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Form **990-PF**Department of the Treasury  
Internal Revenue Service (77)**Return of Private Foundation**  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

OMB No 1545-0052

**2009**

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

For calendar year 2009, or tax year beginning , and ending

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation The Carl and Toby Sloane Family Foundation		A Employer identification number 20-5632178
	Number and street (or P O box number if mail is not delivered to street address) Room/suite c/o Foundation Source, 501 Silverside Road 123		B Telephone number (see page 10 of the instructions) (800) 839-1754
	City or town, state, and ZIP code Wilmington DE 19809-1377		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 2,113,087		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	48	48		
	4 Dividends and interest from securities	61,874	61,874		
	5 a Gross rents				
	b Net rental income or (loss)				
	6 a Net gain or (loss) from sale of assets not on line 10	37,909			
	b Gross sales price for all assets on line 6a 1,452,227				
	7 Capital gain net income (from Part IV, line 2)		37,909		
	8 Net short-term capital gain				
	9 Income modifications				
	10 a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	99,831	99,831			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16 a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	10,023	10,023		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	300			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	12,519			12,519
	24 Total operating and administrative expenses. Add lines 13 through 23	22,842	10,023		12,519
	25 Contributions, gifts, grants paid	500,355			500,355
26 Total expenses and disbursements. Add lines 24 and 25	523,197	10,023		512,874	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-423,366				
b Net investment income (if negative, enter -0-)		89,808			
c Adjusted net income (if negative, enter -0-)					

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.  
(HTA)

Form 990-PF (2009)

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<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
<b>Assets</b>	1 Cash—non-interest-bearing					
	2 Savings and temporary cash investments			795,284	377,407	377,407
	3 Accounts receivable <span style="float:right">▶</span> Less allowance for doubtful accounts <span style="float:right">▶</span>			3,167		
	4 Pledges receivable <span style="float:right">▶</span> Less allowance for doubtful accounts <span style="float:right">▶</span>					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)					
	7 Other notes and loans receivable (attach schedule) <span style="float:right">▶</span> Less allowance for doubtful accounts <span style="float:right">▶</span>					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10 a Investments—U S and state government obligations (attach schedule)			1,173,908	376,991	416,456
	b Investments—corporate stock (attach schedule)			490,275	1,284,870	1,319,224
	c Investments—corporate bonds (attach schedule)					
	11 Investments—land, buildings, and equipment basis <span style="float:right">▶</span> Less accumulated depreciation (attach schedule) <span style="float:right">▶</span>					
	12 Investments—mortgage loans					
	13 Investments—other (attach schedule)					
	14 Land, buildings, and equipment basis <span style="float:right">▶</span> Less accumulated depreciation (attach schedule) <span style="float:right">▶</span>					
15 Other assets (describe <span style="float:right">▶</span> )						
16 <b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)			2,462,634	2,039,268	2,113,087	
<b>Liabilities</b>	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable (attach schedule)					
	22 Other liabilities (describe <span style="float:right">▶</span> )					
	23 <b>Total liabilities</b> (add lines 17 through 22)			0	0	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <span style="float:right">▶</span> <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here <span style="float:right">▶</span> <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg, and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds			2,462,634	2,039,268	
30 <b>Total net assets or fund balances</b> (see page 17 of the instructions)			2,462,634	2,039,268		
31 <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions)			2,462,634	2,039,268		

**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	2,462,634
2 Enter amount from Part I, line 27a	2	-423,366
3 Other increases not included in line 2 (itemize) <span style="float:right">▶</span>	3	0
4 Add lines 1, 2, and 3	4	2,039,268
5 Decreases not included in line 2 (itemize) <span style="float:right">▶</span>	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	2,039,268

**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.)
<b>1a Publicly-traded Securities</b>	P	Various	Various
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			
(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)
<b>a</b> 1,452,227		1,414,318	37,909
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			
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	
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			
<b>2 Capital gain net income or (net capital loss)</b> { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			<b>2</b> 37,909
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).</b> If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8			<b>3</b>

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No  
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.**1** Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	331,090	2,247,586	0.147309
2007	351,508	2,845,948	0.123512
2006	5,900	373,381	0.015802
2005			0.000000
2004			0.000000
<b>2 Total of line 1, column (d)</b>			<b>2</b> 0.286623
<b>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</b>			<b>3</b> 0.095541
<b>4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5</b>			<b>4</b> 2,112,921
<b>5 Multiply line 4 by line 3</b>			<b>5</b> 201,871
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>			<b>6</b> 898
<b>7 Add lines 5 and 6</b>			<b>7</b> 202,769
<b>8 Enter qualifying distributions from Part XII, line 4</b> If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18			<b>8</b> 512,874

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	898	
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0	
3 Add lines 1 and 2		3	898	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	898	
6 Credits/Payments				
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	775		
b Exempt foreign organizations—tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	0		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d	7	775		
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	123		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	0		
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 0 Refunded	11	0		

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) DE		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <input type="checkbox"/> _____				
14	The books are in care of <input type="checkbox"/> c/o Foundation Source Telephone no <input type="checkbox"/> (800) 839-1754			
	Located at <input type="checkbox"/> 501 Silverside Road, Suite 123, Wilmington, DE ZIP+4 <input type="checkbox"/> 19809-1377			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year <input type="checkbox"/> 15			

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

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

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

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

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

☐ 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)? (see page 22 of the instructions)

☐ 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 page 22 of the instructions)?☐

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?☐ Yes ☒ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

☐ Yes ☒ No**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?**5b** N/A**6b** X**7b** N/A**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

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

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

**Part IX-A Summary of Direct Charitable Activities**

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

Expenses

1 NONE	
2	
3	
4	

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

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

Amount

1 NONE	
2	
All other program-related investments. See page 24 of the instructions.	
3	

Total. Add lines 1 through 3



0



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	1,739,150
<b>b</b>	Average of monthly cash balances	<b>1b</b>	405,947
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions)	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	2,145,097
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	2,145,097
<b>4</b>	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	32,176
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	2,112,921
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	105,646

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	105,646
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	898
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	898
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	104,748
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0
<b>5</b>	Add lines 3 and 4	<b>5</b>	104,748
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	104,748

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	<b>1a</b>	512,874
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	512,874
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	898
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	511,976

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				104,748
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			0	
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004				
<b>b</b> From 2005				
<b>c</b> From 2006				1,095
<b>d</b> From 2007				211,773
<b>e</b> From 2008				219,799
<b>f</b> Total of lines 3a through e	432,667			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 512,874				
<b>a</b> Applied to 2008, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
<b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
<b>d</b> Applied to 2009 distributable amount				104,748
<b>e</b> Remaining amount distributed out of corpus	408,126			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a) )	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	840,793			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0		
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	840,793			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005				0
<b>b</b> Excess from 2006				1,095
<b>c</b> Excess from 2007				211,773
<b>d</b> Excess from 2008				219,799
<b>e</b> Excess from 2009				408,126

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

**N/A**

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

<b>2 a</b>	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	<b>Tax year</b>	<b>Prior 3 years</b>			<b>(e) Total</b>
		<b>(a) 2009</b>	<b>(b) 2008</b>	<b>(c) 2007</b>	<b>(d) 2006</b>	
		0				0
<b>b</b>	85% of line 2a	0	0	0	0	0
<b>c</b>	Qualifying distributions from Part XII, line 4 for each year listed	0				0
<b>d</b>	Amounts included in line 2c not used directly for active conduct of exempt activities					0
<b>e</b>	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	0	0	0	0	0
<b>3</b>	Complete 3a, b, or c for the alternative test relied upon					
<b>a</b>	"Assets" alternative test—enter					
	(1) Value of all assets					0
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
<b>b</b>	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	0				0
<b>c</b>	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
	(3) Largest amount of support from an exempt organization					0
	(4) Gross investment income					0

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

## 1 Information Regarding Foundation Managers:

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

**Carl Sloane**

Toby Sloane

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

NONE

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

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

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

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

- c Any submission deadlines**

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i> SEE ATTACHMENT				
<b>Total</b>			<b>3a</b>	500,355
<b>b</b> <i>Approved for future payment</i> NONE				
<b>Total</b>			<b>3b</b>	





The Carl and Toby Sloane Family Foundation  
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**Form 990-PF, Part I, Line 16c – Other Professional Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
INVESTMENT MANAGEMENT SERVICES	\$10,023	\$10,023	-	\$0
TOTAL:	\$10,023	\$10,023	-	\$0

**The Carl and Toby Sloane Family Foundation**  
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**Form 990-PF, Part I, Line 18 – Taxes**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
ESTIMATED TAX FOR 2009	\$300	\$0	-	\$0
<b>TOTAL:</b>	<b>\$300</b>	<b>\$0</b>	<b>-</b>	<b>\$0</b>



The Carl and Toby Sloane Family Foundation  
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Form 990-PF, Part I, Line 23 – Other expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
ADMINISTRATIVE FEES	\$12,519	\$0	-	\$12,519
TOTAL:	\$12,519	\$0	-	\$12,519

The Carl and Toby Sloane Family Foundation  
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**Form 990-PF, Part II, Line 10b - Columns (b) & (c) - Investments: Corporate Stock**

Shares	Description/Symbol	Line 10b - Column (b) Book Value	Line 10b - Column (c) Fair Market Value
300	AVON PRODUCTS (AVP)	\$5,148 00	\$9,450 00
200	BRISTOL-MYERS SQUIBB CO (BMY)	\$4,088 00	\$5,050 00
200	BP P L C SPONSORED ADR (BP)	\$9,739 00	\$11,594 00
200	CATERPILLAR INC (CAT)	\$7,422 00	\$11,398 00
200	FPL GROUP INC (FPL)	\$9,070 00	\$10,564 00
200	INTEL CORP (INTC)	\$3,108 00	\$4,080 00
200	COCA-COLA CO (KO)	\$9,008 00	\$11,400 00
200	ELI LILLY & CO (LLY)	\$6,560 00	\$7,142 00
100	MCDONALD'S CORP (MCD)	\$5,384 00	\$6,244 00
100	MEDCO HEALTH SOLUTIONS INC (MHS)	\$6,078 00	\$6,391 00
8408	NORTHERN MULTI-MANAGER INTL EQUITY FUND (NMIEX)	\$75,000 00	\$75,084 07
12422	NORTHERN MULTI-MANAGER SMALL CAP FUND (NMMSX)	\$100,000 00	\$102,608 69
7198	NORTHERN EMERGING MARKETS EQUITY FD (NOEMX)	\$75,000 00	\$79,462 61
500	NOKIA (NOK)	\$5,470 00	\$6,425 00
200	NUCOR CP (NUE)	\$7,524 00	\$9,330 00
200	PHILIP MORRIS INTL (PM)	\$8,439 00	\$9,638 00
200	ROYAL DUTCH SHELL PLC (RDS-A)	\$10,711 00	\$12,022 00
200	TARGET CORPORATION (TGT)	\$7,856 00	\$9,674 00
200	TJX COMPANIES INC (TJX)	\$5,424 00	\$7,310 00
100	UNITED TECHNOLOGIES CORP (UTX)	\$5,224 00	\$6,941 00
200	V F CORP (VFC)	\$10,738 00	\$14,648 00
	<b>TOTAL</b>	<b>\$376,991</b>	<b>\$416,456</b>

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Form 990-PF, Part II, Line 10c - Columns (b) & (c) - Investments: Corporate Bonds

Shares	Description/Symbol/CUSIP Number	Line 10c - Column (b) Book Value	Line 10c - Column (c) Fair Market Value
200000	ABBOTT LABS NTS - 5.600% - 05-15-2011 (002824AS9)	\$212,698.50	\$212,126.00
200000	CISCO SYSTEMS INC 5.25% 02/22/11 (17275RAB8)	\$208,972.00	\$209,866.00
50000	JOHN DEERE CAPITAL CORP NT MTN 4.95% 12/1/12 (24422EQM4)	\$47,300.00	\$53,621.50
50000	WALT DISNEY CO NTS - 6.3750% - 03/01/2012 (25468PBX3)	\$50,791.00	\$54,750.00
100000	GOLDMAN SACHS GROUP INC NOTE DTD 8/27/2002 5.7% 9/1/2012 (38141GCG7)	\$92,321.00	\$107,541.00
200000	JP MORGAN CHASE & CO NOTE DTD 11/7/2003 4.5% 11/15/2010 (46825HBA7)	\$204,838.50	\$205,636.00
50000	NUCOR CORP NOTE 05.00000% 06/01/2013 MAKE WHOLE (670348AJ4)	\$47,737.00	\$53,005.50
200000	SBC COMMUNICATIONS INC NOTE DTD 11/14/2005 5.3% 11/15/2010 (78387GAS2)	\$207,450.50	\$207,908.00
200000	WALGREEN CO NOTES 04.87500% 08/01/2013 (931422AD1)	\$212,761.00	\$214,770.00
	<b>TOTAL</b>	<b>\$1,284,870</b>	<b>\$1,319,224</b>

**The Carl and Toby Sloane Family Foundation**  
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**Form 990-PF, Part VIII, Line 1 - List all foundation 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
Carl Sloane c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	Co-President / Director / Secretary <1 hour(s) per week	\$0 00	\$0 00	\$0 00
Amy Sloane c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	Vice President / Director <1 hour(s) per week	\$0 00	\$0 00	\$0 00
Lisa Sloane c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	Vice President / Director <1 hour(s) per week	\$0 00	\$0 00	\$0 00
Todd C. Sloane c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	Vice President / Director <1 hour(s) per week	\$0 00	\$0 00	\$0 00
Toby Sloane c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	Co-President / Director <1 hour(s) per week	\$0 00	\$0 00	\$0 00

**The Carl and Toby Sloane Family Foundation**  
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**Taxable Year Ending December 31, 2009**

**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

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
AD LIB INC 215 NORTH ST, PITTSFIELD, MA 01201	N/A	509(a)(1)	DROP IN CENTER PROGRAM	\$500.00
BERKSHIRE COUNTRY DAY SCHOOL INC PO BOX 867, LENOX, MA 01240	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$100.00
BETH ISRAEL DEACONESS MEDICAL CENTER INC 330 BROOKLINE AVE, NUMBER STREET SUITE OR, MA 02215	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$75,000.00
BETH ISRAEL DEACONESS MEDICAL CENTER INC 330 BROOKLINE AVE, NUMBER STREET SUITE OR, MA 02215	N/A	509(a)(1)	CAPITAL CAMPAIGN	\$74,410.00
BROWN UNIVERSITY PROVIDENCE 164 ANGELL STREET, PROVIDENCE, RI 02912	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$200.00
COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON INC 126 HIGH STREET, BOSTON, MA 02110	N/A	509(a)(1)	ANNUAL CAMPAIGN DIVISION	\$48,644.64
COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON INC 126 HIGH STREET, BOSTON, MA 02110	N/A	509(a)(1)	BIRTHRIGHT ISRAEL DIVISION	\$25,000.00
CONGREGATION SHIRAT HAYAM OF THE NORTH SHORE 55 ATLANTIC AVENUE, SWAMPSCOTT, MA 01907	N/A	509(a)(1)	CAPITAL CAMPAIGN	\$60,000.00

**The Carl and Toby Sloane Family Foundation**  
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

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
DOUG FLUTIE JR FOUNDATION FOR AUTISM INC 615 CONCORD STREET, FRAMINGHAM, MA 01702	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$200 00
ELI & BESSIE COHEN HILLEL ACADEMY 6 COMMUNITY RD, MARBLEHEAD, MA 01945	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$25,000 00
ETHEL WALKER SCHOOL INC 230 BUSHY HILL RD, SIMSBURY, CT 06070	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$200 00
FLYING CLOUD INSTITUTE INC 731 S SANDISFIELD RD, NEW MARLBOROUGH, MA 01230	N/A	509(a)(2)	LEE ELEMENTARY SCHOOLS PROGRAMS	\$250 00
FRIENDS OF FONDATION DE FRANCE INC 6 W 48TH ST FL 10, NEW YORK, NY 10036	N/A	509(a)(1)	ECOLE ALSACIENNE, PARIS, FRANCE FUND	\$5,000 00
HEVREH OF SOUTHERN BERKSHIRE INC 270 STATE RD, GT BARRINGTON, MA 01230	N/A	509(a)(1)	L'DOR V'DOR FUND	\$1,250 00
HILLEL THE FOUNDATION FOR JEWISH CAMPUS LIFE 52 MT AUBURN ST, CAMBRIDGE, MA 02138	N/A	509(a)(1)	CAPITAL CAMPAIGN	\$25,000 00
JEWISH FAMILY SERVICE OF THE NORTH SHORE INC 2 EAST INDIA SQ MALL, SALEM, MA 01970	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$10,000 00

**The Carl and Toby Sloane Family Foundation**  
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

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
JEWISH FEDERATION OF THE BERKSHIRES INC 196 SOUTH ST, PITTSFIELD, MA 01201	N/A		509(a)(1)	GENERAL & UNRESTRICTED	\$250 00
JEWISH FEDERATION OF THE NORTH SHORE INC 2 EAST INDIA SQUARE STE 200, SALEM, MA 01970	N/A		509(a)(1)	JEWISH COMMUNITY TASK FORCE DIVISION	\$25,000 00
JEWISH FEDERATION OF THE NORTH SHORE INC 2 EAST INDIA SQUARE STE 200, SALEM, MA 01970	N/A		509(a)(1)	JEWISH COMMUNITY TASK FORCE PROJECT	\$25,000 00
JOHN F KENNEDY SCHOOL OF GOVERNMENT OFFICE OF EXTERNAL AFFAIRS, CAMBRIDGE, MA 02138	N/A		509(a)(1)	GENERAL & UNRESTRICTED	\$500 00
LITERACY NETWORK OF SOUTH BERKSHIRE INC 100 MAIN ST, LEE, MA 01238	N/A		509(a)(1)	GENERAL & UNRESTRICTED	\$500 00
MUSEUM OF FINE ARTS 465 HUNTINGTON AVE, BOSTON, MA 02115	N/A		509(a)(1)	GENERAL & UNRESTRICTED	\$250 00
NEWTON GIRLS SOFTBALL INC 22 OAKWOOD RD, NEWTON, MA 02460	N/A		509(a)(2)	GENERAL & UNRESTRICTED	\$500 00
PAN MASSACHUSETTS CHALLENGE TRUST 77 4TH AVE, NEEDHAM, MA 02494	N/A		509(a)(1)	GENERAL & UNRESTRICTED	\$200 00

**The Carl and Toby Sloane Family Foundation**  
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

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
PINGREE SCHOOL INC 537 HIGHLAND ST, S HAMILTON, MA 01982	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$200 00
PRESIDENT AND FELLOWS OF HARVARD COLLEGE 1350 MASSACHUSETTS AVE RM 480, CAMBRIDGE, MA 02138	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$25,000 00
RAIDERS SOFTBALL INC 91 WOODLAWN ST, LYNN, MA 01904	N/A	509(a)(2)	GENERAL & UNRESTRICTED	\$650 00
RHODE ISLAND SCHOOL OF DESIGN 2 COLLEGE ST, PROVIDENCE, RI 02903	N/A	509(a)(1)	ARCHITECTURE ALUMNI TRAVEL AWARD PROGRAM	\$500 00
SIMMONS COLLEGE 300 THE FENWAY, BOSTON, MA 02115	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$35,000 00
SIMMONS COLLEGE 300 THE FENWAY, BOSTON, MA 02115	N/A	509(a)(1)	SIMMONS COLLEGE HILLEL FUND	\$25,000 00
SIMMONS COLLEGE 300 THE FENWAY, BOSTON, MA 02115	N/A	509(a)(1)	TOBY M SLOANE TERM FUND FOR HILLEL'S ADMINISTRATIVE AND PROGRAMMATIC NEEDS FOR THE 2009-2010 YEAR	\$8,500 00
ST GEORGE'S EPISCOPAL CHURCH 20 FRANKLIN STREET, LEE, MA 01238	N/A	509(a)(1)	FOOD PANTRY PROGRAM	\$500 00



**The Carl and Toby Sloane Family Foundation**  
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

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
THE BERKSHIRE TACONIC COMMUNITY FOUNDATION INC 271 MAIN ST, GREAT BARRINGTON, MA 01230	N/A	509(a)(1)	LEE EDUCATIONAL ENRICHMENT FUND	\$1,000 00
TOWER SCHOOL IN MARBLEHEAD INC 75 W SHORE DR, MARBLEHEAD, MA 01945	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$100 00
VOLUNTEERS IN MEDICINE BERKSHIRES INC 777 MAIN ST STE 4, GT BARRINGTON, MA 01230	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$250 00
WARD AFTER-SCHOOL PROGRAM INC 10 DOLPHIN RD, NEWTON CENTER, MA 02459	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$200 00
WEST SUBURBAN Y M C A 276 CHURCH ST, NEWTON, MA 02458	N/A	509(a)(2)	GENERAL & UNRESTRICTED	\$500 00
TOTAL:				\$500,355