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

2009

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.Otherwise,
print
or type.See Specific
Instructions.

Name of foundation

AUSHERMAN FAMILY FOUNDATION, INC.

Number and street (or P O box number if mail is not delivered to street address)

7420 HAYWARD ROAD

Room/suite

203

City or town, state, and ZIP code

FREDERICK, MD 21702

A Employer identification number

20-4937263

B Telephone number

301-620-4443

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test,
check here and attach computation ☐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 ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, col (c), line 16)

\$ 13,037,850. (Part I, column (d) must be on cash basis.)

J Accounting method: ☐ Cash ☒ Accrual☐ Other (specify) _____

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).)(a) Revenue and
expenses per books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable purposes
(cash basis only)

Revenue

1 Contributions, gifts, grants, etc., received

0.

N/A

2 Check ☒ if the foundation is not required to attach Sch B3 Interest on savings and temporary
cash investments

4 Dividends and interest from securities

373,570.

372,346.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

<467,612.>

b Gross sales price for all
assets on line 6a 7,400,210.

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)

11 Other income

<34,179.>

<34,179.>

STATEMENT 2

12 Total Add lines 1 through 11

<128,221.>

338,167.

Operating and Administrative Expenses

13 Compensation of officers, directors, trustees, etc

41,945.

0.

40,464.

14 Other employee salaries and wages

34,442.

0.

34,442.

15 Pension plans, employee benefits

16a Legal fees STMT 3

5,182.

0.

5,182.

b Accounting fees STMT 4

8,586.

0.

8,586.

c Other professional fees STMT 5

1,400.

0.

1,400.

17 Interest

18 Taxes STMT 6

9,103.

1,073.

8,030.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses STMT 7

94,927.

62,354.

32,487.

24 Total operating and administrative
expenses. Add lines 13 through 23

195,585.

63,427.

130,591.

25 Contributions, gifts, grants paid

22,001.

22,001.

26 Total expenses and disbursements.
Add lines 24 and 25

217,586.

63,427.

152,592.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

<345,807.>

b Net investment income (if negative, enter -0-)

274,740.

c Adjusted net income (if negative, enter -0-)

N/A

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	8,527.	2,564.	2,564.
	2 Savings and temporary cash investments	373,647.	902,306.	902,306.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶	1,154.		
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 8	13,150,173.	11,979,537.	12,132,980.
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	13,533,501.	12,884,407.	13,037,850.
	17 Accounts payable and accrued expenses	1,038.		
	18 Grants payable	2,604,511.	2,302,262.	
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	2,605,549.	2,302,262.	
	Foundations that follow SFAS 117, check here ▶ ☐			
	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	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	10,927,952.	10,582,145.	
	30 Total net assets or fund balances	10,927,952.	10,582,145.	
31 Total liabilities and net assets/fund balances		13,533,501.	12,884,407.	

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	10,927,952.
2 Enter amount from Part I, line 27a	2	<345,807.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	10,582,145.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	10,582,145.

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				
b SEE ATTACHED STATEMENT				
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				
b				
c				
d				
e 7,400,210.		7,867,822.	<467,612.>	
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) 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		
a				
b				
c				
d				
e			<467,612.>	
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 <467,612.>
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). If (loss), enter -0- in Part I, line 8		{ If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3 N/A

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 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	304,667.	12,867,532.	.023677
2007	3,085,141.	14,150,834.	.218018
2006	53,087.	855,377.	.062063
2005			
2004			

2 Total of line 1, column (d)	2 .303758
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 .101253
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4 11,602,533.
5 Multiply line 4 by line 3	5 1,174,791.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6 2,747.
7 Add lines 5 and 6	7 1,177,538.
8 Enter qualifying distributions from Part XII, line 4	8 152,592.

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.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)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% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2009 estimated tax payments and 2008 overpayment credited to 2009

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2010 estimated tax

14,934. Refunded

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If "Yes," attach a detailed description of the activities

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by General Instruction T

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

• By language in the governing instrument, or

• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

7 Did the foundation have at least \$5,000 in assets at any time during the year?

If "Yes," complete Part II, col. (c), and Part XV

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶

MD

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

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8b	X	
9		X
10		X

N/A

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 instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.AUSHERMANFAMILYFOUNDATION.ORG</u>	13	X	
14	The books are in care of ► <u>RENEE LOPEZ</u> Telephone no. ► <u>301-620-4464</u> Located at ► <u>7420 HAYWARD ROAD, SUITE 203, FREDERICK, MD</u> ZIP+4 ► <u>21702</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year		15	N/A

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
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 ► _____	☐ 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.)	N/A	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. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(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)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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 instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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.

(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 STATEMENT 9		41,945.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	11,362,034.
b	Average of monthly cash balances	1b	417,187.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	11,779,221.
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	11,779,221.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	176,688.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	11,602,533.
6	Minimum investment return. Enter 5% of line 5	6	580,127.

Part XI 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.)

1	Minimum investment return from Part X, line 6	1	580,127.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	5,495.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	5,495.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	574,632.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	574,632.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	574,632.

Part XII Qualifying Distributions (see 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	152,592.
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	152,592.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	152,592.

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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				574,632.
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	2,144,260.			
e From 2008				
f Total of lines 3a through e	2,144,260.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 152,592.				
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.			
d Applied to 2009 distributable amount				152,592.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	422,040.			422,040.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,722,220.			
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 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 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. Subtract lines 7 and 8 from line 6a	1,722,220.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007	1,722,220.			
d Excess from 2008				
e Excess from 2009				

N/A

▶

☐ 4942(j)(3) or ☐ 4942(j)(5)

(e) Total

(4) Gross investment income

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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
<i>a Paid during the year</i> FREDERICK CHURCH OF THE BRETHREN 201 FAIRVIEW AVENUE FREDERICK, MD 21701 FREDERICK COUNTY PUBLIC LIBRARIES 110 EAST PATRICK STREET FREDERICK, MD 21701	NONE NONE	PUBLIC CHARITY PUBLIC CHARITY	ANNUAL CONTRIBUTION ANNUAL CONTRIBUTION	21,600. 401.
Total			▶ 3a	22,001.
<i>b Approved for future payment</i> NONE				
Total			▶ 3b	0.

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|-----|----------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

[illegible]

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer or trustee _____ Date 11/8/10 Title Founder and Chairman

Preparer's signature	<i>James K. Dan</i>	Date	11/4/10	Check if self-employed ☐	Preparer's identifying number
----------------------	---------------------	------	---------	---	-------------------------------

Paid Prepare Use O	Firm's name (or yours if self-employed), address, and ZIP code	RSM MCGLADREY, INC. 5291 CORPORATE DR., #100 FREDERICK, MD 21703	EIN ►
			Phone no. 301-712-9600

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	PNC ACCT #8745 SHORT-TERM SALES	P	VARIOUS	VARIOUS
b	PNC ACCT #8745 LONG-TERM SALES	P	VARIOUS	VARIOUS
c	PNC ACCT #4296 LONG-TERM SALES	P	VARIOUS	VARIOUS
d	PNC ACCT #4301 LONG-TERM SALES	P	VARIOUS	VARIOUS
e	PNC ACCT #4393 LONG-TERM SALES	P	VARIOUS	VARIOUS
f	PNC ACCT #4408 LONG-TERM SALES	P	VARIOUS	VARIOUS
g	PNC ACCT #4416 LONG-TERM SALES	P	VARIOUS	VARIOUS
h	PNC ACCT #9223 SHORT-TERM SALES	P	VARIOUS	VARIOUS
i	MSSB ACCT #23602-15 SHORT-TERM SALES	P	VARIOUS	VARIOUS
j	MSSB ACCT #23602-15 LONG-TERM SALES	P	VARIOUS	VARIOUS
k	CAPITAL GAINS DIVIDENDS			
l				
m				
n				
o				

(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 2,140,517.		1,673,283.	467,234.
b 4,064,526.		4,505,249.	<440,723.>
c 120,758.		175,076.	<54,318.>
d 72,012.		89,338.	<17,326.>
e 262,273.		442,813.	<180,540.>
f 109,483.		202,600.	<93,117.>
g 244,963.		361,717.	<116,754.>
h 25,000.		25,000.	0.
i 225,000.		222,092.	2,908.
j 135,675.		170,654.	<34,979.>
k 3.			3.
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			467,234.
b			<440,723.>
c			<54,318.>
d			<17,326.>
e			<180,540.>
f			<93,117.>
g			<116,754.>
h			0.
i			2,908.
j			<34,979.>
k			3.
l			
m			
n			
o			

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	<467,612.>
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

AUSHERMAN FAMILY FOUNDATION, INC.
FEIN: 20-4937263
DECEMBER 31, 2009

THE FOLLOWING IS ATTACHED FOR SET-ASIDES FOR THE PRIOR TAX YEAR, DECEMBER 31, 2007:

THE PURPOSE OF THE PROJECT IS TO BUILD A COMMUNITY YOUTH CENTER WHICH WILL BE OWNED AND OPERATED BY FREDERICK ALLIANCE FOR YOUTH, A 501(C)(3) ORGANIZATION. THE FOLLOWING AMOUNTS AND PURPOSES ARE A PART OF THE SET-ASIDE:

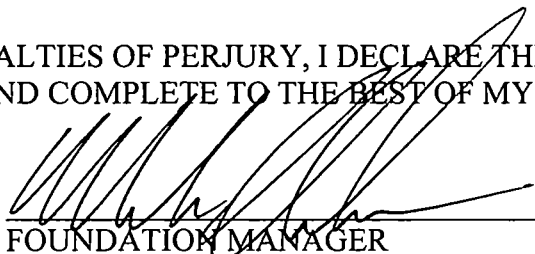
THE SUM OF \$2,800,000 TO BUILD A YOUTH CENTER. THE ORIGINAL TRUSTEE APPROVAL OF 10/07 WAS BROKEN DOWN AS FOLLOWS:

- \$1.0 M FOR START UP COSTS: ADMINISTRATIVE, ENGINEERING, ARCHITECT
- \$1.475 M FOR CAPITAL COST (COMMITMENT IS FOR 25% OF CAPITAL COST)
- \$125,000 FOR FURNITURE AND EQUIPMENT (COMMITMENT IS FOR 25% OF COST)
- \$200,000 FOR OPERATING SUBSIDY THE FIRST 2 YEARS.

I, MARVIN E. AUSHERMAN, AS FOUNDATION MANAGER, STATE THAT THE AMOUNT OF THE SET ASIDE WILL BE EXPENDED WITHIN THE 60 MONTHS AFTER THE DATE THE AMOUNTS ABOVE HAVE BEEN SET-ASIDE; THE PROJECT WILL NOT BE COMPLETED BY THE END OF THE FOUNDATION'S TAX YEAR ENDED DECEMBER 31, 2009 AND AT DECEMBER 31, 2009, \$497,738 OF THE SET-ASIDE HAS BEEN EXPENDED.

UNDER PENALTIES OF PERJURY, I DECLARE THE ABOVE TO BE TRUE, CORRECT AND COMPLETE TO THE BEST OF MY KNOWLEDGE AND BELIEF.

SIGNED:


FOUNDATION MANAGER

2009 Tax Information Statement

Account Number: 45460017758745
 Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Recipent's Tax ID number: XX-XX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315
☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS as Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax
								Withheld
(Box 5)	(Box 1b)	(Box 7)	(Box 1a)		(Box 2)		(Box 4)	
Short Term Sales Reported on 1099-B								
112.0000	008073108	AEROVIRONMENT INC	04/30/2009	12/22/2009	3,246.12	2,573.42	672.70	0.00
69.0000	008073108	AEROVIRONMENT INC	10/16/2009	12/22/2009	1,999.84	1,967.19	32.65	0.00
42.0000	008073108	AEROVIRONMENT INC	05/19/2009	12/22/2009	1,217.30	1,148.70	68.60	0.00
62.0000	008252108	AFFILIATED MANAGERS GROUP INC	11/26/2008	03/31/2009	2,577.14	1,742.14	835.00	0.00
297.0000	00846U101	AGILENT TECHNOLOGIES INC	10/14/2009	12/18/2009	8,788.30	8,196.67	591.63	0.00
227.0000	00971T101	AKAMAI TECHNOLOGIES	08/28/2009	12/22/2009	5,772.68	4,089.09	1,683.59	0.00
143.0000	00971T101	AKAMAI TECHNOLOGIES	10/16/2009	12/22/2009	3,636.54	3,117.19	519.35	0.00
183.0000	00971T101	AKAMAI TECHNOLOGIES	09/24/2009	12/22/2009	4,653.75	3,465.54	1,188.21	0.00
45.0000	018581108	ALLIANCE DATA SYSTEMS CORP	VARIOUS	08/21/2009	2,544.89	1,884.21	660.68	0.00
13.0000	018581108	ALLIANCE DATA SYSTEMS CORP	02/12/2009	12/22/2009	841.36	485.29	356.07	0.00
22.0000	018581108	ALLIANCE DATA SYSTEMS CORP	05/19/2009	12/22/2009	1,423.85	911.46	512.39	0.00
71.0000	018581108	ALLIANCE DATA SYSTEMS CORP	03/05/2009	12/22/2009	4,595.14	1,849.99	2,745.15	0.00
85.0000	02076X102	ALPHA NATURAL RESOURCES INC	VARIOUS	04/16/2009	1,465.56	1,838.25	372.69	0.00
70.0000	023436108	AMEDISYS INC	VARIOUS	09/15/2009	2,746.74	2,619.22	127.52	0.00
40.0000	023436108	AMEDISYS INC	09/03/2009	12/18/2009	1,775.95	1,327.10	448.85	0.00
30.0000	023436108	AMEDISYS INC	12/18/2009	12/18/2009	1,331.97	1,347.60	-15.63	0.00

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2009 Tax Information Statement

Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

☐ Corrected ☐ 2nd TIN notice

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date (Box 1a)		Date of Sale (Box 2)		Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
			Acquired	Sale	Stocks	Bonds, etc.			
119.0000	025334103	AMERICAN DAIRY INC	VARIOUS	10/22/2009	3,510.03		3,759.66	-249.63	0.00
731.0000	025816109	AMERICAN EXPRESS CO	10/14/2009	12/18/2009	29,546.99		25,408.90	4,138.09	0.00
115.0000	02744M108	AMERICAN MEDICAL SYS HLDGS	06/12/2009	07/30/2009	1,703.76		1,879.84	-176.08	0.00
15.0000	02913V103	AMERICAN PUBLIC EDUCATION	02/12/2009	04/06/2009	689.48		614.94	74.54	0.00
152.0000	03076C106	AMERIPRISE FINANCIAL INC-W/I	10/14/2009	12/18/2009	5,792.92		5,646.25	146.67	0.00
40.0000	030710107	AMERON INTERNATIONAL CORPORATION	12/15/2008	01/29/2009	2,072.22		2,330.00	-257.78	0.00
474.0000	032346108	AMYLIN PHARMACEUTICALS INC	10/08/2009	12/22/2009	7,295.10		6,466.12	828.98	0.00
255.0000	032346108	AMYLIN PHARMACEUTICALS INC	10/16/2009	12/22/2009	3,924.58		3,569.75	354.83	0.00
27.0000	03662Q105	ANSYS INC	11/26/2008	01/09/2009	700.80		802.95	-102.15	0.00
66.0000	03662Q105	ANSYS INC	11/26/2008	08/21/2009	2,357.46		1,962.78	394.68	0.00
73.0000	03662Q105	ANSYS INC	10/16/2009	12/22/2009	3,133.91		3,074.76	59.15	0.00
65.0000	03662Q105	ANSYS INC	05/19/2009	12/22/2009	2,790.47		1,846.65	943.82	0.00
4.0000	Y0486S104	AVAGO TECHNOLOGIES LTD SEDOL B3WS2X9	10/16/2009	12/22/2009	65.87		65.64	0.23	0.00
2.0000	056752108	BAIDU INC	11/26/2008	04/30/2009	464.08		286.60	177.48	0.00
6.0000	056752108	BAIDU INC	05/19/2009	07/22/2009	1,938.91		1,486.62	452.29	0.00
3.0000	056752108	BAIDU INC	05/19/2009	07/24/2009	1,080.02		743.31	336.71	0.00
7.0000	056752108	BAIDU INC	VARIOUS	07/29/2009	2,412.98		1,420.98	992.00	0.00
5.0000	056752108	BAIDU INC	11/26/2008	08/28/2009	1,701.30		716.50	984.80	0.00

2009 Tax Information Statement

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Recipient's Tax ID number: XX-XXX7263

Payer's Federal ID number: 22-1146430

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☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address

PNC BANK, N.A.
620 LIBERTY AVENUE-10TH FLOOR
PITTSBURGH, PA 15222-2705

Recipient's Name and Address

AUSHERMAN FAMILY FOUNDATION
7420 HAYWARD ROAD SUITE 203
FREDERICK, MD 21702-2509

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date (Box 1a)		Date of Sale (Box 2)		Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
			Acquired	Sale	Acquired	Sale				
9.0000	056752108	BAIDU INC	10/16/2009	10/26/2009			3,875.39	3,601.80	273.59	0.00
5.0000	056752108	BAIDU INC	10/16/2009	11/17/2009			2,201.94	2,001.00	200.94	0.00
2.0000	056752108	BAIDU INC	12/31/2008	12/22/2009			793.76	263.33	530.43	0.00
1.0000	056752108	BAIDU INC	10/16/2009	12/22/2009			396.88	400.20	-3.32	0.00
30.0000	05874B107	BALLY TECHNOLOGIES INC	06/12/2009	09/03/2009			1,174.92	811.20	363.72	0.00
40.0000	05874B107	BALLY TECHNOLOGIES INC	VARIOUS	09/18/2009			1,512.13	1,058.03	454.10	0.00
90.0000	05874B107	BALLY TECHNOLOGIES INC	VARIOUS	12/18/2009			3,736.84	3,819.95	-83.11	0.00
35.0000	05874B107	BALLY TECHNOLOGIES INC	10/15/2009	12/18/2009			1,453.21	1,505.70	-52.49	0.00
24.0000	06646V108	BANKRATE INC	11/26/2008	01/07/2009			821.63	689.52	132.11	0.00
23.0000	06646V108	BANKRATE INC	11/26/2008	02/04/2009			692.87	660.79	32.08	0.00
83.0000	06646V108	BANKRATE INC	11/26/2008	02/06/2009			2,356.52	2,384.59	-28.07	0.00
15.0000	075887109	BECTON DICKINSON & CO	06/08/2009	12/18/2009			1,114.32	1,004.75	109.57	0.00
84.0000	075887109	BECTON DICKINSON & CO	10/14/2009	12/18/2009			6,240.20	5,759.88	480.32	0.00
90.0000	075896100	BED BATH BEYOND INC	10/14/2009	12/18/2009			3,369.65	3,329.10	40.55	0.00
155.0000	075896100	BED BATH BEYOND INC	10/26/2009	12/18/2009			5,803.28	5,618.39	184.89	0.00
85.0000	09180C106	BJ'S RESTAURANTS, INC	03/06/2009	12/18/2009			1,612.40	908.06	704.34	0.00
25.0000	093671105	BLOCK H & R INC	11/26/2008	04/01/2009			447.77	470.25	-22.48	0.00
116.0000	111320107	BROADCOM CORP	12/15/2008	03/04/2009			1,932.86	2,013.08	-80.22	0.00
30.0000	118759109	BUCYRUS INTL INC	12/15/2008	02/17/2009			413.79	571.50	-157.71	0.00

2009 Tax Information Statement

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Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

☐ Corrected ☐ 2nd TIN notice

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
30.0000	12541W209	C.H.ROBINSON WORLDWIDE INC	05/19/2009	12/22/2009	1,761.58	1,548.60	212.98	0.00
45.0000	12541W209	C.H.ROBINSON WORLDWIDE INC	07/20/2009	12/22/2009	2,642.38	2,369.97	272.41	0.00
22.0000	12541W209	C.H.ROBINSON WORLDWIDE INC	10/26/2009	12/22/2009	1,291.83	1,253.78	38.05	0.00
22.0000	139594105	CAPELLA EDUCATION CO	05/19/2009	12/22/2009	1,645.34	1,177.66	467.68	0.00
40.0000	139594105	CAPELLA EDUCATION CO	06/01/2009	12/22/2009	2,991.52	2,079.15	912.37	0.00
41.0000	139594105	CAPELLA EDUCATION CO	03/16/2009	12/22/2009	3,068.31	1,892.06	1,174.25	0.00
46.0000	139594105	CAPELLA EDUCATION CO	10/16/2009	12/22/2009	3,440.25	3,309.70	130.55	0.00
153.0000	14149Y108	CARDINAL HEALTH INC	10/14/2009	12/18/2009	4,906.74	4,158.26	748.48	0.00
5000	14170T101	CAREFUSION CORP	11/26/2008	09/10/2009	9.40	8.85	0.55	0.00
40.0000	14754D100	CASH AMERICA INTERNATIONAL INC	01/28/2009	12/18/2009	1,290.82	776.74	514.08	0.00
75.0000	14754D100	CASH AMERICA INTERNATIONAL INC	06/12/2009	12/18/2009	2,420.28	1,700.25	720.03	0.00
36.0000	14888B103	CATALYST HEALTH SOLUTIONS INC	11/26/2008	01/28/2009	821.91	813.66	8.25	0.00
175.0000	14888B103	CATALYST HEALTH SOLUTIONS INC	11/26/2008	03/16/2009	3,145.05	3,955.28	-810.23	0.00
95.0000	14965A101	CAVIUM NETWORKS INC	05/19/2009	12/22/2009	2,270.48	1,395.55	874.93	0.00
159.0000	14965A101	CAVIUM NETWORKS INC	10/16/2009	12/22/2009	3,800.06	3,416.75	383.31	0.00
10.0000	14965A101	CAVIUM NETWORKS INC	12/22/2009	12/23/2009	240.99	238.99	2.00	0.00
50.0000	15135B101	CENTENE CORP	12/15/2008	04/06/2009	949.34	784.73	164.61	0.00
70.0000	15135B101	CENTENE CORP	VARIOUS	07/20/2009	1,251.74	1,218.95	32.79	0.00
30.0000	125269100	CF INDUSTRIES HOLDINGS INC	12/15/2008	02/17/2009	1,520.99	1,413.90	107.09	0.00

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2009 Tax Information Statement

Page 11 of 53

Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2706

☐ Corrected ☐ 2nd TIN notice

Number of shares (Box 5)		CUSIP (Box 1b)		Description (Box 7)		Date (Box 1a)		Date of Sale (Box 2)		Stocks, Bonds, etc. (Box 2)		Cost or other Basis (Box 4)		Net Gain or Loss (Box 4)		Federal Income Tax Withheld (Box 4)	
45.0000	125269100	CF INDUSTRIES HOLDINGS INC	VARIOUS	07/08/2009	3,203.38	2,577.54	825.84	0.00	0.00								
36.0000	16948Q103	CHINA REAL ESTATE ADR	11/09/2009	12/22/2009	353.87	507.60	-153.73	0.00	0.00								
40.0000	17275R102	CISCO SYS INC	10/22/2008	08/13/2009	859.55	702.45	157.10	0.00	0.00								
28.0000	172967101	CITIGROUP INC	11/26/2008	03/11/2009	44.80	202.16	-157.36	0.00	0.00								
6.0000	184496107	CLEAN HBRS INC	11/26/2008	01/09/2009	357.09	381.48	-24.39	0.00	0.00								
47.0000	184496107	CLEAN HBRS INC	05/19/2009	12/22/2009	2,797.41	2,498.99	298.42	0.00	0.00								
141.0000	18538Q105	CLEARWIRE CORP CLASS A	11/26/2008	08/11/2009	1,227.05	846.33	380.72	0.00	0.00								
142.0000	18538Q105	CLEARWIRE CORP CLASS A	11/26/2008	09/15/2009	1,263.77	852.33	411.44	0.00	0.00								
710.0000	18538Q105	CLEARWIRE CORP CLASS A	VARIOUS	10/12/2009	5,595.22	3,905.61	1,689.61	0.00	0.00								
75.0000	18683K101	CLIFFS NATURAL RESOURCES INC	02/23/2009	03/12/2009	971.57	1,601.15	-629.58	0.00	0.00								
66.0000	192446102	COGNIZANT TECHNOLOGY SOLUTIONS CORP	11/26/2008	04/30/2009	1,627.53	1,253.59	373.94	0.00	0.00								
321.0000	192446102	COGNIZANT TECHNOLOGY SOLUTIONS CORP	VARIOUS	05/29/2009	8,115.86	6,689.77	1,426.09	0.00	0.00								
35.0000	20030N200	COMCAST CORP CLASS A SPECIAL	11/26/2008	05/19/2009	493.02	555.07	-62.05	0.00	0.00								
531.0000	20030N200	COMCAST CORP CLASS A SPECIAL	10/14/2009	12/18/2009	8,607.49	7,842.34	765.15	0.00	0.00								
175.0000	20452A108	COMPELLENT TECHNOLOGIES INC	10/15/2009	11/03/2009	3,424.01	3,481.56	-57.55	0.00	0.00								
90.0000	20452A108	COMPELLENT TECHNOLOGIES INC	06/12/2009	12/18/2009	1,950.24	1,361.70	588.54	0.00	0.00								
25.0000	206708109	CONCUR TECHNOLOGIES INC	05/19/2009	08/21/2009	900.15	719.00	181.15	0.00	0.00								
102.0000	206708109	CONCUR TECHNOLOGIES INC	03/05/2009	12/22/2009	4,341.17	1,912.74	2,428.43	0.00	0.00								

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2009 Tax Information Statement

Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis (Box 4)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
9.0000	206708109	CONCUR TECHNOLOGIES INC	05/19/2009	12/22/2009	383.04	258.84	124.20	0.00
51.0000	206708109	CONCUR TECHNOLOGIES INC	10/16/2009	12/22/2009	2,170.59	2,036.94	133.65	0.00
60.0000	20825C104	CONOCOPHILLIPS	11/26/2008	08/21/2009	2,652.32	3,231.00	-578.68	0.00
1.0000	21075N204	CONTANGO OIL & GAS	10/16/2009	12/22/2009	47.46	53.25	-5.79	0.00
35.0000	217204106	COPART INC	03/16/2009	05/13/2009	1,063.84	998.08	65.76	0.00
35.0000	N22717107	CORE LABORATORIES N V	VARIOUS	06/16/2009	3,123.63	2,264.70	858.93	0.00
26.0000	N22717107	CORE LABORATORIES N V	05/19/2009	12/22/2009	2,984.72	2,246.40	738.32	0.00
39.0000	N22717107	CORE LABORATORIES N V	10/16/2009	12/22/2009	4,477.09	4,209.27	267.82	0.00
90.0000	G2554F105	COVIDIEN PLC SEDOL:B3QN1M2	06/12/2009	06/23/2009	3,238.85	3,253.76	-14.91	0.00
77.0000	22943F100	CTRIIP COM INTL LTD AMERICAN DEP SHS	VARIOUS	08/11/2009	3,928.02	2,662.07	1,265.95	0.00
8.0000	22943F100	CTRIIP COM INTL LTD AMERICAN DEP SHS	10/16/2009	10/26/2009	482.79	488.24	-5.45	0.00
77.0000	22943F100	CTRIIP COM INTL LTD AMERICAN DEP SHS	VARIOUS	11/16/2009	5,482.26	3,675.14	1,807.12	0.00
106.0000	231021106	CUMMINS INC	07/10/2009	08/28/2009	4,818.41	3,409.25	1,409.16	0.00
5.0000	231021106	CUMMINS INC	12/21/2009	12/22/2009	233.54	235.59	-2.05	0.00
80.0000	126667104	CV THERAPEUTICS INC	11/26/2008	02/13/2009	1,240.06	727.04	513.02	0.00
117.0000	126667104	CV THERAPEUTICS INC	11/26/2008	03/16/2009	2,295.34	1,063.30	1,232.04	0.00
124.0000	25243Q205	DIAGEO PLC SPONSORED ADR NEW	10/14/2009	12/18/2009	8,464.66	7,556.11	898.55	0.00
69.0000	25388B104	DIGITAL RIV INC	10/12/2009	12/22/2009	1,827.07	1,852.55	-25.48	0.00

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis (Box 4)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
40.0000	25659T107	DOLBY LABORATORIES INC CLASS A	12/15/2008	02/20/2009	1,188.95	1,122.65	66.30	0.00
30.0000	25659T107	DOLBY LABORATORIES INC CLASS A	12/15/2008	04/13/2009	1,036.33	841.99	194.34	0.00
40.0000	25659T107	DOLBY LABORATORIES INC CLASS A	12/15/2008	04/27/2009	1,479.43	1,122.66	356.77	0.00
77.0000	26153C103	DREAMWORKS ANIMATION SKG CL A	01/14/2009	12/22/2009	3,088.49	1,809.07	1,279.42	0.00
50.0000	26153C103	DREAMWORKS ANIMATION SKG CL A	05/19/2009	12/22/2009	2,005.51	1,273.00	732.51	0.00
56.0000	26153C103	DREAMWORKS ANIMATION SKG CL A	10/16/2009	12/22/2009	2,246.18	1,864.24	381.94	0.00
165.0000	278856109	ECLIPSYS CORP	12/15/2008	04/01/2009	1,604.37	2,229.61	-625.24	0.00
100.0000	278856109	ECLIPSYS CORP	01/27/2009	12/18/2009	1,828.07	855.94	972.13	0.00
32.0000	28238P109	EHEALTH INC	05/19/2009	09/22/2009	493.06	529.60	-36.54	0.00
311.0000	28238P109	EHEALTH INC	VARIOUS	09/23/2009	4,695.86	3,688.64	1,007.22	0.00
19.0000	285512109	ELECTRONIC ARTS	05/19/2009	12/22/2009	323.37	421.61	-98.24	0.00
390.0000	26873N108	EMS TECHNOLOGIES INC	VARIOUS	11/05/2009	5,154.69	7,513.32	-2,358.63	0.00
281.0000	26875P101	EOG RESOURCES	10/14/2009	12/18/2009	26,327.05	25,401.89	925.16	0.00
39.0000	29444U502	EQUINIX INC	VARIOUS	03/04/2009	1,767.08	1,979.91	-212.83	0.00
7.0000	302130109	EXPEDITORS INTL WASH INC	12/30/2008	12/22/2009	245.92	223.85	22.07	0.00
33.0000	302130109	EXPEDITORS INTL WASH INC	02/11/2009	12/22/2009	1,159.32	1,053.09	106.23	0.00
56.0000	302130109	EXPEDITORS INTL WASH INC	05/19/2009	12/22/2009	1,967.32	1,866.48	100.84	0.00
15.0000	302130109	EXPEDITORS INTL WASH INC	06/29/2009	12/22/2009	526.96	497.96	29.00	0.00
52.0000	302130109	EXPEDITORS INTL WASH INC	03/17/2009	12/22/2009	1,826.80	1,461.68	365.12	0.00

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
100.0000	302130109	EXPEDITORS INTL WASH INC	10/16/2009	12/22/2009	3,513.08	3,477.85	35.23	0.00
51.0000	302130109	EXPEDITORS INTL WASH INC	10/28/2009	12/22/2009	1,791.66	1,665.15	126.51	0.00
14.0000	302130109	EXPEDITORS INTL WASH INC	07/17/2009	12/22/2009	491.83	435.51	56.32	0.00
65.0000	315616102	F5 NETWORKS INC	05/21/2008	01/08/2009	1,533.62	1,830.40	-296.78	0.00
40.0000	303075105	FACTSET RESH SYS INC	12/15/2008	02/20/2009	1,558.08	1,403.60	154.48	0.00
30.0000	303075105	FACTSET RESH SYS INC	12/15/2008	03/17/2009	1,239.02	1,052.70	176.32	0.00
25.0000	303075105	FACTSET RESH SYS INC	12/15/2008	05/06/2009	1,361.47	877.25	484.22	0.00
23.0000	338433107	FIRST SOLAR INC	10/30/2009	12/22/2009	3,126.08	2,942.61	183.47	0.00
22.0000	338433107	FIRST SOLAR INC	11/05/2009	12/22/2009	2,990.16	2,674.99	315.17	0.00
16.0000	336433107	FIRST SOLAR INC	08/28/2009	12/22/2009	2,174.66	2,000.91	173.75	0.00
71.0000	34354P105	FLOWERVE CORP	11/26/2008	03/04/2009	3,442.61	3,507.40	-64.79	0.00
205.0000	348375108	FORM FACTOR INC	11/06/2009	12/18/2009	4,262.05	3,529.20	732.85	0.00
10.0000	302941109	FTI CONSULTING INC	12/31/2008	05/12/2009	500.37	443.80	56.57	0.00
35.0000	302941109	FTI CONSULTING INC	VARIOUS	08/04/2009	1,795.46	1,739.50	55.96	0.00
40.0000	302941109	FTI CONSULTING INC	VARIOUS	08/06/2009	1,758.35	1,694.27	64.08	0.00
40.0000	371532102	GENESCO INC	05/21/2008	04/09/2009	843.42	952.66	-109.24	0.00
23.0000	38259P508	GOOGLE INC-CL A	10/14/2009	12/18/2009	13,725.35	12,296.03	1,429.32	0.00
135.0000	384313102	GRAFTCH INTERNATIONAL LTD	05/05/2009	12/18/2009	2,158.78	1,362.41	796.37	0.00
155.0000	40049J206	GRUPO TELEVISIA SA DE CV GLOBAL DEP RCT REP ORD	10/14/2009	10/23/2009	3,144.48	2,989.67	154.81	0.00

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2009 Tax Information Statement

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Number of Shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
201.0000	40049J206	GRUPO TELEVIS SA DE CV GLOBAL DEP RCPT REP ORD	10/14/2009	12/18/2009	4,082.40	3,876.93	205.47	0.00
165.0000	401617105	GUESS INC	09/02/2009	12/22/2009	7,136.31	5,608.75	1,527.56	0.00
66.0000	401617105	GUESS INC	10/16/2009	12/22/2009	2,854.53	2,584.56	269.97	0.00
135.0000	411310105	HANSEN NATURAL CORP	VARIOUS	06/01/2009	4,854.45	4,003.56	850.89	0.00
40.0000	411310105	HANSEN NATURAL CORP	08/20/2009	12/22/2009	1,505.60	1,321.44	184.16	0.00
11.0000	411310105	HANSEN NATURAL CORP	08/28/2009	12/22/2009	414.04	361.77	52.27	0.00
18.0000	411310105	HANSEN NATURAL CORP	07/27/2009	12/22/2009	677.52	525.57	151.95	0.00
60.0000	G4412G101	HERBALIFE LTD	02/12/2009	12/18/2009	2,455.13	1,242.00	1,213.13	0.00
227.0000	428236103	HEWLETT PACKARD CO	10/14/2009	12/18/2009	11,649.45	10,881.97	767.48	0.00
225.0000	428291108	HEXCEL CORP	VARIOUS	07/23/2009	2,258.40	2,098.09	160.31	0.00
134.0000	444903108	HUMAN GENOME SCIENCES INC	07/21/2009	09/16/2009	2,660.84	1,964.23	696.61	0.00
317.0000	444903108	HUMAN GENOME SCIENCES INC	07/21/2009	12/22/2009	9,766.80	4,646.71	5,120.09	0.00
137.0000	444903108	HUMAN GENOME SCIENCES INC	10/16/2009	12/22/2009	4,220.99	2,712.46	1,508.53	0.00
628.0000	447011107	HUNTSMAN CORP	10/15/2009	12/18/2009	6,801.07	5,790.10	1,010.97	0.00
145.0000	447011107	HUNTSMAN CORP	03/18/2009	12/18/2009	1,570.31	454.92	1,115.39	0.00
265.0000	447011107	HUNTSMAN CORP	06/12/2009	12/18/2009	2,869.87	1,762.25	1,107.62	0.00
100.0000	45103T107	ICON PUB LTD CO SPONSORED ADR	VARIOUS	07/23/2009	2,169.31	2,061.00	108.31	0.00
594.0000	45667G103	INFINERA CORP	VARIOUS	07/22/2009	4,259.81	5,376.81	-1,117.00	0.00
80.0000	45666Q102	INFORMATICA CORP	03/20/2009	12/18/2009	1,909.55	1,120.14	789.41	0.00

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2009 Tax Information Statement

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 PITTSBURGH, PA 15222-2705

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or Other Basis (Box 4)	Net Gain or Loss	Federal Income Tax Withheld
230.0000	458118106	INTEGRATED DEVICE TECHNOLOGY INC	12/15/2008	03/12/2009	1,149.19	1,294.49	-145.30	0.00
27.0000	45865V100	INTERCONTINENTAL EXCHANGE INC	11/26/2008	03/24/2009	2,109.61	2,015.28	94.33	0.00
17.0000	45865V100	INTERCONTINENTAL EXCHANGE INC	05/19/2009	12/22/2009	1,859.58	1,810.67	48.91	0.00
26.0000	45865V100	INTERCONTINENTAL EXCHANGE INC	10/16/2009	12/22/2009	2,844.07	2,695.68	148.39	0.00
55.0000	46121Y102	INTREPID POTASH INC	12/15/2008	03/20/2009	902.90	1,010.35	-107.45	0.00
16.0000	46120E602	INTUITIVE SURGICAL INC	05/19/2009	07/17/2009	2,501.20	2,491.36	9.84	0.00
7.0000	46120E602	INTUITIVE SURGICAL INC	01/08/2009	12/22/2009	2,071.25	773.29	1,297.96	0.00
6.0000	46120E602	INTUITIVE SURGICAL INC	03/31/2009	12/22/2009	1,775.35	574.42	1,200.93	0.00
1.0000	46120E602	INTUITIVE SURGICAL INC	05/19/2009	12/22/2009	295.89	155.71	140.18	0.00
8.0000	46120E602	INTUITIVE SURGICAL INC	03/05/2009	12/22/2009	2,367.14	728.57	1,638.57	0.00
21.0000	46120E602	INTUITIVE SURGICAL INC	10/16/2009	12/22/2009	6,213.74	5,373.90	839.84	0.00
70.0000	46145F105	INVESTMENT TECHNOLOGY GROUP INC NEW	VARIOUS	07/06/2009	1,348.28	1,431.40	-83.12	0.00
60.0000	46145F105	INVESTMENT TECHNOLOGY GROUP INC NEW	12/15/2008	07/14/2009	1,143.82	1,122.00	21.82	0.00
74.0000	464330109	ISIS PHARMACEUTICALS	11/26/2008	02/25/2009	1,062.56	844.53	218.03	0.00
304.0000	464330109	ISIS PHARMACEUTICALS	VARIOUS	11/25/2009	3,392.92	3,943.33	-550.41	0.00
60.0000	46625H100	J.P. MORGAN CHASE & CO.	11/26/2008	01/23/2009	1,388.70	1,819.71	-431.01	0.00
5.0000	478160104	JOHNSON & JOHNSON	03/05/2009	12/18/2009	321.65	239.28	82.37	0.00
15.0000	478160104	JOHNSON & JOHNSON	09/24/2009	12/18/2009	964.95	911.16	53.79	0.00

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			Acquired	Sale		Stk	Bnd			
212.0000	478160104	JOHNSON & JOHNSON	10/14/2009	12/18/2009		13,638.04		12,825.62	812.42	0.00
20.0000	48273U102	K12 INC	07/23/2008	07/10/2009		336.62		479.31	-142.69	0.00
10.0000	515098101	LANDSTAR SYS INC	12/15/2008	05/12/2009		363.76		321.20	42.56	0.00
7309.9420	52106N889	LAZARD FDS INC EMERGING MKTS PORTFOLIO	05/21/2009	12/18/2009		131,652.06		100,000.00	31,652.06	0.00
45.0000	52602E102	LENDER PROCESSING SERV	02/17/2009	04/17/2009		1,300.94		1,214.38	86.56	0.00
65.0000	532791100	LINCARE HLDGS INC	VARIOUS	09/09/2009		1,663.16		1,674.28	-11.12	0.00
55.0000	532791100	LINCARE HLDGS INC	06/12/2009	12/18/2009		2,071.79		1,135.75	936.04	0.00
95.0000	501889208	LKQ CORP	05/19/2009	06/26/2009		1,561.32		1,469.48	91.84	0.00
101.0000	501889208	LKQ CORP	VARIOUS	10/15/2009		1,939.09		1,226.20	712.89	0.00
250.0000	501889208	LKQ CORP	10/16/2009	12/21/2009		4,788.82		4,772.25	16.57	0.00
548.0000	540424108	LOEWS CORP	10/14/2009	12/18/2009		19,749.95		19,458.60	291.35	0.00
135.0000	54318P108	LONGTOP FINL TECHNOLOGIES LTD ADR	08/14/2009	12/22/2009		4,982.04		4,008.60	973.44	0.00
84.0000	54318P108	LONGTOP FINL TECHNOLOGIES LTD ADR	11/19/2009	12/22/2009		3,099.94		2,712.23	387.71	0.00
56.0000	54318P108	LONGTOP FINL TECHNOLOGIES LTD ADR	10/16/2009	12/22/2009		2,066.63		1,657.04	409.59	0.00
30.0000	549764108	LUFKIN INDS, INC.	02/12/2009	12/18/2009		2,063.95		1,171.45	892.50	0.00
20.0000	549764108	LUFKIN INDS, INC.	02/24/2009	12/18/2009		1,375.96		663.04	712.92	0.00
15.0000	549764108	LUFKIN INDS, INC.	03/10/2009	12/18/2009		1,031.97		455.88	576.09	0.00

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			Acquired	Sale				
30.0000	549764108	LUFKIN INDS. INC.	06/12/2009	12/18/2009	2,063.95	1,378.80	685.15	0.00
1.0000	574795100	MASIMO CORPORATION	04/03/2009	12/22/2009	28.73	29.72	-0.99	0.00
135.0000	582411104	MCMORAN EXPLORATION, INC.	VARIOUS	02/09/2009	983.24	1,305.33	-322.09	0.00
17.0000	58501N101	MEDIVATION INC.	10/16/2009	12/09/2009	566.15	468.86	97.29	0.00
79.0000	58501N101	MEDIVATION INC.	06/01/2009	12/22/2009	2,928.45	1,702.97	1,225.48	0.00
17.0000	58501N101	MEDIVATION INC.	10/16/2009	12/22/2009	630.17	468.86	161.31	0.00
125.0000	587188103	MENTOR CORP MINN	12/15/2008	01/22/2009	3,875.00	3,830.00	45.00	0.00
102.0000	58733R102	MERCADOLIBRE INC	VARIOUS	08/12/2009	3,432.75	2,289.34	1,143.41	0.00
111.0000	58733R102	MERCADOLIBRE INC	10/16/2009	10/26/2009	4,458.40	4,644.13	-185.73	0.00
1.0000	58733R102	MERCADOLIBRE INC	10/16/2009	12/01/2009	52.08	41.84	10.24	0.00
5.0000	58933Y105	MERCK & CO INC	02/27/2009	12/18/2009	187.69	151.53	36.16	0.00
25.0000	58933Y105	MERCK & CO INC	03/18/2009	12/18/2009	938.48	666.01	272.47	0.00
10.0000	594918104	MICROSOFT CORP	11/26/2008	06/18/2009	235.59	203.28	32.31	0.00
481.0000	594918104	MICROSOFT CORP	10/14/2009	12/18/2009	14,458.96	12,519.71	1,939.25	0.00
51.0000	615369105	MOODYS INVESTORS SERV EX DI	01/05/2009	03/04/2009	864.64	1,121.14	-256.50	0.00
214.0000	615369105	MOODYS INVESTORS SERV EX DI	10/14/2009	12/18/2009	5,778.06	4,979.39	798.67	0.00
51.0000	55354G100	MSCI INC A	05/19/2009	05/19/2009	1,094.43	1,089.36	5.07	0.00
124.0000	55354G100	MSCI INC A	10/16/2009	12/22/2009	3,949.41	3,460.62	488.79	0.00
41.0000	55354G100	MSCI INC A	05/19/2009	12/22/2009	1,305.86	875.76	430.10	0.00

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2009 Tax Information Statement

Page 19 of 53

Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

☐ Corrected ☐ 2nd TIN notice

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
169.0000	628530107	MYLAN LABS INC	05/19/2009	07/23/2009	2,274.70	2,171.34	103.36	0.00
89.0000	628530107	MYLAN LABS INC	05/19/2009	09/29/2009	1,438.21	1,143.49	294.72	0.00
391.0000	628530107	MYLAN LABS INC	VARIOUS	12/10/2009	7,162.93	6,362.68	800.25	0.00
25.0000	62855J104	MYRIAD GENETICS INC	06/30/2008	02/20/2009	2,105.44	1,126.75	978.69	0.00
30.0000	62855J104	MYRIAD GENETICS INC	06/30/2008	04/23/2009	1,118.15	676.05	442.10	0.00
18.0000	637071101	NATIONAL-OILWELL INC	03/31/2009	12/22/2009	796.32	516.24	280.08	0.00
44.0000	637071101	NATIONAL-OILWELL INC	05/19/2009	12/22/2009	1,946.55	1,548.80	397.75	0.00
30.0000	637071101	NATIONAL-OILWELL INC	05/29/2009	12/22/2009	1,327.20	1,148.59	178.61	0.00
43.0000	637071101	NATIONAL-OILWELL INC	06/26/2009	12/22/2009	1,902.31	1,432.25	470.06	0.00
130.0000	64111N101	NETEZZA CORP	06/12/2009	07/21/2009	1,124.03	999.47	124.56	0.00
75.0000	64111N101	NETEZZA CORP	VARIOUS	10/05/2009	790.85	478.41	312.44	0.00
30.0000	64110L106	NETFLIX INC	12/11/2008	03/27/2009	1,198.51	834.78	363.73	0.00
20.0000	64110L106	NETFLIX INC	VARIOUS	04/23/2009	879.98	553.22	326.76	0.00
108.0000	64110L106	NETFLIX INC	VARIOUS	12/17/2009	5,828.84	4,248.92	1,579.92	0.00
756.0000	65248E104	NEWS CORPORATION CL A	10/14/2009	12/18/2009	10,077.97	9,358.15	719.82	0.00
275.0000	670006105	NOVELL INC	VARIOUS	04/07/2009	1,034.47	1,586.11	-551.64	0.00
215.0000	670006105	NOVELL INC	11/05/2008	09/24/2009	1,005.01	1,019.61	-14.60	0.00
220.0000	67020Y100	NUANCE COMMUNICATIONS INC	VARIOUS	12/01/2009	3,304.32	3,103.34	200.98	0.00
35.0000	675232102	OCEANEERING INTL INC	12/15/2008	02/13/2009	1,162.75	883.75	279.00	0.00

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Number of shares	CUSIP (Box 5)	Description (Box 7)	Date (Box 1a)		Date of Sale (Box 2)		Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
			Acquired	Sale	Acquired	Sale				
20.0000	675232102	OCEANEERING INTL INC	12/15/2008	04/15/2009		828.92	505.00	323.92	0.00	
30.0000	675232102	OCEANEERING INTL INC	12/15/2008	05/21/2009		1,402.00	757.50	644.50	0.00	
96.0000	675232102	OCEANEERING INTL INC	10/16/2009	12/22/2009		5,660.30	5,536.32	123.98	0.00	
55.0000	675232102	OCEANEERING INTL INC	05/19/2009	12/22/2009		3,242.88	2,730.75	512.13	0.00	
160.0000	68212S109	OMNITURE INC	VARIOUS	10/07/2009		3,427.11	1,997.74	1,429.37	0.00	
240.0000	682189105	ON SEMICONDUCTOR CORPORATION	04/29/2009	12/18/2009		1,949.10	1,294.80	654.30	0.00	
105.0000	671074102	OYO GEOSPACE	10/15/2009	12/18/2009		3,640.26	2,814.97	825.29	0.00	
30.0000	707569109	PENN NATIONAL GAMING INC	12/15/2008	04/23/2009		885.52	609.00	276.52	0.00	
65.0000	707569109	PENN NATIONAL GAMING INC	VARIOUS	09/08/2009		1,756.18	1,538.68	217.50	0.00	
4.0000	712704105	PEOPLE'S UNITED FINANCIAL IN	03/31/2009	12/22/2009		67.91	72.00	-4.09	0.00	
5.0000	71372U104	PERFECT WORLD CO LTD ADR ISIN US71372U1043 SEDOL B23F975	10/06/2009	12/22/2009		196.34	233.18	-36.84	0.00	
7687.6770	471023598	PERKINS MID CAP VALUE FUND CLASS J SHARES INVESTOR CLASS 67	05/18/2009	12/18/2009		150,215.25	125,000.00	25,215.25	0.00	
9825.0000	471023598	PERKINS MID CAP VALUE FUND CLASS J SHARES INVESTOR CLASS 67	05/21/2009	12/18/2009		188,072.50	154,000.00	34,072.50	0.00	
70.0000	714290103	PERRIGO CO	VARIOUS	08/14/2009		1,822.00	1,687.70	134.30	0.00	
60.0000	716788106	PETSMART INC	05/14/2009	06/12/2009		1,242.56	1,267.43	-24.87	0.00	
399.0000	717081103	PFIZER INC	10/14/2009	12/18/2009		7,293.92	6,670.56	623.36	0.00	
50.0000	717081103	PFIZER INC	03/04/2009	12/18/2009		914.03	627.50	286.53	0.00	
60.0000	718172109	PHILIP MORRIS INTERNAT-W/I	11/26/2008	03/02/2009		1,967.70	2,544.00	-576.30	0.00	

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 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
260.0000	726505100	PLAINS EXPLORATION & PRODUCT CO	VARIOUS	07/10/2009	6,283.02	5,007.78	1,275.24	0.00
150.0000	73755L107	POTASH CORP SASK INC	12/29/2008	12/18/2009	15,964.46	10,862.09	5,102.37	0.00
185.0000	742718109	PROCTER & GAMBLE CO	10/14/2009	12/18/2009	11,349.82	10,598.32	751.50	0.00
890.0000	743315103	PROGRESSIVE CORP OHIO	10/14/2009	12/18/2009	15,264.00	14,959.30	304.70	0.00
164.0000	74439H108	PSYCHIATRIC SOLUTIONS INC	VARIOUS	06/26/2009	3,731.05	3,695.26	35.79	0.00
25.0000	747582104	QUALITY SYSTEMS INC	05/21/2008	02/23/2009	985.25	871.00	114.25	0.00
160.0000	75025N102	RADIANT SYS INC	06/12/2009	06/17/2009	1,082.13	1,121.03	-38.90	0.00
125.0000	75025N102	RADIANT SYS INC	VARIOUS	07/17/2009	1,051.17	545.20	505.97	0.00
45.0000	75689M101	RED ROBIN GOURMET BURGERS	12/15/2008	01/15/2009	446.44	661.05	-214.61	0.00
28.0000	760975102	RESEARCH IN MOTION	05/19/2009	07/22/2009	2,060.52	2,114.00	-53.48	0.00
33.0000	760975102	RESEARCH IN MOTION	VARIOUS	08/28/2009	2,432.70	1,724.96	707.74	0.00
69.0000	760975102	RESEARCH IN MOTION	11/26/2008	09/25/2009	4,839.60	3,093.86	1,745.74	0.00
84.0000	76122Q105	RESOURCES CONNECTION, INC.	05/19/2009	06/26/2009	1,419.59	1,609.29	-189.70	0.00
32.0000	76122Q105	RESOURCES CONNECTION, INC.	08/25/2009	12/22/2009	670.72	506.46	164.26	0.00
198.0000	76122Q105	RESOURCES CONNECTION, INC.	10/16/2009	12/22/2009	4,150.07	3,561.82	588.25	0.00
47.0000	76122Q105	RESOURCES CONNECTION, INC.	05/19/2009	12/22/2009	985.12	900.43	84.69	0.00
260.0000	999803158	RIO TINTO RIGHTS	12/15/2008	07/17/2009	5,929.59	3,699.29	2,230.30	0.00
45.0000	767744105	RITCHIE BROS AUCTIONEERS INC	12/15/2008	01/13/2009	887.64	963.00	-75.36	0.00
35.0000	773903109	ROCKWELL INTL CORP NEW	05/19/2009	12/22/2009	1,663.19	1,157.45	505.74	0.00

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
91.0000	773903109	ROCKWELL INTL CORP NEW	06/30/2009	12/22/2009	4,324.30	2,909.16	1,415.14	0.00
101.0000	773903109	ROCKWELL INTL CORP NEW	03/05/2009	12/22/2009	4,799.50	1,800.12	2,999.38	0.00
102.0000	773903109	ROCKWELL INTL CORP NEW	10/16/2009	12/22/2009	4,847.01	4,310.34	536.67	0.00
50.0000	775711104	ROLLINS INC	05/21/2008	02/25/2009	797.37	810.32	-12.95	0.00
65.0000	775711104	ROLLINS INC	05/21/2008	03/27/2009	1,040.23	1,053.42	-13.19	0.00
50.0000	779376102	ROVI CORP	04/14/2009	12/18/2009	1,537.51	950.10	587.41	0.00
65.0000	779376102	ROVI CORP	06/12/2009	12/18/2009	1,998.76	1,470.30	528.46	0.00
80.0000	779376102	ROVI CORP	02/18/2009	12/18/2009	2,460.02	1,197.68	1,262.34	0.00
6410.2560	780905832	ROYCE OPPORTUNITY FUND INVESTMENT CLASS FD.249	06/11/2009	12/18/2009	56,217.95	45,000.00	11,217.95	0.00
16583.7480	780905832	ROYCE OPPORTUNITY FUND INVESTMENT CLASS FD.249	04/24/2009	12/18/2009	145,439.47	100,000.00	45,439.47	0.00
21629.4160	700159833	RS EMERGING MARKETS FUND CLASS A	04/23/2009	12/18/2009	482,119.69	300,000.00	182,119.69	0.00
60.0000	783859101	S & T BANCORP INC	VARIOUS	06/22/2009	752.74	1,591.62	-838.88	0.00
92.0000	79466L302	SALESFORCE.COM	10/16/2009	12/22/2009	6,562.28	5,738.96	823.32	0.00
59.0000	79466L302	SALESFORCE.COM	05/19/2009	12/22/2009	4,208.42	2,430.80	1,777.62	0.00
739.0000	81211K100	SEALED AIR CORP NEW	10/14/2009	12/18/2009	16,111.33	14,999.04	1,112.29	0.00
47.0000	820280105	SHAW GROUP INC	05/19/2009	12/22/2009	1,391.68	1,337.15	54.53	0.00
75.0000	820280105	SHAW GROUP INC	10/16/2009	12/22/2009	2,220.76	2,110.50	110.26	0.00
226.0000	820280105	SHAW GROUP INC	12/22/2009	12/23/2009	6,662.49	6,696.15	-33.66	0.00

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date (Box 1a)		Date of Sale (Box 2)		Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
			Acquired	Sale	Acquired	Sale				
195.0000	8255649108	SHUFFLE MASTER INC	03/16/2009	12/18/2009			1,423.69	559.36	864.33	0.00
28.0000	82669G104	SIGNATURE BK NEW YORK NY	12/30/2008	12/22/2009			912.19	750.15	162.04	0.00
25.0000	82669G104	SIGNATURE BK NEW YORK NY	02/24/2009	12/22/2009			814.46	607.62	206.84	0.00
49.0000	82669G104	SIGNATURE BK NEW YORK NY	05/19/2009	12/22/2009			1,596.34	1,352.40	243.94	0.00
32.0000	82669G104	SIGNATURE BK NEW YORK NY	06/01/2009	12/22/2009			1,042.51	880.72	161.79	0.00
83.0000	82669G104	SIGNATURE BK NEW YORK NY	03/05/2009	12/22/2009			2,052.44	1,332.43	720.01	0.00
103.0000	82669G104	SIGNATURE BK NEW YORK NY	10/16/2009	12/22/2009			3,355.56	3,190.20	165.36	0.00
20.0000	82669G104	SIGNATURE BK NEW YORK NY	06/03/2009	12/22/2009			651.57	522.95	128.62	0.00
155.0000	835898107	SOTHEBY'S HLDGS INC CLASS A	06/23/2009	12/18/2009			3,524.82	1,979.20	1,545.62	0.00
116.0000	848574109	SPIRIT AEROSYSTEMS HOLD CL A	05/19/2009	08/04/2009			1,577.60	1,653.74	-76.14	0.00
188.0000	848574109	SPIRIT AEROSYSTEMS HOLD CL A	10/16/2009	12/22/2009			3,760.09	3,340.08	420.01	0.00
54.0000	848574109	SPIRIT AEROSYSTEMS HOLD CL A	10/19/2009	12/22/2009			1,080.03	1,004.09	75.94	0.00
23.0000	848574109	SPIRIT AEROSYSTEMS HOLD CL A	05/19/2009	12/22/2009			460.01	327.90	132.11	0.00
44.0000	784635104	SPX CORP	VARIOUS	07/10/2009			2,082.79	1,949.98	132.81	0.00
73.0000	784635104	SPX CORP	VARIOUS	07/20/2009			3,923.65	2,620.06	1,303.59	0.00
91.0000	85590A401	STARWOOD HOTELS & RESORTS WORLDWIDE INC	VARIOUS	03/31/2009			1,160.24	1,482.13	-321.89	0.00
8000	857873202	STEAK N SHAKE COMPANY	08/25/2009	12/31/2009			266.90	173.06	93.84	0.00
19.0000	863236105	STRAYER ED INC	05/19/2009	12/22/2009			4,121.18	3,721.53	399.65	0.00
55.0000	867652109	SUNPOWER CO.	01/30/2009	03/02/2009			1,407.06	1,865.16	-458.10	0.00

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35.0000	868873100	SURMODICS INC	12/15/2008	02/06/2009	658.73	808.15	-149.42	0.00
60.0000	78486Q101	SVB FINANCIAL GROUP	VARIOUS	01/20/2009	1,213.60	3,023.14	-1,809.54	0.00
415.0000	880770102	TERADYNE INC	10/15/2009	12/09/2009	4,022.95	4,244.71	-221.76	0.00
205.0000	880770102	TERADYNE INC	07/14/2009	12/18/2009	2,093.28	1,409.13	684.15	0.00
60.0000	882491103	TEXAS INDUSTRIES INC	12/08/2008	02/19/2009	1,119.17	2,222.05	-1,102.88	0.00
417.0000	882508104	TEXAS INSTRUMENTS INC	10/14/2009	12/18/2009	10,579.43	9,861.30	718.13	0.00
19.0000	885175307	THORATEC CORP	05/19/2009	07/30/2009	492.69	516.42	-23.73	0.00
22.0000	885175307	THORATEC CORP	05/19/2009	09/21/2009	671.61	597.96	73.65	0.00
6.0000	885175307	THORATEC CORP	05/19/2009	12/22/2009	161.52	163.08	-1.56	0.00
62.0000	885175307	THORATEC CORP	07/22/2009	12/22/2009	1,669.07	1,546.46	122.61	0.00
29.0000	885175307	THORATEC CORP	07/28/2009	12/22/2009	780.70	704.60	76.10	0.00
260.0000	88632Q103	TIBCO SOFTWARE INC	06/12/2009	06/19/2009	1,584.97	1,686.93	-101.96	0.00
450.0000	88632Q103	TIBCO SOFTWARE INC	VARIOUS	12/18/2009	4,100.06	4,173.36	-73.30	0.00
30.0000	88632Q103	TIBCO SOFTWARE INC	12/18/2009	12/18/2009	273.34	273.85	-0.51	0.00
25.0000	893521104	TRANSATLANTIC HLDGS INC	03/09/2009	12/18/2009	1,259.96	674.48	585.48	0.00
364.0000	89784N104	TRUE RELIGION APPAREL INC	VARIOUS	11/04/2009	7,669.65	8,070.84	-401.19	0.00
25.0000	G9144P105	TYCO ELECTRONICS LTD EXCH 06/25/2009 SEE H8912P106	11/26/2008	03/24/2009	270.12	395.75	-125.63	0.00
11.0000	903914109	ULTRA PETE CORP CA9039141093	11/26/2008	01/28/2009	398.39	468.93	-70.54	0.00
61.0000	903914109	ULTRA PETE CORP CA9039141093	VARIOUS	02/23/2009	2,085.00	2,491.12	-406.12	0.00

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 PITTSBURGH, PA 15222-2705

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 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks Bonds etc (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
93.0000	903914109	ULTRA PETE CORP CA9039141093	06/26/2009	12/22/2009	4,742.32	3,769.15	973.17	0.00
39.0000	903914109	ULTRA PETE CORP CA9039141093	09/29/2009	12/22/2009	1,988.71	1,905.97	82.74	0.00
90.0000	911163103	UNITED NAT FOODS INC	05/21/2008	01/12/2009	1,573.72	1,818.90	-245.18	0.00
218.0000	91324P102	UNITEDHEALTH GROUP INC	10/14/2009	12/16/2009	6,979.53	5,355.87	1,623.66	0.00
65.0000	922207105	VARIAN SEMICONDUCTOR EQUIPMENT ASSOCS INC	06/12/2009	12/18/2009	2,298.40	1,597.05	701.35	0.00
125.0000	922207105	VARIAN SEMICONDUCTOR EQUIPMENT ASSOCS INC	01/12/2009	12/18/2009	4,420.01	2,478.72	1,941.29	0.00
123.0000	92532F100	VERTEX PHARMACEUTICALS INC	VARIOUS	10/27/2009	4,116.75	4,004.32	112.43	0.00
230.0000	92849E101	VITAMIN SHOPPE INC	10/29/2009	12/18/2009	4,967.87	4,349.83	618.04	0.00
50.0000	928563402	VMWARE INC CLASS A	05/19/2009	08/20/2009	1,543.57	1,426.50	117.07	0.00
36.0000	928563402	VMWARE INC CLASS A	05/19/2009	12/22/2009	1,523.19	1,027.08	496.11	0.00
109.0000	929740108	WABTEC	07/24/2009	12/22/2009	4,484.36	3,683.39	800.97	0.00
59.0000	929740108	WABTEC	10/16/2009	12/22/2009	2,427.32	2,308.67	118.65	0.00
90.0000	941053100	WASTE CONNECTIONS INC	05/21/2008	02/09/2009	2,366.66	2,863.48	-496.82	0.00
40.0000	949746101	WELLS FARGO & CO NEW	01/26/2009	12/18/2009	1,048.01	636.54	411.47	0.00
70.0000	949746101	WELLS FARGO & CO NEW	03/06/2009	12/18/2009	1,834.02	607.80	1,226.22	0.00
35.0000	966387102	WHITING PETROLEUM CORP	01/05/2009	02/18/2009	891.61	1,402.46	-510.85	0.00
114.0000	966387102	WHITING PETROLEUM CORP	VARIOUS	07/08/2009	3,569.71	4,073.39	-503.68	0.00
50.0000	966387102	WHITING PETROLEUM CORP	08/06/2009	12/18/2009	3,459.91	2,385.35	1,074.56	0.00

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2009 Tax Information Statement

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Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

☐ Corrected ☐ 2nd TIN notice

Number of shares	CUSIP (Box 5)	Description (Box 7)	Date (Box 1a)		Date of Sale (Box 2)		Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
			Acquired	Sale	Stocks, Bonds, etc.				
30.0000	929297109	WMS INDUSTRIES INC	12/15/2008	05/08/2009	986.43	707.70	278.73	0.00	
55.0000	929297109	WMS INDUSTRIES INC	VARIOUS	07/02/2009	1,673.19	1,404.45	268.74	0.00	
367.0000	929352102	WUXI PHARMATECH INC SPONSORED ADR	11/26/2008	03/26/2009	1,883.40	2,259.03	-375.63	0.00	
27.0000	983134107	WYNN RESORTS LTD	07/17/2009	08/11/2009	1,474.52	981.05	493.47	0.00	
71.0000	983134107	WYNN RESORTS LTD	07/17/2009	12/22/2009	4,231.49	2,579.79	1,651.70	0.00	
Total Short Term Sales Reported on 1099-B								467,233.99	0.00
Long Term 15% Sales Reported on 1099-B									
54.0000	00846U101	AGILENT TECHNOLOGIES INC	11/26/2008	12/18/2009	1,597.87	1,009.26	588.61	0.00	
134.0000	025816109	AMERICAN EXPRESS CO	11/26/2008	12/18/2009	5,416.28	2,965.22	2,451.06	0.00	
145.0000	02744M108	AMERICAN MEDICAL SYS HLDGS	12/15/2008	12/18/2009	2,515.87	1,224.99	1,290.88	0.00	
20.0000	03076C106	AMERIPRISE FINANCIAL INC-W/I	11/26/2008	12/18/2009	762.23	352.40	409.83	0.00	
95.0000	03662Q105	ANSYS INC	12/15/2008	12/18/2009	3,941.44	2,625.80	1,315.64	0.00	
102.0000	03662Q105	ANSYS INC	11/26/2008	12/22/2009	4,378.89	3,033.38	1,345.51	0.00	
240.0000	054536107	AXA SPONS ADR	12/15/2008	12/18/2009	5,465.13	4,912.52	552.61	0.00	
20.0000	056752108	BAIDU INC	11/26/2008	12/22/2009	7,937.59	2,865.99	5,071.60	0.00	
7.0000	056752108	BAIDU INC	12/12/2008	12/22/2009	2,778.16	788.45	1,989.71	0.00	
295.0000	055262505	BASF AG SPONSORED ADR	12/15/2008	12/18/2009	18,069.37	10,222.76	7,846.61	0.00	
22.0000	075898100	BED BATH BEYOND INC	11/26/2008	12/18/2009	823.69	457.16	366.53	0.00	

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 PITTSBURGH, PA 15222-2705

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis (Box 1a)	Net Gain or Loss (Box 4)	Federal Income Tax Withheld
610.0000	098606108	BHP BILLITON LTD SPONSORED ADR	12/15/2008	12/18/2009	44,059.47	25,423.27	18,636.20	0.00
25.0000	090572207	BIO RAD LABS INC CL A	12/15/2008	12/18/2009	2,407.68	1,622.50	785.18	0.00
230.0000	110448107	BRITISH AMERN TOB PLC SPONSORED ADR	12/15/2008	12/18/2009	14,314.14	11,486.78	2,827.36	0.00
355.0000	112585104	BROOKFIELD ASSET MANAGEMENT CL A ISIN CA1125851040 SEDOL 2092555	12/15/2008	12/18/2009	7,582.96	4,823.56	2,759.40	0.00
66.0000	12541W209	C.H.ROBINSON WORLDWIDE INC	11/26/2008	12/22/2009	3,875.48	3,386.36	489.12	0.00
290.0000	12721E102	CADBURY PLC SPONS ADR	12/15/2008	12/18/2009	14,691.02	9,852.20	4,838.82	0.00
35.0000	136385101	CANADIAN NAT RES LTD	11/26/2008	12/18/2009	2,370.83	1,375.15	995.68	0.00
205.0000	136385101	CANADIAN NAT RES LTD	12/15/2008	12/18/2009	13,811.11	7,728.14	6,082.97	0.00
300.0000	136375102	CANADIAN NATL RY CO	12/15/2008	12/18/2009	15,810.19	9,910.24	5,899.95	0.00
305.0000	13645T100	CANADIAN PACIFIC RAILWAY LTD	12/15/2008	12/18/2009	16,058.14	9,753.24	6,304.90	0.00
25.0000	14149Y108	CARDINAL HEALTH INC	11/26/2008	12/18/2009	801.75	577.18	224.57	0.00
246.0000	14965A101	CAVIUM NETWORKS INC	11/26/2008	12/22/2009	5,879.35	2,612.52	3,266.83	0.00
8.0000	184496107	CLEAN HBRS INC	12/31/2007	01/09/2009	476.11	409.02	67.09	0.00
126.0000	184496107	CLEAN HBRS INC	12/31/2007	12/22/2009	7,499.45	6,442.09	1,057.36	0.00
180000.0000	191216AH3	COCA-COLA CO NT	04/02/2007	02/24/2009	192,317.40	184,811.40	7,506.00	0.00
150.0000	192479103	COHERENT INC	12/15/2008	12/18/2009	4,151.91	3,093.42	1,058.49	0.00
126.0000	20030N200	COMCAST CORP CLASS A SPECIAL	11/26/2008	12/18/2009	2,042.46	1,998.23	44.23	0.00
450.0000	G24140108	COOPER INDUSTRIES PLC SEDOL B40K911 ISIN IE00B40K9117	12/15/2008	12/18/2009	18,738.86	12,270.69	6,468.17	0.00

2009 Tax Information Statement

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 FREDERICK, MD 21702-2509

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 1a)	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
95.0000	N22717107	CORE LABORATORIES N.V.	12/15/2008	12/18/2009	10,687.22	5,079.42	5,607.80	0.00
66.0000	N22717107	CORE LABORATORIES N.V.	11/26/2008	12/22/2009	7,576.60	4,488.50	3,088.10	0.00
99.0000	22180K105	COSTCO WHSL CORP NEW	11/26/2008	12/18/2009	5,714.13	5,068.80	645.33	0.00
49.0000	22943F100	CTRIIP COM INTL LTD AMERICAN DEP SHS	11/26/2008	12/07/2009	3,742.12	1,060.31	2,681.81	0.00
83.0000	22943F100	CTRIIP COM INTL LTD AMERICAN DEP SHS	11/26/2008	12/22/2009	5,813.17	1,796.04	4,017.13	0.00
160.0000	126867104	CV THERAPEUTICS INC	12/31/2007	03/16/2009	3,138.93	1,449.60	1,689.33	0.00
30.0000	25243Q205	DIAGEO PLC SPONSORED ADR NEW	11/26/2008	12/18/2009	2,045.48	1,681.20	364.28	0.00
220.0000	25243Q205	DIAGEO PLC SPONSORED ADR NEW	12/15/2008	12/18/2009	14,953.23	12,436.42	2,516.81	0.00
200.0000	293570107	ENSIGN ENERGY SERVICES INC SEDOL B00LXQ9	12/15/2008	12/18/2009	2,818.20	2,009.35	808.85	0.00
40.0000	26875P101	EOG RESOURCES	11/26/2008	12/18/2009	3,747.62	3,516.80	230.82	0.00
60.0000	302130109	EXPEDITORS INTL WASH INC	12/15/2008	12/22/2009	2,107.85	1,872.88	234.97	0.00
200000.0000	341081EN3	FLORIDA POWER & LIGHT 1ST MTG	04/03/2007	06/08/2009	206,818.00	196,474.00	10,344.00	0.00
7.0000	372917104	GENZYME CORP	11/26/2008	12/22/2009	337.04	337.04	0.00	0.00
2.0000	38259P508	GOOGLE INC-CL A	11/26/2008	12/18/2009	1,193.51	580.08	613.43	0.00
75.0000	40049J206	GRUPO TELEvisa SA DE CV GLOBAL DEP RCPT REP ORD	11/26/2008	12/18/2009	1,523.29	1,115.25	408.04	0.00
175.0000	411310105	HANSEN NATURAL CORP	09/12/2008	12/22/2009	6,587.00	4,249.12	2,337.88	0.00
5.0000	411310105	HANSEN NATURAL CORP	09/16/2008	12/22/2009	188.20	117.60	70.60	0.00

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 PITTSBURGH, PA 15222-2705

Number of Shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
6796.5250	411511306	HARBOR FD INTL FD	12/31/2007	04/13/2009	251,267.53	485,000.00	-233,732.47	0.00
20.0000	428236103	HEWLETT PACKARD CO	10/24/2008	12/18/2009	1,026.38	650.15	376.23	0.00
17.0000	428236103	HEWLETT PACKARD CO	11/26/2008	12/18/2009	872.43	596.19	276.24	0.00
160.0000	447011107	HUNTSMAN CORP	11/24/2008	12/18/2009	1,732.75	985.70	747.05	0.00
240.0000	447011107	HUNTSMAN CORP	12/17/2008	12/18/2009	2,599.13	726.65	1,872.48	0.00
800.0000	G47791101	INGERSOLL-RAND PLC SEDOL: B633030	12/15/2008	12/18/2009	28,608.06	11,790.64	16,817.42	0.00
44.0000	45865V100	INTERCONTINENTAL EXCHANGE INC	11/26/2008	12/22/2009	4,813.03	3,284.16	1,528.87	0.00
25.0000	46120E602	INTUITIVE SURGICAL INC	11/26/2008	12/22/2009	7,397.31	3,367.67	4,029.64	0.00
3612.0000	464287309	ISHARES TR S&P 500 GROWTH INDEX FD	03/08/2007	10/15/2009	202,586.81	232,418.80	-29,831.99	0.00
3612.0000	464287309	ISHARES TR S&P 500 GROWTH INDEX FD	03/08/2007	10/16/2009	202,041.77	232,418.80	-30,377.03	0.00
12226.0000	464287309	ISHARES TR S&P 500 GROWTH INDEX FD	03/08/2007	11/25/2009	705,544.32	786,697.73	-81,153.41	0.00
70.0000	46625H100	J P MORGAN CHASE & CO	11/26/2008	12/18/2009	2,812.52	2,123.00	689.52	0.00
15.0000	478160104	JOHNSON & JOHNSON	10/21/2008	12/18/2009	964.95	957.92	7.03	0.00
15.0000	48273U102	K12 INC	07/23/2008	12/22/2009	299.24	359.48	-60.24	0.00
70.0000	515098101	LANDSTAR SYS INC	12/15/2008	12/18/2009	2,769.82	2,248.40	521.42	0.00
254.0000	501889208	LKQ CORP	11/26/2008	12/21/2009	4,865.45	2,709.42	2,156.03	0.00
82.0000	540424108	LOEWS CORP	11/26/2008	12/18/2009	2,955.29	2,240.24	715.05	0.00
44.0000	58733R102	MERCADOLIBRE INC	11/26/2008	12/01/2009	2,291.46	531.96	1,759.50	0.00

2009 Tax Information Statement

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
61.0000	58733R102	MERCADOLIBRE INC	11/26/2008	12/10/2009	2,974.45	737.48	2,236.97	0.00
130.0000	58733R102	MERCADOLIBRE INC	11/26/2008	12/22/2009	6,854.72	1,571.69	5,283.03	0.00
7610	58933Y105	MERCK & CO INC	11/07/2008	11/10/2009	25.47	19.51	5.96	0.00
36.0000	58933Y105	MERCK & CO INC	11/07/2008	12/18/2009	1,351.40	922.75	428.65	0.00
11235.0000	464287408	MFC ISHARES TR S&P 500 BARRA VALUE INDEX FUND	03/08/2007	10/14/2009	591,182.86	864,474.25	-273,291.39	0.00
103.0000	594918104	MICROSOFT CORP	11/26/2008	12/18/2009	3,096.20	2,093.84	1,002.36	0.00
29.0000	615389105	MOODY'S INVESTORS SERV EX DI	11/26/2008	12/18/2009	783.01	611.03	171.98	0.00
107.0000	55354G100	MSCI INC A	11/26/2008	12/22/2009	3,407.97	1,710.82	1,697.15	0.00
66.0000	628530107	MYLAN LABS INC	11/26/2008	12/10/2009	1,209.09	614.54	594.55	0.00
48.0000	628530107	MYLAN LABS INC	10/14/2008	12/22/2009	903.38	415.80	487.58	0.00
157.0000	628530107	MYLAN LABS INC	10/17/2008	12/22/2009	2,954.81	1,191.54	1,763.27	0.00
495.0000	628530107	MYLAN LABS INC	11/26/2008	12/22/2009	9,316.10	4,609.04	4,707.06	0.00
1925.0000	G6359F103	NABORS INDUSTRIES LTD	12/15/2008	12/18/2009	41,560.26	24,002.44	17,557.82	0.00
92.0000	637071101	NATIONAL-OILWELL INC	11/26/2008	12/22/2009	4,070.07	2,667.86	1,402.21	0.00
425.0000	641069406	NESTLE S A SPONSORED ADR REPSTG REG SH	12/15/2008	12/18/2009	20,280.47	15,022.60	5,257.87	0.00
136.0000	65248E104	NEWS CORPORATION CL A	11/26/2008	12/18/2009	1,812.97	996.68	816.29	0.00
1255.0000	H5833N103	NOBLE CORPORATION SEDOL: B65Z9D7	12/15/2008	12/18/2009	51,190.13	31,523.19	19,666.94	0.00
210.0000	66987V109	NOVARTIS AG SPONSORED ADR	12/15/2008	12/18/2009	11,320.91	9,721.87	1,599.04	0.00

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2009 Tax Information Statement

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620 LIBERTY AVENUE-10TH FLOOR

PITTSBURGH, PA 15222-2705

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis (Box 4)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
220.0000	67020Y100	NUANCE COMMUNICATIONS INC	11/26/2008	12/01/2009	3,304.32	2,014.98	1,289.34	0.00
71.0000	674599105	OCCIDENTAL PETE CORP	11/26/2008	12/18/2009	5,669.20	3,870.21	1,798.99	0.00
142.0000	675232102	OCEANEERING INTL INC	11/26/2008	12/22/2009	8,372.53	3,666.30	4,706.23	0.00
75.0000	671074102	OYO GEOSPACE	12/15/2008	12/18/2009	2,600.19	1,247.25	1,352.94	0.00
13374.9440	471023598	PERKINS MID CAP VALUE FUND CLASS J SHARES INVESTOR CLASS 67	12/31/2007	12/21/2009	263,620.15	300,000.00	-36,379.85	0.00
150.0000	73755L107	POTASH CORP SASK INC	12/15/2008	12/18/2009	15,964.46	10,289.45	5,675.01	0.00
150.0000	743315103	PROGRESSIVE CORP OHIO	11/26/2008	12/18/2009	2,572.58	2,219.78	352.80	0.00
55.0000	747582104	QUALITY SYSTEMS INC	05/21/2008	12/18/2009	3,313.11	1,916.20	1,396.91	0.00
287.0000	74782E102	QUANTA SVCS INC	11/26/2008	12/22/2009	6,288.29	4,559.51	1,728.78	0.00
7.0000	76122Q105	RESOURCES CONNECTION, INC.	02/04/2008	06/26/2009	118.30	145.76	-27.46	0.00
336.0000	76122Q105	RESOURCES CONNECTION, INC.	11/26/2008	12/22/2009	7,042.54	5,950.56	1,091.98	0.00
260.0000	767204100	RIO TINTO PLC SPONSORED ADR	12/15/2008	12/18/2009	52,409.45	20,574.76	31,834.69	0.00
14867.8410	780905832	ROYCE OPPORTUNITY FUND INVESTMENT CLASS FD 249	05/15/2008	12/23/2009	135,000.00	161,167.40	-26,167.40	0.00
9254.2680	700159833	RS EMERGING MARKETS FUND CLASS A	08/08/2008	12/18/2009	206,277.63	206,000.00	277.63	0.00
60.0000	74975E303	RWE AG SPONSORED ADR REPSTG ORD PAR	12/15/2008	12/18/2009	5,603.85	5,115.00	488.85	0.00
155.0000	79466L302	SALESFORCE.COM	11/26/2008	12/22/2009	11,056.02	4,527.32	6,528.70	0.00
605.0000	806857108	SCHLUMBERGER LTD	12/15/2008	12/18/2009	38,156.97	25,513.76	12,643.21	0.00

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2009 Tax Information Statement

Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Corrected ☐ 2nd TIN notice ☐

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis (Box 1a)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
115.0000	81211K100	SEALED AIR CORP NEW	11/26/2008	12/18/2009	2,507.18	1,747.83	759.35	0.00
43.0000	820280105	SHAW GROUP INC	10/14/2008	12/22/2009	1,273.24	841.90	431.34	0.00
41.0000	820280105	SHAW GROUP INC	11/26/2008	12/22/2009	1,214.02	712.13	501.89	0.00
26.0000	820280105	SHAW GROUP INC	12/16/2008	12/22/2009	769.87	500.22	269.65	0.00
69.0000	82669G104	SIGNATURE BK NEW YORK NY	11/26/2008	12/22/2009	2,247.91	2,063.09	184.82	0.00
360.0000	848574109	SPIRIT AEROSYSTEMS HOLD CL A	11/26/2008	12/22/2009	7,200.17	3,189.60	4,010.57	0.00
43.0000	863236105	STRAYER ED INC	12/31/2007	12/22/2009	9,326.89	7,340.40	1,986.49	0.00
1155.0000	867224107	SUNCOR ENERGY INC (SIN CA867224107 SEDOL B3NBOP5	12/15/2008	12/18/2009	39,072.64	23,642.27	15,430.37	0.00
5709.5340	77956H815	T. ROWE PRICE EMERGING EUROPE & MEDITERRANEAN FD 131	05/15/2008	05/21/2009	64,517.73	206,000.00	-141,482.27	0.00
540.0000	87425E103	TALISMAN ENERGY INC	12/15/2008	12/18/2009	9,612.02	5,043.60	4,568.42	0.00
965.0000	88031M109	TENARIS SA ADR	12/15/2008	12/18/2009	38,567.64	19,488.65	19,078.99	0.00
70.0000	880315103	TERRA INDUSTRIES INC	11/12/2008	12/18/2009	2,262.34	997.05	1,265.29	0.00
10.0000	882508104	TEXAS INSTRUMENTS INC	08/06/2008	12/18/2009	253.70	245.88	7.82	0.00
35.0000	882508104	TEXAS INSTRUMENTS INC	11/06/2008	12/18/2009	887.96	615.22	272.74	0.00
60.0000	882508104	TEXAS INSTRUMENTS INC	11/26/2008	12/18/2009	1,522.22	917.40	604.82	0.00
13.0000	885175307	THORATEC CORP	12/31/2007	02/04/2009	341.38	237.37	104.01	0.00
165.0000	885175307	THORATEC CORP	05/21/2008	12/18/2009	4,403.90	2,605.06	1,798.84	0.00
58.0000	885175307	THORATEC CORP	12/31/2007	12/22/2009	1,561.39	1,059.06	502.33	0.00

2009 Tax Information Statement

Page 33 of 53

Account Number: 45460017758745
 Recipient's Tax ID number: XX-XXX7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

☐ Corrected
☐ 2nd TIN notice

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
60.0000	885175307	THORATEC CORP	02/27/2008	12/22/2009	1,615.23	912.60	702.63	0.00
6549.1180	89155H827	TOUCHSTONE SANDS CAPITAL SELECT GROWTH FD CLASS Y	05/15/2008	12/21/2009	52,000.00	57,697.73	-5,697.73	0.00
550.0000	H8817H100	TRANSOCEAN LTD SEDOL B3KFWW1	12/15/2008	12/18/2009	45,688.97	31,229.22	14,459.75	0.00
135.0000	895945103	TRICAN WELL SVC LTD ISIN CA8959451037 SEDOL 2869964	12/15/2008	12/18/2009	1,821.10	789.03	1,032.07	0.00
800.0000	H89231338	UBS AG - NEW ISIN CH0024899483 SEDOL B18YFJ4	12/15/2008	12/18/2009	12,024.49	9,701.59	2,322.90	0.00
480.0000	904784709	UNILEVER N.V. NEW YORK SHS NEW	12/15/2008	12/18/2009	15,148.89	11,396.39	3,752.50	0.00
36.0000	91324P102	UNITEDHEALTH GROUP INC	11/26/2008	12/16/2009	1,152.58	756.72	395.86	0.00
155.0000	913483103	UNIVERSAL ELECTRS INC	12/15/2008	12/18/2009	3,599.00	2,243.59	1,355.41	0.00
1465.0000	91912E105	VALE S.A. COMMON NEW ADR	12/15/2008	12/18/2009	39,817.67	17,462.35	22,355.32	0.00
116.0000	92532F100	VERTEX PHARMACEUTICALS INC	12/31/2007	10/27/2009	3,882.47	2,731.80	1,150.67	0.00
5.0000	928563402	VMWARE INC CLASS A	07/11/2008	08/20/2009	154.36	191.40	-37.04	0.00
8.0000	928583402	VMWARE INC CLASS A	10/14/2008	12/22/2009	338.49	175.60	162.89	0.00
213.0000	928583402	VMWARE INC CLASS A	11/26/2008	12/22/2009	9,012.22	4,129.01	4,883.21	0.00
2460.0000	H27013103	WEATHERFORD INTL LTD SEDOL B5KL6S7	12/15/2008	12/18/2009	41,634.42	25,376.38	16,258.04	0.00
55.0000	984851204	YARA INTERNATIONAL ADR	12/15/2008	12/18/2009	2,415.53	1,050.50	1,365.03	0.00
Total Long Term 15% Sales Reported on 1099-B					4,064,526.14	4,505,249.05	-440,722.91	0.00

Unknown Term (or Cost) Sales Reported on 1099-B

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2009 Tax Information Statement

Page 5 of 10

Account Number: 45460018124296
 Recipient's Tax ID number: XXX-XX-7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B								
1518.0000	922908595	VANGUARD SMALL CAP GROWTH ETF	03/08/2007	06/11/2009	74,622.96	101,546.79	-26,923.83	0.00
1028.0000	922908611	VANGUARD SMALL CAP VALUE ETF	03/08/2007	06/11/2009	46,135.45	73,528.73	-27,393.28	0.00
Total Long Term 15% Sales Reported on 1099-B					120,758.41	175,075.52	-54,317.11	0.00

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2009 Tax Information Statement

Account Number: 45460018124301
Recipient's Tax ID number: XXX-XX-7263
Payer's Federal ID number: 22-1146430
Questions? (800)932-5574 ext 1315

Payer's Name and Address
PNC BANK, N.A.
620 LIBERTY AVENUE-10TH FLOOR
PITTSBURGH, PA 15222-2705

☐ Corrected ☐ 2nd TIN notice

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B								
2365.0000	922042858	VANGUARD EMERGING MARKETS STOCK ETF	03/08/2007	05/21/2009	72,012.39	89,337.87	-17,325.48	0.00
Total Long Term 15% Sales Reported on 1099-B								
					72,012.39	89,337.87	-17,325.48	0.00

2009 Tax Information Statement

Account Number: 45460018124393
 Recipient's Tax ID number: XXX-XX-7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired (Box 1a)	Date of Sale (Box 2)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B								
2764.0000	464287481	ISHARES RUSSELL MIDCAP GROWTH INDEX FUND	03/08/2007	05/18/2009	96,350.56	146,591.72	-50,241.16	0.00
5886.0000	464287473	ISHARES TR RUSSELL MIDCAP VALUE INDEX FD	03/08/2007	05/18/2009	165,922.06	296,221.43	-130,299.37	0.00
Total Long Term 15% Sales Reported on 1099-B						442,813.15	-180,540.53	0.00

2009 Tax Information Statement

Account Number: 45460018124408
 Recipient's Tax ID number: XXX-XX-7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired (Box 1a)	Date of Sale (Box 2)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B 2731.0000	464287465	ISHARES TR MSCI EAFE INDEX FD	03/08/2007	04/13/2009	109,482.97	202,599.68	-93,116.71	0.00
Total Long Term 15% Sales Reported on 1099-B					109,482.97	202,599.68	-93,116.71	0.00

2009 Tax Information Statement

Account Number: 45460018124416
 Recipient's Tax ID number: XXX-XX-7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

☐ Corrected ☐ 2nd TIN notice

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B								
4701.0000	464287408	MFC ISHARES TR S&P 500 BARRA VALUE INDEX FUND	03/08/2007	10/12/2009	244,962.80	361,717.26	-116,754.46	0.00
Total Long Term 15% Sales Reported on 1099-B					244,962.80	361,717.26	-116,754.46	0.00

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2009 Tax Information Statement

Account Number: 45460018079223
 Recipient's Tax ID number: XXX-XX-7263
 Payer's Federal ID number: 22-1146430
 Questions? (800)932-5574 ext 1315
☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
 AUSHERMAN FAMILY FOUNDATION
 7420 HAYWARD ROAD SUITE 203
 FREDERICK, MD 21702-2509

Payer's Name and Address
 PNC BANK, N.A.
 620 LIBERTY AVENUE-10TH FLOOR
 PITTSBURGH, PA 15222-2705

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP (Box 5)	Description (Box 7)	Date Acquired (Box 1a)	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss (Box 4)	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
25000.0000	999530470	TEMPORARY ASSET FOR LP/LLC FUNDS PENDING UNIT/PRICE AND CUSIPS	03/05/2009	03/05/2009	25,000.00	25,000.00	0.00	0.00
Total Short Term Sales Reported on 1099-B					25,000.00	25,000.00	0.00	0.00

Ref: 00000056 00017462

AUSHERMAN FAMILY FOUNDATION
Account Number 22J-23602-15 CWM

Details of Short Term Gain (Loss) 2009

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor. For additional information regarding this section see enclosed brochure.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Original Cost Adjusted Cost	Original Gain/(Loss) Adjusted Gain/(Loss)	Ordinary Income Capital Gain/(Loss)
125000010	225,000	AMERICAN EXPRESS BAN DTD 10/20/2006 BANK NOTE DUE 10/20/2009 RATE 2.595	07/13/09	10/20/09	\$ 225,000.00	\$ 222,091.88 ^e \$ 222,091.88	\$ 2,908.12 \$ 2,908.12	\$ 2,908.12 \$ 0.00
Total					\$ 225,000.00	\$ 222,091.88 \$ 222,091.88	\$ 2,908.12 \$ 2,908.12	\$ 2,908.12 \$ 0.00

^e Based on information supplied by Client or other financial institution, not verified by us.

Details of Long Term Gain (Loss) 2009

This section shows your sales of securities during the year. The "Sale Proceeds" column excludes any accrued income you may have received. In addition, although cash in lieu less than \$20 is not included on Form 1099-B (if applicable), it is included in this section. Please note, this material is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor. For additional information regarding this section see enclosed brochure.

Reference number	Quantity	Security Description	Opening Trade Date	Closing Trade Date	Sale Proceeds	Original Cost Adjusted Cost	Original Gain/(Loss) Adjusted Gain/(Loss)	Ordinary Income Capital Gain/(Loss)
125000020	180,000	AMERICAN INTL GROUP INC GLOBAL NOTES BOOK/ENTRY DD 11/15/03 DUE 05/15/2013 RATE 4.250	Unavailable	09/01/09	\$ 135,675.00			

2009 YEAR END SUMMARY



FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MORGANSTANLEY SMITHBARNEY LLC	139,203.	0.	139,203.
PNC BANK	234,370.	3.	234,367.
TOTAL TO FM 990-PF, PART I, LN 4	373,573.	3.	373,570.

FORM 990-PF	OTHER INCOME	STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PENN SQ GLOBAL RE FUND I K-1	2,586.	2,586.	
PATRIOT CAPITAL II, LP	<9,178.>	<9,178.>	
BLACKROCK MULTI-MANAGER PTRS LLC	<28,912.>	<28,912.>	
ARTHUR STREET FUND IV, LP	1,325.	1,325.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<34,179.>	<34,179.>	

FORM 990-PF	LEGAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL	5,182.	0.		5,182.	
TO FM 990-PF, PG 1, LN 16A	5,182.	0.		5,182.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	8,586.	0.		8,586.
TO FORM 990-PF, PG 1, LN 16B	8,586.	0.		8,586.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT COUNSELING	1,400.	0.		1,400.
TO FORM 990-PF, PG 1, LN 16C	1,400.	0.		1,400.

FORM 990-PF	TAXES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	1,073.	1,073.		0.
PAYROLL TAXES	8,030.	0.		8,030.
TO FORM 990-PF, PG 1, LN 18	9,103.	1,073.		8,030.

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES	535.	0.		535.
TELEPHONE	1,584.	0.		1,584.
MEALS & ENTERTAINMENT	589.	0.		589.
ADVERTISING/PROMOTION	11,014.	0.		11,014.
INVESTMENT EXPENSES	35,356.	35,270.		0.
TEMPORARY HELP	230.	0.		230.

TRAVEL	2,165.	0.	2,165.
EDUCATION/TRAINING	3,473.	0.	3,473.
DUES & SUBSCRIPTIONS	2,500.	0.	2,500.
INVESTMENT EXPENSES FROM K-1	27,084.	27,084.	0.
MISCELLANEOUS EXPENSE	10,397.	0.	10,397.
TO FORM 990-PF, PG 1, LN 23	94,927.	62,354.	32,487.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MARKETABLE SECURITIES - PNC	FMV	5,647,165.	5,666,501.
PENN SQUARE GLOBAL RE FUND I, LP	FMV	88,176.	73,569.
PATRIOT CAPITAL II, LP	FMV	211,771.	225,000.
BLACKROCK MULTI-MANAGER PTRS LLC	FMV	550,924.	540,561.
INVESTMENTS - MSSB	COST	5,389,102.	5,550,575.
ARTHUR STREET FUND IV, LP	COST	92,399.	76,774.
TOTAL TO FORM 990-PF, PART II, LINE 13		11,979,537.	12,132,980.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 9
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MARVIN E. AUSHERMAN 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	DIRECTOR/PRESIDENT/TREASUR 3.00	0.	0.	0.
LISA S. AUSHERMAN 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	DIRECTOR/SECRETARY 3.00	0.	0.	0.
KARI A. AUSHERMAN 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	TRUSTEE 3.00	0.	0.	0.
JUSTIN E. AUSHERMAN 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	TRUSTEE 3.00	0.	0.	0.
J. BRIAN GAENG 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	TRUSTEE 3.00	0.	0.	0.
JAMES B. MACGILLIVRAY 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	TRUSTEE 3.00	0.	0.	0.
JOSEPH S. WELTY 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	TRUSTEE 3.00	0.	0.	0.
NORINE HAAS 7420 HAYWARD ROAD, SUITE 203 FREDERICK, MD 21702	FORMER EXECUTIVE DIRECTOR 20.00	41,945.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		41,945.	0.	0.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 10
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JOYCE HEPTNER, EXECUTIVE DIRECTOR, AUSHERMAN FAMILY FOUNDATION, INC.
7420 HAYWARD ROAD, SUITE 203
FREDERICK, MD 21702

TELEPHONE NUMBER

301-620-4443

FORM AND CONTENT OF APPLICATIONS

VISIT WWW.AUSHERMANFAMILYFOUNDATION.ORG, CHOOSE "GRANT APPLICATION", AND FOLLOW INSTRUCTIONS PROVIDED.

ANY SUBMISSION DEADLINES

SUBMISSIONS WILL BE REVIEWED BY THE PHILANTHROPIC COMMITTEE THAT MEETS SIX TIMES EACH YEAR

RESTRICTIONS AND LIMITATIONS ON AWARDS

GLOBAL FUNDS ARE AVAILABLE, BUT LIMITED. 90% OF THE FUNDS AVAILABLE MUST BENEFIT FREDERICK COUNTY, MD

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).	
Type or print File by the extended due date for filing the return. See instructions	Name of Exempt Organization	Employer identification number
	AUSHERMAN FAMILY FOUNDATION, INC.	20-4937263
	Number, street, and room or suite no. If a P.O. box, see instructions. 7420 HAYWARD ROAD, NO. 203	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions FREDERICK, MD 21702	

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

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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

RENEE LOPEZ

- The books are in the care of ☒ 7420 HAYWARD ROAD, SUITE 203 - FREDERICK, MD 21702
 Telephone No. ☒ 301-620-4464 FAX No ☒ 301-620-4473

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

- 4 I request an additional 3-month extension of time until NOVEMBER 15, 2010.
- 5 For calendar year 2009, or other tax year beginning _____, and ending _____
- 6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension _____

ADDITIONAL TIME IS REQUIRED TO COMPLETE A CORRECT AND ACCURATE RETURN.

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	6,537.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	20,429.
c	Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	\$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature Title Date