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Form 990-PF

Department of the Treasury

Return of Private Foundation

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

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

OMB No 1545-0052

-	.c.iia	I I WACIII	de Service				, ,		
For calendar year 2009, or tax year beginning , and ending									
G	Ch	eck all	that apply Initia	al return		rmer public charity		Final return	
_			Ame	ended return	Address chang	ge	Name	e change	
U	lse 1	he IRS	Name of foundation				A E	mployer identification	number
í		bel. rwise,	Hegardt Foun	dation				20-5814715	
•		rint	Number and street (or P O box		livered to street address)	Room/suite	_	elephone number	
		type.	500 IDS Cent	er, 80 S.	8th Street			612-632-30	00
		pecifi	City or town, state, and ZI					exemption application is p	
Ir	ıstru	ctions	Minneapolis,		2			· Foreign organizations	
Н	Ch	eck tvr			empt private foundation		— 2.	Foreign organizations me check here and attach co	eting the 85% test,
ï	Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation								
1	Fair		et value of all assets at end o		1	Accrual		private foundation stat nder section 507(b)(1)	
			t II, col. (c), line 16)	· 1 —	her (specify)		ĺ		• •
	(#O				mn (d) must be on cash b	pasis)	_ , ,,	the foundation is in a 6 nder section 507(b)(1)	
	****				(a) Revenue and	(b) Net investment	 "	(c) Adjusted net	(d) Disbursements
L	al	۾ ڪھ	inalysis of Revenue and Exp The total of amounts in columns (to ecessarity equal the amounts in co	o), (c), and (d) may not	expenses per books	income		income	for chantable purposes (cash basis only)
-	Т		ontributions, gifts, grants, etc		401,113.			N/A	100011 20010 011137
			eck		101/110	······································	_		
		n Int	erest on savings and temporary	required to attach out to		· · · · · · · · · · · · · · · · · · ·	_	······································	
		o ca	sh investments vidends and interest from se	curities	1,621.	1,621	1.		Statement 1
₹				Culling	1,021.		+	······································	
Z = 1			oss rents						
3			t rental income or (loss)			- H-Marten			**************************************
 ⊘	ē	_ Gr	t gain or (loss) from sale of assets oss sales price for all	s not on line 10					
∜	Revenue	D as:	sets on line 6a	4 1 2)) .	· · · · · · · · · · · · · · · · · · ·	
<u> </u>	8		pital gain net income (from Part N	/, iine 2)				·····	
5			et short-term capital gain				 -		
)		. Gr	come modifications oss sales less returns						
0			d allowances					· · · · · · · · · · · · · · · · · · ·	
,			ss Cost of goods sold						
:			oss profit or (loss)	}		1			
			her income	ł	402,734.	1,62		····	
-	_		otal. Add lines 1 through 11	American str	0.		5.	<u> </u>	0.
			empensation of officers, directors,	· · · · · · · · · · · · · · · · · · ·	0.	··	-		•
			her employee salaries and w insion plans, employee bene	-					
	S			Stmt 2	1,866.	().		1,866.
			gal fees counting fees	2 Cin C 2	1,000		-		
	χĎ		her professional fees	ŀ	,			=	
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	ē (inting and publications her expenses	Stmt 4	31,229.) .		31,229.
:	<u>. [څ</u>		ner expenses Ital operating and administr	1	01/225		-		
	era (penses. Add lines 13 throug	· · · · · · · · · · · · · · · · · · ·	33,208.	(o .		33,208.
(히.		potributions, gifts, grants pai	•	165,000.		-		165,000.
_					100,000	***************************************			
	K	E	tal expenses and disburser	nome.	198,208.	(o .		198,208.
Ī		27 Su	obtract line 26 from line 12						
31			cos de rezentis over expenses ar	nd disbursements	204,526.				
δÌ	"	b Ne	et investment income i nega	itive, enter -0-)		1,62	1.		
L	+	E, Ad	justed net income (if negative					N/A	
92	350	1 3			Act Notice see the instruct	lone			Form 990-PF (2009)

Part III Analysis of Changes in Net Assets or Fund Balances

27 Capital stock, trust principal, or current funds

31 Total liabilities and net assets/fund balances

30 Total net assets or fund balances

28 Paid-in or capital surplus, or land, bldg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds

1 Total net	issets or fund balances at beginning of year - Part II, column (a), line 30			
(must agr	ee with end-of-year figure reported on prior year's return)	1	458,1	61.
-	unt from Part I, line 27a	2	204,5	26.
3 Other incr	eases not included in line 2 (itemize)	3		0.
4 Add lines	1, 2, and 3	4	662,6	87.
5 Decreases	not included in line 2 (itemize)	5		0.
	issets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	662,6	87.

Form **990-PF** (2009)

458,161.

538,161.

662,687.

662,687.

(a) List and desc 2-story brick wa	ribe the ki arehouse,	nd(s) of property sold (e g or common stock, 200 sh	, real estate, s MLC Co)		` P	- Purci - Dona		(c) Date (mo , c	acquired lay, yr)	(d) Date sold (mo , day, yr)
<u>1a</u>	NIE				-					
	NE				-					
d										
в								-		
(e) Gross sales price	(f) l	Depreciation allowed (or allowable)	, ,,,,	st or other basis expense of sale					iain or (loss s (f) minus	
a		···								
<u>b</u>										
<u>C</u>	_						_ 		<u> </u>	
<u>d</u> e				· •						-
Complete only for assets shown	ng gain in	column (h) and owned by	the foundation	on 12/31/69			()) Gains (0	Col (h) gain	minus
(i) F M V as of 12/31/69	T	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col (i) col (j), if any				(k), but	not less that (from col. (n -0-) or
a										
b										
C										
d			ļ			-				
8	ļ									·
2 Capital gain net income or (net ca	apital loss)	If gain, also enter If (loss), enter -0	r in Part I, line - in Part I, line	7 7	}	2				
3 Net short-term capital gain or (lo If gain, also enter in Part I, line 8,	column (d		nd (6)		}	•				
If (loss), enter -0- in Part I, line 8 Part V Qualification U	Inder S	ection 4940(e) for	Reduced	Tax on Net	Inv	estr	ent Inc	ome		
If section 4940(d)(2) applies, leave t Was the foundation liable for the sec If "Yes," the foundation does not qua	tion 4942 lify under	tax on the distributable an section 4940(e). Do not co	mplete this pa	ırt						Yes X No
1 Enter the appropriate amount in	each colui	mn for each year, see instr	uctions before	making any entri				_		(d)
(a) Base period years Calendar year (or tax year beginni	ing in)	(b) Adjusted qualifying dis		Net value of no	(c) oncha	ritable-			Distrit (col (b) div	oution ratio vided by col. (c))
2008		40	6,573. 6,512.				0,972 2,393			.965796 .787033
2007		20	0,312.			20	2,393			. 101033
2006 2005										
2004		· · · · · · · · · · · · · · · · · · ·						+		
2 Total of line 1, column (d)								2		1.752829
3 Average distribution ratio for the	5-year bas	se period - divide the total	on line 2 by 5,	or by the number	r of ye	ars				026415
the foundation has been in existe	nce if less	than 5 years						3	_	.876415
4 Enter the net value of noncharital	ble-use as	sets for 2009 from Part X,	line 5					4		444,553.
5 Multiply line 4 by line 3								5		389,613.
6 Enter 1% of net investment incor	ne (1% of	Part I, line 27b)						6		16.
7 Add lines 5 and 6								7		389,629.
8 Enter qualifying distributions from	n Part XII,	line 4						8		198,208.
If line 8 is equal to or greater that See the Part VI instructions	n line 7, ch	neck the box in Part VI, line	1b, and comp	plete that part usin	ng a 1	% tax (rate			

Bax Sempt operating boundations described in section 4940(a), 4940(b), 4940(e), or 4948 - see instructions) Its Sempt operating boundations described in section 4940(a) requirements in Part V, clinic in secsions 4940(a) and a since it is a second 4940(a) requirements in Part V, clinic heaves yet littled in secsions 4940(a) and since it is a second 4940(a) requirements in Part V, clinic heaves here is an advantage of Part I, line 12, cot (b) 2		m 990-PF (2009) Hegardt Foundation			5814			Page 4
Dates of ruling or determination letter (attach copy of latter if inecessary-see instructions) b Domestic foundations that meet the section 4940(e) requirements in Part V, check here	_		, or 4	948	- see i	nstru	ıctio	ns)
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶	18							
and other domestic boundstions enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, cot (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter 40-) 3 Add lines 1 and 2 3 Add lines 1 and 2 4 O. 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter 40- 5 Tax due. If the total of lines 5 and 8 so more than line 10 if 6-orm 8080) 6 Extend of the total of lines 5 and 8 more than line 7 enter amount owed 8 Tax due. If the total of lines 5 and 8 more than line 7 enter amount owed 9 Tax due. If the total of lines 5 and 8 more than line 7 enter amount owed 9 Tax due. If the total of lines 5 and 8 more than line 7 enter amount owed 9 Tax due. If the total of lines 5 and 8 more than line 7 enter amount owed 9 Tax due. If the total of lines 5 and 8 more than line 7 enter amount owed 9 Tax due. If the total of lines 5 and 8 more than line 7 enter amount owed 10 Overpayment 1 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 before the amount overpaid 12 Enter the amount of line 10 to be Credited to 2010 estimated tax or local legislation or due to particular or line 100 before 10 to 10		Date of ruling or determination letter (attach copy of letter if necessary-see instructions)						
e. All other domestic boundations enter 2% of time 27b. Exempt froregon organizations enter 4% of Part I, lime 12, coil (b) 2	- 1	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 📖 and enter 1%	>	1		,,,		<u>32.</u>
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 0 3 3 3 2 4 0 5 Tax based on Investment income. Subtract line 4 from line 3 if zero or less, enter-0- 5 Greddin-Pyrments a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - Lax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroreously withheld 7 Total credits and payments. Add lines 6a through 60 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 hine 7, enter amount owed 10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the 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 2019 satinated tax. Part VII-A Statements Regarding Activities 1a Dumig the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any potential and payments. Part VII-A Statements Regarding Activities 1a Dumig the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any potential and payments. Part VII-A Statements Regarding Activities 1 Dumig the tax year, did the foundation are connection with the activities. 1 Dumig the tax year, did the foundation are connection with the activities and copies of any maternals published or distributed by the foundation in connection with the activities. 1 Dumig the tax year, did the foundation of more did 1 participate or intervene in any past by the foundation of the activities. 2 Dumig the tax of the section of the activities. 3 Dumig the tax of the section of the activities. 4 Dumig the tax of the section of the activities. 5 Dumig the tax of the section of the activities. 5		of Part I, line 27b						
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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	4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4				
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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 5a and 8 through 6d 8 Entire any penalty for underpayment of estimated tax. Check here	6	Credits/Payments						
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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?, enter amount owed 10 Overpayment filline? 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. Refunded 11 1 Part VII-A Statements Reparding Activities 12 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 10 Dut it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Ves" 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. 2 Did the foundation file Form 1120-PDL for this year? 3 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation P \$ 0_2 (2) On toundation managers P \$ 0_2 2 Has the foundation mapaged in any activities that have not previously been reported to the IRS? 1 H"Yes," "attach a detailed description of the activities. 3 Has the foundation mapaged in any activities that have not previously been reported to the IRS? 4 Did the foundation have discribed business gross income of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either 9 By language in the governing instrument? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 11 "Yes," complete Part II, coil. (c), and Part XV 12 Enter the states to which the foundation furnished a copy of Form 990-PF to the Altoring General (or des	(I Backup withholding erroneously withheld 6d 6d						_
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment If line 10 to be Credited to 2010 estimated tax ▶ Refunded ▶ 11 Enter the amount of line 10 to be Credited to 2010 estimated tax ▶ Refunded ▶ 11 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 if participate or intervene in any political campagin? b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for definition)? 1a				7			_	<u> </u>
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 ▶ Refunded ▶ 11 Part VII-A Statements Regarding Activities	8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached						
Part VIII-A Statements Regarding Activities	9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed						<u>32.</u>
Part VII-A Statements Regarding Activities	10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10				
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? 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. Did the foundation file Form 1120-PDL for this year? 10 On the foundation file Form 1120-PDL for this year? 11 On the foundation \$ 0 . (2) On foundation managers \$ 0 . Enter the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0 . 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 A bas the foundation have unrelated business gross income of \$1,000 or more during the year? If "Yes," has it filed a lax return on Form 990-T for this year? N/A Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T A ret 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, 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? 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 Be Enter the states to which the foundation runshed a copy of Form 990-PF to the Attorney General (or designate) of each state as r			ed 🕨	11	L			
any political campaign? b Old 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-PQL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation						1	1.4	
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. Did the foundation file Form 1120-P0L for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \(\)	18	· · · · · · · · · · · · · · · · · · ·	tervene	ın		<u> </u>	Yes	
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to 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 (i) 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? ff "Yes," attach the statement required by General Instruction T A rethe requirements of section 509(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, 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? If "Yes," complete Part II, col. (c), and Part XV Ba Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MN 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 XI			ıblishe	d or				
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year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV	Q		for cale	ndar			·	
	•					g		Х
	10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresse	<u>.</u> S	t mt	. <u>5</u>	10	Х	

Fa	1990-PF(2009) Hegardt Foundation	20-581	1715		Page 5
	1990-PF (2009) Hegardt Foundation art VII-A Statements Regarding Activities (continued)	20-361	4/13		- age c
	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		1	Г —	
11	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		<u>''</u>		
12	August 17, 2008?		12]	x
12	Did the foundation comply with the public inspection requirements for its annual returns and exemption application	n?	13	X	<u> </u>
13	Website address ► N/A				
14	The books are in care of ▶ W. Gordon Harris	Telephone no ▶505-8	320-7	797	
• •	Located at ▶551 W Cordova Rd, #116, Santa Fe, NM	ZIP+4 ▶8	7505		
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	/ <u>A</u>	
P	art VII-8 Statements Regarding Activities for Which Form 4720 May Be Requ	uired			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
18	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No	ĺ		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)				
	a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No	-		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available		ļ		
	for the benefit or use of a disqualified person)?	Yes X No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"				
	if the foundation agreed to make a grant to or to employ the official for a period after	[
	termination of government service, if terminating within 90 days)	Yes X No	1		
ı	o If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations				
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	N/A ▶□	1b		ļ
	Organizations relying on a current notice regarding disaster assistance check here				
(Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were no	ot corrected	40		Х
	before the first day of the tax year beginning in 2009?	ina faundation	10		A
Z	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operate defined in section $4942(j)(3)$ or $4942(j)(5)$)	ing roundation	[
	to the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax y	ear/e) hearnaina			
•	before 2009?	Yes X No			
	If "Yes," list the years ▶	100 () 110			
	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relat	ting to incorrect			
•	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer				
	statement - see instructions)	N/A	2b		Ì
	: If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here				
•	>				
38	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time				
	during the year?	Yes X No			
t	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualr	fied 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,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form 4720, to determine if the foundation had excess business holdings in 2009)

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

Form **990-PF** (2009)

X

3b

4a

N/A

orm 990-PF (2009) Hegardt Foundation			20-58147	15	Page 6
Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to	· · · · · · · · · · · · · · · · · · ·				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Ye	s X No		
(2) Influence the outcome of any specific public election (see section 4955), o		ectiv.			
any voter registration drive?	, , , , , , , , , , , , , , , , , , , ,		s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	2		s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization			,,, (22)		
• • • • • • • • • • • • • • • • • • • •	ii described iii section		es X No		
509(a)(1), (2), or (3), or section 4940(d)(2)?			S A NU		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or i		┌┰		
the prevention of cruelty to children or animals?			s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described i	n Regulations	27./2		1
section 53 4945 or in a current notice regarding disaster assistance (see instru	ictions)?		N/A !	5b	ļ
Organizations relying on a current notice regarding disaster assistance check h	ere				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it mainta	med			
expenditure responsibility for the grant?	N	I/A	s L No		
If "Yes," attach the statement required by Regulations section 53 494	5-5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				
a personal benefit contract?		Ye	s X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			5b	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 s	helter transaction?	☐ Ye	s X No		
b If yes, did the foundation receive any proceeds or have any net income attribut				7b	
Information About Officers Directors Trust		nagers Highly		<u> </u>	
Part VIII Paid Employees, and Contractors	ees, i oundation wa	inagers, riigini	,		
List all officers, directors, trustees, foundation managers and their	compensation.			•	
213. 21. 21. 21. 21. 21. 21. 21. 21. 21. 21	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans	(e) Exp	oense
(a) Name and address	hours per week devoted	(If not paid,	and deterred	account	t, other
Complement Cundanian	to position President	enter -0-)	compensation	allowa	inces
Carolyn H. Sundquist	President				
500 IDS Center, 80 S. 8th St.	1 00		ا م		^
Minneapolis, MN 55402	1.00	0.	0.		0.
Marjorie E. Harris	Vice-Presiden	it.			
500 IDS Center, 80 S. 8th St.					_
Minneapolis, MN 55402	1.00	0.	0.		0.
	Secretary				
500 IDS Center, 80 S. 8th St.					
Minneapolis, MN 55402	1.00	0.	0.		0.
W. Gordon Harris	Treasurer				
500 IDS Center, 80 S. 8th St.					
Minneapolis, MN 55402	1.00	0.	0.		0.
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."	-		
4. N	(b) Title, and average		(d) Contributions to employee benefit plans	(e) Expaccion	pense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deterred compensation	account	., other inces
N/A					
	0.00	0.	0.		0.
		-			
	1				
		 		_	
	1				
		-	 		
	{				
	l	l	L		
Total number of other employees paid over \$50,000			<u> </u>		0
			Form	990-PF	(2009)

Form **990-PF** (2009)

0.

3 N/A

Total. Add lines 1 through 3

All other program-related investments. See instructions

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	<u>0.</u> 451,323.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	451,323.
е	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	451,323.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,770.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	444,553.
6	Minimum Investment return. Enter 5% of line 5	6	22,228.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	id certain	
1	Minimum investment return from Part X, line 6	1	22,228.
2a	Tax on investment income for 2009 from Part VI, line 5		
	Income tax for 2009 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	32. 22,196.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	22,196.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	22,196.
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	22,196.
	art XII Qualifying Distributions (see Instructions)	· · · · · · · · · · · · · · · · · · ·	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	198,208.
	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 chantable projects that satisfy the	-	
-	Suitability test (prior IRS approval required)	3a	
	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	198,208.
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	198,208.
-	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years	qualifies fo	

Form **990-PF** (2009)

Page 9

Part XIII Undistributed Income (see instructions)

final amount appears in column (d), the same amount must be shown in column (a)		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
2 Undistributed ensown, it say, so of the end of 2000 at a finite amount for 2008 only a finite amount for 2008 only a finite 2009 only only only only only only only only					22,196.
a Exters amount for 2008 only b Total for prior years ■ Excess distributions carryover, if any, to 2009 a From 2006 ■ From 2006 ■ From 2008 ■ 193,625. ■ From 2008 ■ 193,625. ■ From 2008 ■ 198,750. ■ Total tol lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4 ★ \$ 198,208. ■ Applied to 2008, but not more than line 2a ■ Applied to 2008, but not more than line 2a ■ Applied to 2009, but not more than line 2a ■ Applied to 2009 distributibuted amount of prior years (Election required - see instructions) ■ Applied to 2009 distributibuted amount ■ Fehramian parinout distributed or to cropus (Election required - see instructions) ■ Applied to 2009 distributibuted amount ■ Fehramian parinout distributed or to cropus (Election required - see instructions) ■ Applied to 2009 distributibuted amount ■ Fehramian parinout distributed or to cropus (Election required - see instructions) ■ Applied to 2009 distributibuted amount ■ Fehramian parinout distributed or to cropus (Election required - see instructions) ■ Applied to 2009 distributibution amount must be allowed as distributed income subtract line 4 bronn ine 2 b ■ Center than artial oil each cholum as indicated below: 755,387. 755,387. 0 . 176,012. 176,012. 176,012. 176,012. 176,012. 176,012. 0 . 0 . 0 . 0 . 0 . 0 . 0 . 0					
B Total for pnor years 3 Excess distributions carryover, if any, to 2009 a From 2005 c From 2006 d From 2007 193,625 e From 2008 1 Total of lines 3 a through e 4 Qualifying distributions for 2009 from Part XII, in a 4 Ps. 198, 208 Applied to 2008, but not more than line 2a D Applied to 2008, but not more than line 2a D Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 subtributible amount e Remaining amount distributed out of corpus 5 Excess destributions carryover applied to 2009 5 Excess destributions and the state of the s	-			0.	
Sixcass distributions carryover, if any, to 2009 a From 2004 b From 2005 a From 2006 a From 2007 193,625 a From 2008 385,750 1 Total of lines 3a through e 4 Oualitying distribution for 2009 from Part XII, line 4 ► \$ 198,208 a Appled to 2008, but not more than line 2a b Appled to 10 instituted ancome of pror years (Election required - see instructions) 6 Treated as distributions out of corpus (Election required - see instructions) 6 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 6 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 6 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 7 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 6 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 7 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 8 Enter the net total of each column as indicated below: 7 Appled to 2009 distributions carryover applied to 2009 (Election required - see instructions) 9 Enter the amount of prony years (Indistributed incomes Subtract line 4 from line 2 b Taxable amount - see instructions) 9 Lindistributed incomes for 2008 Subtract line 4 from line 2 Taxable amount - see instructions 9 Lindistributed incomes for 2008 Subtract line 4 from line 2 Taxable amount - see instructions 9 Lindistributed incomes for 2008 Subtract line 4 from line 2 Taxable amount - see instructions 9 Lindistributed incomes for 2008 Subtract line 4 from line 2 Taxable amount - see instructions 9 Lindistributed incomes for 2008 Subtract line 4 from line 2 Taxable amount - see instructions 9 Lindistributed incomes for 2009 Subtract line 4 from line 2 from line 3 from 1 This amount must be distributions carryover from 2004 9 Excess distributions carryove	· · · · · · · · · · · · · · · · · · ·		+h-hHimmon adda Hadallan aras		, , , (, , , , , ,) , , , , , , , , , , , ,
3 Excess distributions carryover, if any, to 2009 a From 2004 b From 2005 c From 2006 f From 2006 f From 2007	L Total for prior yours		0.		
b From 2005 c From 2006 d From 2007 d From 2008 1	1 '		······································		
C From 2006 193,625 From 2008 193,625 From 2008 193,625 From 2008 385,750 17 tall of lines 34 through e 4 Dualifying distributions for 2009 from Part XII, line 4 ▶ \$ 198,208 0.					
d From 2007					
From 2008					
f Total of lines 3a through e 4 Ouslying distributions for 2009 from Part XII, line 4 ≥ \$ 198,208. a Applied to 2008, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carpover expend to 2009 fff an amount separar in column (ii) 5 Excess distributions acropive applied to 2009 fff an amount separar in column (iii) 6 Enter the net total of each column as indicated below: a Corpus Add lines (if, et, and 4e Subtract line 5 b Prior years' undistributed income for which a notice of distincincy has been issued, or on which the section 494(2) tax has been previously assessed 5 Undistributed income for 2008 Subtract lines 4 and 5 from line 1 This amount must be distributed income for 2008 Subtract lines 4 and 5 from line 1 This amount must be distributed income for 2009 Subtract lines 4 and 5 from line 1 This amount must be distributed income for 2009 Subtract lines 4 and 5 from line 1 This amount must be distributed income for 2009 Subtract lines 4 and 5 from line 1 This amount must be distributed income for 2009 Subtract lines 4 and 5 from line 1 This amount must be distributions carryover from 2004 0 . Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess from 2005 because from 2005 because from 2006					
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d Subtract line 6c from line 6b Taxable amount - see instructions B Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously		0.		
amount - see Instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 755,387.		······			
B Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 755,387.			0.		
4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006					
1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 755,387.				0.	
be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 755,387.	1 Undistributed income for 2009 Subtract				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	lines 4d and 5 from line 1. This amount must				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 755,387.	be distributed in 2010				0.
section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	7 Amounts treated as distributions out of				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	corpus to satisfy requirements imposed by				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	section 170(b)(1)(F) or 4942(g)(3)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 755, 387. 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	· · · · · · · · · · · · · · · · · · ·				
Subtract lines 7 and 8 from line 6a 755, 387. 10 Analysis of line 9 a Excess from 2005 b Excess from 2006	not applied on line 5 or line 7	0.			
10 Analysis of line 9 a Excess from 2005 b Excess from 2006	9 Excess distributions carryover to 2010.				
a Excess from 2005 b Excess from 2006	Subtract lines 7 and 8 from line 6a	755,387.			
b Excess from 2006	10 Analysis of line 9				
	a Excess from 2005				
s Excess from 2007 193,625.					
	c Excess from 2007 193,625.				
d Excess from 2008 385,750.					
e Excess from 2009 176, 012.	e Excess from 2009 176,012.				5 000 PE (2000)

	Foundation			20-58	14715 Page 10
Part XIV Private Operating F	oundations (see in:	structions and Part VI	I-A, question 9)	N/A	
1 a K the foundation has received a ruling of	r determination letter that	it is a private operating			
foundation, and the ruling is effective fo	r 2009, enter the date of t	he ruling	▶ <u> </u>		
b Check box to indicate whether the found	dation is a private operatir	g foundation described	ın section	4942(j)(3) or49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	···	
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for					
each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities					
e Qualifying distributions made directly					
for active conduct of exempt activities					
Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the					
alternative test relied upon a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter	·		 		
2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross					
investment income (interest,			}		
dividends, rents, payments on					
securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public					
and 5 or more exempt					
organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from			†· · · · · ·		
an exempt organization					
(4) Gross investment income			· · · · · · · · · · · · · · · · · · ·		
Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or me	ore in assets
at any time during t					
1 Information Regarding Foundation	on Managers:				-
a List any managers of the foundation wh	_	than 2% of the total con	tributions received by the	e foundation before the clo	se of any tax
year (but only if they have contributed r			•		·
None					
b List any managers of the foundation wh	o own 10% or more of th	e stock of a corporation	(or an equally large port	ion of the ownership of a p	artnership or
other entity) of which the foundation ha					
None					
2 Information Regarding Contribut	ion, Grant, Gift, Loan,	Scholarship, etc., P	rograms:		
Check here X if the foundation of				not accept unsolicited requ	uests for funds. If
the foundation makes gifts, grants, etc	(see instructions) to indiv	riduals or organizations	under other conditions, c	omplete items 2a, b, c, and	b t
a The name, address, and telephone num	ber of the person to who	n applications should be	addressed		
<u> </u>		,			
b The form in which applications should t	oe submitted and informa	tion and materials they s	hould include		
c Any submission deadlines			·		
			·		
d Any restrictions or limitations on award	s, such as by geographic	al areas, charitable fields	, kinds of institutions, or	other factors	
			· · · · · · · · · · · · · · · · · · ·		F 000 DE (0000)

Page 11

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation status of recipient Purpose of grant or contribution **Amount** Name and address (home or business) a Paid during the year See Statement 6 **▶** 3a 165,000. Total b Approved for future payment None **▶** 3b Total

er gross amounts unless otherwise indicated	Unrelated I	ousiness income		y section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exemp
Program service revenue	code		code		
		·			
Fees and contracts from government agencie		· ·			
lembership dues and assessments	·				
iterest on savings and temporary cash					
vestments					
ividends and interest from securities			14	1,621.	
et rental income or (loss) from real estate					
Debt-financed property					
Not debt-financed property					
et rental income or (loss) from personal					
roperty					
ther investment income					
ain or (loss) from sales of assets other					
nan inventory					
let income or (loss) from special events					
ross profit or (loss) from sales of inventory					
Other revenue					
·					
		_			
ubtotal Add columns (b), (d), and (e)		(0.	1,621.	
otal. Add line 12, columns (b), (d), and (e)				13	1,6
worksheet in line 13 instructions to verify calcu	lations)				
rt XVI-B Relationship of Act	vities to the Accon	nplishment of	Exempt P	urposes	
Explain below how each activity for the foundation's exempt purposes (I importantly to the accom	plishment of
N/A	<u>-</u>	<u> </u>			
		· · · · · · · · · · · · · · · · · · ·			
			<u>.</u>		
					-

P	art XVII Information Regarding Transfers To a Exempt Organizations	and Transactions a	and Relationships With Nor	ncharitable		
1	Did the organization directly or indirectly engage in any of the following	g with any other organization	on described in section 501(c) of		Yes	No
	the Code (other than section 501(c)(3) organizations) or in section 52					
а	Transfers from the reporting foundation to a noncharitable exempt org	ganization of				
	(1) Cash			1a(1)		_ X
	(2) Other assets			1a(2)		X
b	Other transactions					
	(1) Sales of assets to a noncharitable exempt organization			1b(1)		<u>X</u>
(2) Purchases of assets from a noncharitable exempt organization						X
(3) Rental of facilities, equipment, or other assets						X
	(4) Reimbursement arrangements			1b(4)		X
	(5) Loans or loan guarantees			1b(5)		X
	(6) Performance of services or membership or fundraising solicitation			1b(6)		X
	Sharing of facilities, equipment, mailing lists, other assets, or paid emi			10		
đ	If the answer to any of the above is "Yes," complete the following sche				ers.	
	or services given by the reporting foundation. If the foundation receive	eo iess than fair market valu	ie in any transaction or snamig arranger	nent, snow in		
(2)	column (d) the value of the goods, other assets, or services received Line no (b) Amount involved (c) Name of noncharitable	exempt organization	(d) Description of transfers, transaction	ns and shanno arr	engerne	nts
(4)	N/A	exempt organization	(a) Description of dansers, transaction	ns, and sharing and	angerne	
	11/21	-, ···				
						
		· · · - ·				
				-		
				<u> </u>		
						
		·				
2a	Is the foundation directly or indirectly affiliated with, or related to, one		zations described	г	ГФ	٦
	in section 501(c) of the Code (other than section 501(c)(3)) or in section 501(c)(3)	ion 52/7		L Yes	Λ] No
D	o If "Yes," complete the following schedule (a) Name of organization	(b) Type of organization	(c) Description of re	lationship		
	N/A	(b) Type of organization	(2) 2000 (p. 10)		-	
			-			
П	Under penalties of penjury, I declare that I have examined this return, including according			ief, it is true, correc	et,	
1	and complete Declaration of preparer (other than taxpager or fiduciary) is based on a	all information of which preparer	has any knowledge			
	1000	1/30/10	TRZACIVEZIR			
Sign Here	Signature of officer or trustee	Date	Title			
핕	Preparer's Preparer's		Date Check if self-	Preparer's Identify	ing nun	nber
Sig	signature Wer Down Firm's name (or yours Gray Plant Mooty if self-employed). 500 IDS Center, 80		F/26/10 employed	1111/24-		
ļ	Firm's name for yours Gray Plant Mooty	garath Ott Ci	EIN ▶4/-/	7/17/2	5	
	iself-employed. 500 IDS Center, 80		1	(12) (2)	າ າ	000
	address and ZH code Minneapolis, MN 554	02-3/96	Phone no (612) 63: Form 990		000
				romm 990 .	(2009)

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

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

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

OMB No 1545-0047

Employer identification number

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

2009

Не	gardt Foundation	20-5814715						
Organization type (check or	Organization type (check one):							
Filers of:	Section:							
Form 990 or 990-EZ	501(c)() (enter number) organization							
	4947(a)(1) nonexempt charitable trust not treated as a private foundation							
	527 political organization							
Form 990-PF	X 501(c)(3) exempt private foundation							
	4947(a)(1) nonexempt charitable trust treated as a private foundation							
	501(c)(3) taxable private foundation							
General Rule	7), (8), or (10) organization can check boxes for both the General Rule and a Special Rul							
contributor. Compl		or property, treat any ene						
Special Rules								
509(a)(1) and 170(b	e)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the region (1)(A)(vi), and received from any one contributor, during the year, a contribution of the goal of the goa							
aggregate contribu	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III.							
contributions for us If this box is check purpose. Do not co	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.							
but it must answer "No" on	nat is not covered by the General Rule and/or the Special Rules does not file Schedule B Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 ing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).							

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions

for Form 990, 990-EZ, or 990-PF.

Schedule B	(Form 990,	990-EZ.	or 990-PF)	(2009)

Page 1 of 1 of Part !

Name of organization

Employer identification number

Hegardt Foundation

20-5814715

Part I	Contributors	(see instructions)
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(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
Winifred J. and John M. Harris Charitable Lead Annuity Trust Winifred & John Harris, Grantors 824 Market Street, Suite 210 Wilmington, DE 19810	\$\$	Person X Payroll Noncash (Complete Part II if there is a noncash contribution.)
(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	 \$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
	Name, address, and ZIP+4 Winifred J. and John M. Harris Charitable Lead Annuity Trust Winifred & John Harris, Grantors 824 Market Street, Suite 210 Wilmington, DE 19810 (b) Name, address, and ZIP+4 (b) Name, address, and ZIP+4 (b) Name, address, and ZIP+4	Name, address, and ZIP + 4 Aggregate contributions

Form 990-PF Dividen	ds and	Inter	est f	rom	Secur	ities	Statement 1
Source		Capital Ga Gross Amount Dividence					
Citi Smith Barney	•		1,6	21.		0.	1,621.
Total to Fm 990-PF, Part I,	ln 4		1,6	21.		0.	1,621.
Form 990-PF		Legal	Fees				Statement 2
Description	Expe	a) nses Books	Net ment			(c) Adjusted Net Incom	
Gray Plant Mooty		1,866.			0.		1,866.
To Fm 990-PF, Pg 1, ln 16a		1,866.	•		0.		1,866.
Form 990-PF		Тах	es				Statement 3
Description	Expe	a) nses Books	Net ment			(c) Adjusted Net Incom	
2008 Excise Tax - Form 990-PF		113.			0.		113.
To Form 990-PF, Pg 1, ln 18		113.			0.		113.
Form 990-PF	0	ther E	xpens	es			Statement 4
Description	Expe	a) nses Books	Net ment			(c) Adjusted Net Incom	
Reimbursements to Trustees for misc expenses incurred in creating foundation Postage	3	0,327.			0.		30,327. 230.
Web Hosting Costs and Conference Calling State of Minnesota Filing		797.			0.		797.
Fee		25.			0.		25.

 Hegardt Foundation
 20-5814715

 Correction of 2008 Annual Bank Charges
 < 150.>
 0.
 < 150.>

 To Form 990-PF, Pg 1, ln 23
 31,229.
 0.
 31,229.

 Form 990-PF
 List of Substantial Contributors
 Statement
 5

Name of Contributor

Address

Part VII-A, Line 10

Winifred J. and John M. Harris Charitable Lead Annuity Trust U/A dtd 5/5/05

824 Market Street, Suite 210

Wilmington, DE 19810

Winifred and John Harris, Grantors

	and Contributions During the Year	Statement 6		
Recipient Name and Address	Recipient Relationship and Purpose of Grant	Recipient Status	Amount	
Doctors Without Borders 333 - 7th Avenue, 2nd Floor New York, NY 10003	General Operating	Public	75,000.	
Friends of the Nature Conservancy of Canada, Inc. 36 Eglinton Avenue West, Suite 400 Toronto, ON M4R 1A1	General Operating	Public	10,000.	
Guthrie Theater 818 South 2nd Street Minneapolis, MN 55415	General Operating	Public	10,000.	
La Donna Musicale BU Station, PO Box 309 Boston, MA 02215	General Operating	Public	10,000.	
Lake Superior Chamber Orchestra P.O. Box 434 Duluth, MN 558010434	General Operating	Public	10,000.	
Marshall School 1215 Rice Lake Road Duluth, MN 55812	General Operating	Public	25,000.	
Public Radio International 100 North 6th St, Suite 900A Minneapolis, MN 55403	General Operating	Public	5,000.	
Southern Minnesota Regional Legal Services 55 E. 5th St., Suite 400 St. Paul, MN 55101	General Operating	Public	5,000.	

. Hegardt Foundation		20-5814715
St. Paul Chamber Orchestra 408 St. Peter St., 3rd Floor General Operating St. Paul, MN 55102	Public	5,000.
Visions in Rhythm, dba Tapestry Dance Company General Operating 2302 Western Trails Blvd. Austin, TX 78745	Public	10,000.
Total to Form 990-PF, Part XV, line 3a	-	165,000.