPLE INC976 DELAWARE AVE BUFFALO, NY 14209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
POLISH ASSISTANCE FUND INC15 E 65TH ST NEW YORK, NY 10065	NONE	PUBLIC CHARITY	GENERAL PURPOSE	500
PROJECT LIFESAVER WNY67 MORRISON AVE TONAWANDA, NY 14150	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
ROSWELL PARK ALLIANCE FOUNDATIONELM AND CARLTON STREETS BUFFALO, NY 14263	NONE	PUBLIC CHARITY	GENERAL PURPOSE	274,000
SAMARITAN PASTORAL COUNSELING322 OLD FALLS BLVD NORTH TONAWANDA, NY 14120	NONE	PUBLIC CHARITY	GENERAL PURPOSE	15,000
SOUTH DADE CHILD CARE CENTER 28520 SW 148TH AVE HOMESTEAD, FL 33033	NONE	PUBLIC CHARITY	GENERAL PURPOSE	15,000
ST ADALBERTS RESPONSE TO LOVE130 KOSCIVSKO ST BUFFALO, NY 14212	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
ST JAMES SCHOOL21 DAVIDSON AVE BUFFALO, NY 14215	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,000
SUMMIT EDUCATIONAL RESOURCES INC150 STAHL RD GETZVILLE, NY 14068	NONE	PUBLIC CHARITY	GENERAL PURPOSE	25,000
THE AQUARIUM OF NIAGARA701 WHIRLPOOL ST NIAGARA FALLS, NY 14301	NONE	PUBLIC CHARITY	GENERAL PURPOSE	4,000
THE KEYS CHILDREN'S FOUNDATION73 HIGH POINT RD TAVERNIER, FL 33070	NONE	PUBLIC CHARITY	GENERAL PURPOSE	1,000
TRINITY LUTHERAN CHURCH1080 MAIN ST BUFFALO, NY 14209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
UNIVERSITY AT BUFFALO UNIVERSITY AT BUFFALO BUFFALO, NY 14260	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
WNY WOMEN'S FUND742 DELAWARE AVE BUFFALO, NY 14209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,500
Total				1,304,859

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WOMEN & CHILDREN'S HOSPITAL 219 BRYANT ST BUFFALO, NY 14222	NONE	PUBLIC CHARITY	GENERAL PURPOSE	500
Total				1,304,859

Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
b <i>Approved for future payment</i>				
BISON SCHOLARSHIPPO BOX 1134 BUFFALO, NY 14205	NONE	PUBLIC CHARITY	GENERAL PURPOSE	120,000
BUFFALO PHILHARMONIC499 FRANKLIN ST BUFFALO, NY 14202	NONE	PUBLIC CHARITY	GENERAL PURPOSE	175,000
CAMP GOOD DAYS6430 TRANSIT ROAD DEPEW, NY 14043	NONE	PUBLIC CHARITY	GENERAL PURPOSE	20,000
D'YOUVILLE COLLEGE320 PORTER AVENUE BUFFALO, NY 14201	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
FAMILY & CHILD SERVICES330 DELAWARE AVE BUFFALO, NY 14202	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
HABITAT FOR HUMANITY501 AMHERST ST BUFFALO, NY 14207	NONE	PUBLIC CHARITY	GENERAL PURPOSE	40,000
HEALTH ASSOCIATION1302 MAIN ST NIAGARA FALLS, NY 14301	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
HEALTHY COMMUNITY ALLIANCE26 JAMESTOWN ST GOWANDA, NY 14070	NONE	PUBLIC CHARITY	GENERAL PURPOSE	40,000
MEALS ON WHEELS100 JAMES E CASEY DR BUFFALO, NY 14206	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
NIAGARA HOSPICE4675 SUNSET DR LOCKPORT, NY 14094	NONE	PUBLIC CHARITY	GENERAL PURPOSE	120,000
OUR LADY OF VICTORY RENAISSANCE CORP291 NORTH ST BUFFALO, NY 14201	NONE	PUBLIC CHARITY	GENERAL PURPOSE	120,000
PEOPLE INC976 DELAWARE AVE BUFFALO, NY 14209	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
ST ADALBERTS130 KOSCIUSKO ST BUFFALO, NY 14212	NONE	PUBLIC CHARITY	GENERAL PURPOSE	80,000
UB SCHOOL OF ENGINEERING UNIVERSITY AT BUFFALO BUFFALO, NY 14260	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
Total				1,165,000

TY 2009 Accounting Fees Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	11,053	0		11,053

**TY 2009 All Other Program
Related Investments Schedule**

Name: PATRICK P LEE FOUNDATION
 CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP
EIN: 20-3180304

Category	Amount
NONE	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2009 Depreciation Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTER	2008-08-13	1,835	306	SL	3 000000000000	612	0		
OFFICE FURNITURE	2008-12-19	37,717	1,886	SL	10 000000000000	3,772	0		
COMPUTER	2009-10-14	1,550		SL	3 000000000000	129	0		
VIDEO EQUIPMENT	2009-01-20	1,490		SL	5 000000000000	273	0		
OFFICE FURNITURE	2009-01-27	2,113		SL	10 000000000000	194	0		
OFFICE FURNITURE	2009-09-21	1,272		SL	10 000000000000	32	0		

TY 2009 Investments - Other Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALLIANCE BERNSTEIN INTL VALUE ADVISOR	AT COST	3,215,548	3,215,548
FIDELITY INVESTMENTS	AT COST	2,776,616	2,776,616
INVESTMENT IN SUMMIT ROCK	AT COST	10,646,631	10,646,631
SUMMIT ROCK - SELECT EQUITY	AT COST	4,581,139	4,581,139
LOOMIS SAYLES INVESTMENTS	AT COST	1,354,992	1,354,992
BALANCE RESERVE INVESTMENTS	AT COST	128,601	128,601

TY 2009 Land, Etc. Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTER	1,835	918	917	0
OFFICE FURNITURE	37,717	5,658	32,059	0
COMPUTER	1,550	129	1,421	0
VIDEO EQUIPMENT	1,490	273	1,217	0
OFFICE FURNITURE	2,113	194	1,919	0
OFFICE FURNITURE	1,272	32	1,240	0

TY 2009 Legal Fees Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	266	266		0

TY 2009 Other Decreases Schedule**Name:** PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Description	Amount
IMC ESCROW RECEIVED	1,627,235
FUTURE CONTRIBUTIONS ADJUSTMENT	940,477

TY 2009 Other Expenses Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEMBERSHIP FEE	3,151	0		3,151
MEALS & ENTERTAINMENT	6,155	6,155		0
EQUIPMENT RENTAL & MAINTENANCE	1,625	1,625		0
MISCELLANEOUS EXPENSE	859	859		0
BOOKS,SUBSCRIPTION & REFERENCE	624	624		0
MARKETING MATERIALS	1,755	0		1,755
POSTAGE, MAILING SERVICE	2,091	0		2,091
PRINTING & COPYING	104	104		0
SUPPLIES	4,127	4,127		0
TELEPHONE-COMMUNICATIONS	6,323	6,323		0
CREDIT CARD	-438	-438		0
OTHER COSTS	32	32		0
TRANSACTION COSTS	30	30		0
ADVISOR FEES	548	548		0
BUSINESS REGISTRATION FEES	22	22		0
TRAVEL	8,686	8,686		0
LOOMIS K-1 DEDUCTIONS	543	543		0

TY 2009 Other Income Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
LOOMIS SAYLES OTHER INCOME	4,548	0	4,548

TY 2009 Other Increases Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	5,148,001

TY 2009 Other Professional Fees Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	31,854	31,854		0
OUTSIDE CONTRACT SERVICES	2,715	2,715		0

TY 2009 Substantial Contributors Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Name	Address
PATRICK P LEE	C/O CTBK- 45 BRYANT WOODS NORTH AMHERST, NY 14228

TY 2009 Taxes Schedule

Name: PATRICK P LEE FOUNDATION

CO CHIAMPOU TRAVIS BESAW & KERSHNER LLP

EIN: 20-3180304

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	973	973		0