Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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: MONROE-SCHULER FOUNDATION

Number and street (or P O box number if mail is not delivered to street address): 145 OX YOKE LANE | Room/suite:

City or town, state, and ZIP code: RENO, NV 89521

A Employer identification number: 20-5968471

B Telephone number (see page 10 of the instructions): (775) 852-3427

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 3,374,870.

J Accounting method: [X] Cash ☐ Accrual
☐ 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 ▶ ☐ if the foundation is **not** required to attach Sch B.				
	3 Interest on savings and temporary cash investments	1,956.			ATCH 1
	4 Dividends and interest from securities	66,268.	66,268.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-296,427.			
	b Gross sales price for all assets on line 6a 458,900.				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	79.	79.		ATCH 3
	12 **Total.** Add lines 1 through 11	-228,124.	66,347.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	36,000.	18,000.		18,000.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) ATCH 4	7,928.	3,964.	0.	3,964.
	c Other professional fees (attach schedule) *	12,994.	12,264.		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	1,293.	4,869.		1,987.
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 7	24,975.	12,487.		12,488.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	83,190.	51,584.	0.	36,439.
	25 Contributions, gifts, grants paid	145,308.			145,308.
	26 **Total expenses and disbursements** Add lines 24 and 25	228,498.	51,584.	0.	181,747.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	-456,622.			
	b **Net investment income** (if negative, enter -0-)		14,763.		
	c **Adjusted net income** (if negative, enter -0-)			-0-	

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	25,032.	25,032.	25,032.
	2 Savings and temporary cash investments	120,585.	19,776.	19,776.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) ATCH 8	4,806,125.	4,450,313.	3,330,063.
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	4,951,742.	4,495,121.	3,374,871.
Liabilities	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 ▶)			
	23 **Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ X			
	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	4,951,742.	4,495,120.	
	30 **Total net assets or fund balances** (see page 17 of the instructions)	4,951,742.	4,495,120.	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	4,951,742.	4,495,120.	

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	4,951,742.
2	Enter amount from Part I, line 27a	2	-456,622.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,495,120.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,495,120.

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr.)
1a	SEE PART IV SCHEDULE			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(i) F M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7	2	-296,427.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	174,507.	3,842,363.	0.045417
2007	15,542.	4,775,712.	0.003254
2006	7,100.	3,342,056.	0.002124
2005			
2004			

2	Total of line 1, column (d)	2	0.050795
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.016932
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,977,434.
5	Multiply line 4 by line 3	5	50,414.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	148.
7	Add lines 5 and 6	7	50,562.
8	Enter qualifying distributions from Part XII, line 4	8	181,747.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ____________ (attach copy of ruling letter if necessary - see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b		1	148.
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	
3	Add lines 1 and 2		3	148.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	148.
6	Credits/Payments			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a 220.		
b	Exempt foreign organizations-tax withheld at source	6b 0.		
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	220.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	72.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 72. **Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
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?	1a		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)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		X
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ NV,			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	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*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

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

		Line	Yes	No
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 ▶ N/A

14 The books are in care of ▶ MICHAEL SCHULER Telephone no ▶ 775-229-4181

Located at ▶ 145 OX YOKE LANE RENO, NV ZIP + 4 ▶ 89521

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 |

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.

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		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?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see page 20 of the instructions)		2b		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)*		3b		
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

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

			Yes	No
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)?		**5b**		
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes	☒ No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes	☒ No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		X
If "Yes" to 6b, file Form 8870				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes	☒ No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		**7b**		

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATTACHMENT 9		36,000.	22,533.	-0-

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 ▶ NONE

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 N/A	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes		
a	Average monthly fair market value of securities	1a	2,837,397.
b	Average of monthly cash balances	1b	185,379.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0.
d	**Total** (add lines 1a, b, and c)	1d	3,022,776.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	3,022,776.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	45,342.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,977,434.
6	**Minimum investment return.** Enter 5% of line 5	6	148,872.

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

1	Minimum investment return from Part X, line 6			1	148,872.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	148.		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	148.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	148,724.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	148,724.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	148,724.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes		
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	181,747.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	181,747.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	148.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	181,599.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				148,724.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			144,453.	
b Total for prior years 20 07 ,20 06 ,20 05				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 181,747.				
a Applied to 2008, but not more than line 2a			144,453.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				37,294.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (*If an amount appears in column (d), the same amount must be shown in column (a).*)				
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008. Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				111,430.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009 0.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

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

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

Part XV Supplementary Information (Complete this part only if the 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))

ATTACHMENT 10

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

N/A

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

Check here ▶ [X] 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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
***a** Paid during the year*				
ATTACHMENT 11				
Total . . . . ▶ **3a**				145,308.
***b** Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
1 Program service revenue.					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1,956.	
4 Dividends and interest from securities			14	66,268.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	79.	
8 Gain or (loss) from sales of assets other than inventory			18	-296,427.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				-228,124.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 -228,124.

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions.)
	N/A

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		N/A

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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

Signature of officer or trustee — Date: 6/23/10 — Title: TREASURER

Paid Preparer's Use Only

Preparer's signature	Date 6/23/10	Check if self-employed ☐
Preparer's identifying number (See Signature on page 30 of the instructions)	P00184039	
Firm's name (or yours if self-employed), address, and ZIP code	GRANT THORNTON LLP 100 WEST LIBERTY STREET, SUITE 770 RENO, NV 89501	EIN ▶ 36-6055558 Phone no 775-786-1520

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		WHITTIER TRUST COMPANY ST (SEE ATTACHMEN					VARIOUS	VARIOUS
56,500.		54,647.					1,853.	
		WHITTIER TRUST COMPANY LT (SEE ATTACHMEN					VAR	VAR
388,055.		679,233.					-291,178.	
		BERSTEIN (SEE ATTACHED)					VARIOUS	VARIOUS
14,345.		21,447.					-7,102.	
TOTAL GAIN(LOSS)							-296,427.	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
WHITTIER TRUST		1,956.
	TOTAL	1,956.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
WHITTIER TRUST COMPANY DIVIDENDS	33,096.	33,096.
BERNSTEIN DIVIDENDS	33,172.	33,172.
TOTAL	66,268.	66,268.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MISCELLANEOUS INCOME	79.	79.
TOTALS	79.	79.

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES	7,928.	3,964.		3,964.
TOTALS	7,928.	3,964.	0.	3,964.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESTMENT FEES	12,994.	12,264.
TOTALS	12,994.	12,264.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
PAYROLL TAXES	3,974.	1,987.	1,987.
FOREIGN TAXES	2,882.	2,882.	
FEDERAL TAX	-5,563.		
TOTALS	1,293.	4,869.	1,987.

ATTACHMENT 7

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
SUPPLIES	196.	98.	98.
BANKING FEES	53.	27.	26.
BUSINESS REGISTRATION FEES	25.	12.	13.
COMPUTER EXPENSE	762.	381.	381.
REFERENCE MATERIALS	95.	48.	47.
INSURANCE	23,283.	11,641.	11,642.
WORKMANS COMP	561.	280.	281.
TOTALS	24,975.	12,487.	12,488.

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 8

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
WHITTIER TRUST SEE ATTACHMENT	1,810,433.	1,774,445.
BERNSTEIN SEE ATTACHMENT	1,726,160.	1,007,031.
BERNSTEIN HEDGE FUND	913,720.	548,587.
TOTALS	4,450,313.	3,330,063.

For the Account of:
MONROE-SCHULER FOUNDATION
WHITTIER TRUST COMPANY OF NEVADA, INC. AS AGENT

Account Number: *52 00 7354 0 0D*
Date: *DECEMBER 31, 2009*

THE WHITTIER TRUST COMPANY
OF NEVADA

Review of Assets

Shares or Par Value		Unit Market	Investment Cost Basis	Total Market Value	Est. Annual Income	Current Yield
	CASH		1,204.58	1,204.58		
	CASH EQUIVALENTS					
	MISC CASH EQUIV-TAXABLE					
12,854.74	BLACKROCK PROVIDENT TEMPFUND-INCOME		12,854.74	12,854.74	14	0.11
5,716 24	BLACKROCK PROVIDENT TEMPFUND		5,716.24	5,716 24	6	0.11
	TOTAL MISC CASH EQUIV-TAXABLE		18,570.98	18,570.98	20	0.11
	TOTAL CASH EQUIVALENTS		18,570.98	18,570.98 2	20	0.11
	EQUITIES					
	US LARGE CAP EQUITIES					
500	AT&T INC	28.030	13,660.00	14,015.00	840	5 99
400	ABBOTT LABS	53.990	22,347.36	21,596.00	640	2.96
275	ADOBE SYS INC	36.780	11,528.90	10,114.50	0	0.00
200	AIR PRODS & CHEMS INC	81.060	12,616.27	16,212.00	360	2.22
400	ALTRIA GROUP INC	19.630	8,232.85	7,852.00	544	6.93
455	APPLE COMPUTER INC	210.732	42,464.61	95,883.06	0	0.00
1,000	BANK OF AMERICA CORPORATION	15.060	55,332.85	15,060.00	40	0.27
200	BECTON DICKINSON & CO	78.860	15,304.00	15,772.00	296	1.88
200	BOEING CO	54.130	17,910.61	10,826.00	336	3.10
700	BROADCOM CORP CL A	31.470	21,674.16	22,029.00	0	0.00
50	CME GROUP INC	335.960	26,608.26	16,798.00	230	1.37
500	CELGENE CORP	55.680	35,028.26	27,840.00	0	0.00
475	CHEVRON CORP	76.990	35,380.79	36,570.25	1,292	3.53
1,300	CISCO SYS INC	23.940	33,071.48	31,122.00	0	0.00
400	COCA COLA CO	57.000	19,942.00	22,800.00	656	2.88

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For the Account of:
MONROE-SCHULER FOUNDATION
WHITTIER TRUST COMPANY OF NEVADA, INC. AS AGENT

Account Number: *52 00 7354 0 0D*
Date: *DECEMBER 31, 2009*

THE WHITTIER TRUST COMPANY
OF NEVADA

Review of Assets

Shares or Par Value		Unit Market	Investment Cost Basis	Total Market Value	Est. Annual Income	Current Yield
275	DISNEY WALT CO COM DISNEY	32.250	9,290.38	8,868.75	96	1.09
325	DOW CHEM CO	27.630	14,897.85	8,979.75	195	2.17
500	EMERSON ELEC CO	42.600	25,993.43	21,300 00	670	3.15
600	EXXON MOBIL CORP	68.190	45,538.25	40,914.00	1,008	2.46
230	FLUOR CORP NEW	45.040	10,333.59	10,359.20	115	1.11
200	FRANKLIN RES INC	105.350	24,014.02	21,070.00	176	0.84
500	GENERAL ELECTRIC CO	15.130	17,732.39	7,565.00	200	2 64
1,000	GILEAD SCIENCES INC	43.270	27,193.25	43,270.00	0	0.00
110	GOLDMAN SACHS GROUP INC	168.840	22,728.54	18,572.40	154	0.83
120	GOOGLE INC CL A	619.980	55,442.07	74,397.60	0	0.00
300	HEINZ H J CO	42.760	12,857.70	12,828.00	504	3.93
500	HEWLETT PACKARD CO	51.510	19,943.24	25,755.00	160	0.62
400	HONEYWELL INTL INC	39.200	22,706.34	15,680.00	484	3.09
1,000	INTEL CORP	20.400	21,180.00	20,400.00	560	2.75
200	INTERNATIONAL BUSINESS MACHS	130.900	18,915.45	26,180.00	440	1.68
150	ISHARES DJ FINL SECTOR	51.780	14,130.00	7,767.00	147	1.89
800	JP MORGAN CHASE & CO	41.670	38,523.03	33,336.00	160	0.48
1,000	KRAFT FOODS INC	27.180	33,290.24	27,180.00	1,160	4.27
500	MARATHON OIL CORP	31.220	27,517.47	15,610.00	480	3.07
300	MARKET VECTORS ETF TR GOLD MINER ETF	46.210	16,350.00	13,863.00	33	0.24
460	MCDONALDS CORP	62.440	20,641.52	28,722.40	1,012	3.52
300	MCKESSON CORP	62.500	10,635.00	18,750 00	144	0.77
800	MEDCO HEALTH	63.910	34,137.72	51,128.00	0	0.00
1,100	MICROSOFT CORP	30.480	30,400.35	33,528.00	572	1.71
350	MONSANTO CO (NEW)	81.750	19,170.58	28,612.50	371	1.30

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For the Account of:
MONROE-SCHULER FOUNDATION
WHITTIER TRUST COMPANY OF NEVADA, INC. AS AGENT

Account Number: *52 00 7354 0 0D*
Date: *DECEMBER 31, 2009*

THE WHITTIER TRUST COMPANY
OF NEVADA

Review of Assets

Shares or Par Value		Unit Market	Investment Cost Basis	Total Market Value	Est. Annual Income	Current Yield
120	NIKE INC CL B	66.070	6,361.74	7,928.40	130	1.63
200	NORTHROP GRUMMAN CORP	55.850	15,359.23	11,170.00	344	3 08
400	PEPSICO INC	60.800	27,365.62	24,320.00	720	2.96
400	PHILIP MORRIS INTL INC	48.190	18,760.08	19,276.00	928	4.81
500	PROCTER & GAMBLE CO	60.630	32,372.38	30,315.00	880	2.90
600	QUALCOMM INC	46.260	25,383.31	27,756.00	408	1.47
1,000	STARBUCKS CORP	23.060	26,180 00	23,060.00	0	0.00
550	SYSCO CORP	27.940	15,378.00	15,367.00	550	3.58
375	TJX COS INC	36 550	10,061.25	13,706.25	180	1.31
250	TARGET CORP	48.370	14,899.39	12,092.50	170	1.41
350	TRAVELERS COMPANIES, INC	49.860	18,459.25	17,451.00	462	2.65
375	VERIZON COMMUNICATIONS	33.130	14,006.42	12,423.75	713	5.73
200	WAL MART STORES INC	53.450	10,198.00	10,690.00	218	2.04
300	WELLPOINT INC	58.290	23,999.75	17,487.00	0	0.00
375	YUM BRANDS INC	34 970	11,347.50	13,113.75	315	2.40
	TOTAL US LARGE CAP EQUITIES		1,234,796.73	1,235,283.06	20,093	1.63
	US SMALL AND MID-CAP EQUITIES					
460	AMERISOURCEBERGEN CORP	26.070	11,149.35	11,992.20	147	1 23
500	CLOROX CO DEL	61.000	31,870.33	30,500.00	1,000	3.28
300	HERSHEY CO	35.790	10,895.25	10,737.00	357	3.32
1,000	INTERDIGITAL INC	26.560	20,909.89	26,560.00	0	0.00
500	NETWORK APPLIANCE INC	34.360	14,437.04	17,180.00	0	0.00
1,000	NORTHWEST PIPE CO	26.860	36,979.00	26,860.00	0	0.00
1,000	POWERSHARES GLOBAL WATER RESOURCES	16.860	21,570 00	16,860.00	290	1.72
1,000	POWERSHARES GLOBAL ETF WATER	18.160	25,900.00	18,160.00	715	3.94

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For the Account of:
MONROE-SCHULER FOUNDATION
WHITTIER TRUST COMPANY OF NEVADA, INC. AS AGENT

Account Number: *52 00 7354 0 0D*
Date: *DECEMBER 31, 2009*

THE WHITTIER TRUST COMPANY
OF NEVADA

Review of Assets

Shares or Par Value		Unit Market	Investment Cost Basis	Total Market Value	Est. Annual Income	Current Yield
1,500	WINDSTREAM CORP	10.990	16,903.40	16,485.00	1,500	9.10
200	WISCONSIN ENERGY CORP	49.830	9,460.12	9,966.00	270	2.71
	TOTAL US SMALL AND MID-CAP EQUITIES		200,074.38	185,300.20	4,279	2.31
	ALTERNATIVE ASSETS					
800	ISHARES SILVER TRUST ISHARES	16.539	15,152.00	13,231.20	0	0.00
125	ISHARES COMEX GOLD TR ISHARES	107.370	14,857.50	13,421.25	0	0.00
500	ISHARES TR INDEX S&P NA NAT RES	34.310	17,252.50	17,155.00	188	1.09
500	ISHARES TR DJ OIL&GAS EXP	53 990	31,182.00	26,995.00	133	0.49
750	JPMORGAN CHASE & CO ALERIAN ML ETN	28.580	20,059.80	21,435.00	1,329	6 20
	TOTAL ALTERNATIVE ASSETS		98,503.80	92,237.45	1,650	1.79
	FOREIGN EQUITIES					
150	ALCON INC COM SHS	164.350	19,818.64	24,652.50	547	2.22
120	AMERICA MOVIL SAB DE CV SPON ADR L SHS	46.980	5,728.62	5,637.60	54	0.97
275	BP AMOCO P L C SPONSORED ADR	57.970	18,040.51	15,941.75	924	5.60
150	BHP BILLITON LTD SPONSORED ADR	76.580	11,650.32	11,487.00	246	2.14
600	CEMIG SA-SPONS ADR SP ADR N-V PFD	18.060	11,460.00	10,836.00	479	4.42
300	CREDIT SUISSE GROUP SPONSORED ADR	49.160	21,597.14	14,748.00	18	0.12
300	DIAGEO P L C SPON ADR NEW	69.410	25,738.35	20,823.00	680	3.26
375	MARKET VECTORS ETF TR AGRIBUS ETF	43.790	16,770.00	16,421.25	158	0.96
400	NOKIA CORP SPONSORED ADR	12.850	9,146.71	5,140.00	157	3 06
250	NOVARTIS A G SPONSORED ADR	54.430	13,912.50	13,607.50	364	2 67

#CNTL# ?OSPCNTL#? ?PF? ?PT?/01072010/13.51.50/264/309

For the Account of:
MONROE-SCHULER FOUNDATION
WHITTIER TRUST COMPANY OF NEVADA, INC. AS AGENT

Account Number: *52 00 7354 0 0D*
Date: *DECEMBER 31, 2009*

THE WHITTIER TRUST COMPANY
OF NEVADA

Review of Assets

Shares or Par Value		Unit Market	Investment Cost Basis	Total Market Value	Est. Annual Income	Current Yield
400	PETROLEO BRASILEIRO SA PETRO SPONSORED ADR	47.680	21,056.96	19,072.00	142	0.75
200	POTASH CORP SASK INC	108.500	20,089.45	21,700.00	80	0.37
250	SCHLUMBERGER LTD	65.090	18,353.71	16,272.50	210	1.29
250	TEVA PHARMACEUTICAL INDS LTD ADR	56 180	11,204.38	14,045.00	121	0.86
400	VALE S A ADR	29.030	11,757.12	11,612.00	90	0.78
500	VIVENDI SA SPONSORED ADR	29.835	13,382.15	14,917.50	716	4.80
450	VODAFONE GROUP PLC NEW SPONS ADR NEW	23.090	13,274.49	10,390.50	581	5.59
	TOTAL FOREIGN EQUITIES		262,981.05	247,304.10	5,567	2.25
	MUTUAL FUND-US LARGE CAP					
1,000	EATON VANCE ENH EQTY INC FD	14.320	14,076.60	14,320.00	1,728	12.07
	TOTAL EQUITIES		1,810,432.56	1,774,444.81	33,317	1.88
	GRAND TOTAL		1,830,208.12	1,794,220.37	33,337	1.86

#CNTL# ?OSPCNTL#? ?PF? ?PT?/01072010/13:51.50/264/310

Reporting Currency: US dollars

Quantity		Ticker/Cusip	Trade Date	Unit Cost	Market Price	Total Cost	Market Value	Estimated Annual Income	Yield	% of Portfolio	% of Asset Class
EQUITIES											
DOMESTIC											
MUTUAL FUNDS											
		ARIIX									
23,377	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		03/29/07	$17.83	$7.90	$416,811.63	$184,678.17	$5,330	2.89%	18.3%	18.3%
79	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		07/05/07	$17.30	$7.90	$1,362.07	$621.98	$18	2.89%	0.1%	0.1%
2,087	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		07/09/07	$17.25	$7.90	$36,000.00	$16,486.96	$476	2.89%	1.6%	1.6%
602	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		07/10/07	$16.94	$7.90	$10,200.00	$4,756.79	$137	2.89%	0.5%	0.5%
9,098	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		12/27/07	$11.57	$7.90	$105,265.98	$71,875.65	$2,074	2.89%	7.1%	7.1%
1,549	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		12/31/07	$11 63	$7.90	$18,009.15	$12,233.21	$353	2.89%	1.2%	1.2%
14	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		01/03/08	$11.40	$7.90	$156.18	$108.23	$3	2.89%	0.0%	0.0%
0	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		06/03/08	$11.15	$7.90	$4.36	$3.09	$0	2.89%	0.0%	0.0%
293	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		06/26/08	$9.91	$7.90	$2,907.64	$2,317.90	$67	2.89%	0.2%	0.2%
0	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		07/02/08	$9.66	$7.90	$1.12	$0.92	$0	2.89%	0.0%	0.0%
339	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		06/24/09	$6.13	$7.90	$2,077.55	$2,677.43	$77	2.89%	0.3%	0.3%
1,786	ALLIANCEBERNSTEIN GLOBAL REAL ESTATE INVT FD II CL I		12/28/09	$7.82	$7.90	$13,964.38	$14,107.24	$407	2.89%	1.4%	1.4%
39,224						$606,760.06	$309,867.56	$8,943	2.89%	30.8%	30.8%
TOTAL DOMESTIC EQUITIES						**$606,760.06**	**$309,867.56**	**$8,943**	**2.89%**	**30.8%**	**30.8%**
INTERNATIONAL											
INTERNATIONAL EQUITY MUTUAL FUNDS											
		SCBMFAX									

Quantity		Ticker/Cusip	Trade Date	Unit Cost	Market Price	Total Cost	Market Value	Estimated Annual Income	Yield	% of Portfolio	% of Asset Class
29,405	BERNSTEIN INTERNATIONAL PORTFOLIO		03/29/07	$26.74	$15.13	$786,295.73	$444,901.05	$12,115	2.72% ***	44.2%	44.2%
824	BERNSTEIN INTERNATIONAL PORTFOLIO		07/09/07	$29.39	$15.13	$24,213.51	$12,465.14	$339	2.72% ***	1.2%	1.2%
331	BERNSTEIN INTERNATIONAL PORTFOLIO		07/10/07	$29.02	$15.13	$9,610.32	$5,010.48	$136	2.72% ***	0.5%	0.5%
9	BERNSTEIN INTERNATIONAL PORTFOLIO		07/11/07	$29.26	$15.13	$276.00	$142.72	$4	2.72% ***	0.0%	0.0%
0	BERNSTEIN INTERNATIONAL PORTFOLIO		07/20/07	$29.23	$15.13	$3.80	$1.97	$0	2.72% ***	0.0%	0.0%
10	BERNSTEIN INTERNATIONAL PORTFOLIO		07/26/07	$27.84	$15.13	$280.00	$152.16	$4	2.72% ***	0.0%	0.0%
29	BERNSTEIN INTERNATIONAL PORTFOLIO		08/09/07	$27.27	$15.13	$800.30	$444.02	$12	2.72% ***	0.0%	0.0%
0	BERNSTEIN INTERNATIONAL PORTFOLIO		09/07/07	$27.38	$15.13	$1.15	$0.64	$0	2.72% ***	0.0%	0.0%
8	BERNSTEIN INTERNATIONAL PORTFOLIO		09/12/07	$27.45	$15.13	$214.13	$118.03	$3	2.72% ***	0.0%	0.0%
0	BERNSTEIN INTERNATIONAL PORTFOLIO		09/18/07	$27.98	$15.13	$10.38	$5.61	$0	2.72% ***	0.0%	0.0%
47	BERNSTEIN INTERNATIONAL PORTFOLIO		09/25/07	$28.70	$15.13	$1,335.11	$703.85	$19	2.72% ***	0.1%	0.1%
4,697	BERNSTEIN INTERNATIONAL PORTFOLIO		12/11/07	$25.26	$15.13	$118,656.63	$71,071.84	$1,935	2.72% ***	7.1%	7.1%
1	BERNSTEIN INTERNATIONAL PORTFOLIO		02/04/08	$22.92	$15.13	$11.76	$7.76	$0	2.72% ***	0.0%	0.0%
53	BERNSTEIN INTERNATIONAL PORTFOLIO		03/25/08	$22.23	$15.13	$1,169.56	$796.02	$22	2.72% ***	0.1%	0.1%
159	BERNSTEIN INTERNATIONAL PORTFOLIO		09/24/08	$17.78	$15.13	$2,819.53	$2,399.30	$65	2.72% ***	0.2%	0.2%
491	BERNSTEIN INTERNATIONAL PORTFOLIO		12/15/08	$11.77	$15.13	$5,779.03	$7,428.78	$202	2.72% ***	0.7%	0.7%
147	BERNSTEIN INTERNATIONAL PORTFOLIO		12/30/08	$12.14	$15.13	$1,780.76	$2,219.34	$60	2.72% ***	0.2%	0.2%
178	BERNSTEIN INTERNATIONAL PORTFOLIO		03/30/09	$9.99	$15.13	$1,780.76	$2,696.98	$73	2.72% ***	0.3%	0.3%

Portfolio Valuation Reporting Currency: US dollars

Quantity		Ticker/Cusip	Trade Date	Unit Cost	Market Price	Total Cost	Market Value	Estimated Annual Income	Yield	% of Portfolio	% of Asset Class
97	BERNSTEIN INTERNATIONAL PORTFOLIO		09/23/09	$15.12	$15.13	$1,460.08	$1,461.04	$40	2.72% ***	0.1%	0.1%
961	BERNSTEIN INTERNATIONAL PORTFOLIO		10/06/09	$14.92	$15.13	$14,345.00	$14,546.90	$396	2.72% ***	1.4%	1.4%
695	BERNSTEIN INTERNATIONAL PORTFOLIO		12/14/09	$15.14	$15.13	$10,522.62	$10,515.67	$286	2.72% ***	1.0%	1.0%
38,142						$981,366.16	$577,089.32	$15,715	2.72%	57.3%	57.3%
	EMERGING MARKETS										
EMERGING MARKETS MUTUAL FUNDS											
		SCBMFZ									
1,911	BERNSTEIN EMERGING MARKETS PORTFOLIO		03/29/07	$39.92	$29.07	$76,268.20	$55,540.10	$969	1.74% ***	5.5%	5.5%
1,075	BERNSTEIN EMERGING MARKETS PORTFOLIO		12/11/07	$40.96	$29.07	$44,021.46	$31,242.78	$545	1.74% ***	3.1%	3.1%
451	BERNSTEIN EMERGING MARKETS PORTFOLIO		12/09/08	$14.72	$29.07	$6,640.03	$13,113.16	$229	1.74% ***	1.3%	1.3%
666	BERNSTEIN EMERGING MARKETS PORTFOLIO		12/15/03	$15.47	$29.07	$10,300.00	$19,349.02	$337	1.74% ***	1.9%	1.9%
29	BERNSTEIN EMERGING MARKETS PORTFOLIO		12/08/09	$28.18	$29.07	$803.99	$829.40	$14	1.74% ***	0.1%	0.1%
4,131						$138,033.68	$120,074.45	$2,094	1.74%	11.9%	11.9%
TOTAL EQUITIES						**$1,726,159.90**	**$1,007,031.33**	**$26,752**	**2.66%**	**100.0%**	**100%**
NET PORTFOLIO VALUE						**$1,726,159.90**	**$1,007,031.33**	**$26,752**	**2.66%**	**100.0%**	

Total portfolio cost includes the reinvestment of interest, dividends and capital gains distributions as well as sale proceeds and therefore is not equivalent to the capital you have invested in this account.

The above quantity rounds your fund shares to the nearest whole share. For the fractional shares held, see your monthly brokerage statement.

*** International and Emerging Market Fund yields are estimated based on the current dividends of the foreign stocks in the fund, net of estimated fund expenses. The actual fund dividend can vary significantly due to gains and losses on foreign currency transactions. The S.E.C. yield calculation is not available.

Quantity		Ticker/Cusip	Trade Date	Unit Cost	Market Price	Total Cost	Market Value	Estimated Annual Income	Yield	% of Portfolio	% of Asset Class
HEDGE FUNDS											
		AU03311									
2,000	AB GLOBAL DIVERSIFIED STRATEGY LTD. HEDGE FUND A (USD) CLASS 1-SERIES JULY 2007		07/01/07	$100.00	$58.41	$200,000.00	$116,810.99	$0	0.00%	21.3%	21.3%
137	AB GLOBAL DIVERSIFIED STRATEGY LTD. HEDGE FUND A (USD) CLASS 1-SERIES JULY 2007		07/02/07	$100.00	$58.41	$13,720.00	$8,013.23	$0	0.00%	1.5%	1.5%
...						$213,720.00	$124,824.22	$0	0.00%	22.8%	22.8%
		AU03292									
7,000	AB GLOBAL DIVERSIFIED STRATEGY LTD. HEDGE FUND A (USD) CLASS 1-SERIES MAY 2007		05/01/07	$100.00	$60.54	$700,000.00	$423,762.54	$0	0.00%	77.2%	77.2%
TOTAL HEDGE FUNDS						**$913,720.00**	**$548,586.75**	**$0**	**0.00%**	**100.0%**	**100%**
NET PORTFOLIO VALUE						**$913,720.00**	**$548,586.75**	**$0**	**0.00%**	**100.0%**	

Total portfolio cost includes the reinvestment of interest, dividends and capital gains distributions as well as sale proceeds and therefore is not equivalent to the capital you have invested in this account.

The cost basis of your investment in the Global Diversified Strategies Hedge Fund A Ltd. (US Dollar) may not be equivalent to the value of your initial investment and any subsequent investments if your investments included securities that were transferred directly into the Global Diversified Strategies Hedge Fund A Ltd. (US Dollar).

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 9

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS
JANIS R. MONROE 10293 WINDING ROCK TRAIL RENO, NV 89511	TRUSTEE 0.00		
CHARLES P. MONROE 10293 WINDING ROCK TRAIL RENO, NV 89511	TRUSTEE 0.00		
ELIZABETH MONROE SCHULER 145 OX YOKE LANE RENO, NV 89521	TRUSTEE 38.00	24,000.	11,267.
MICHAEL E. SCHULER 145 OX YOKE LANE RENO, NV 89521	TRUSTEE 38.00	12,000.	11,266.
	GRAND TOTALS	36,000.	22,533.

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

CHARLES P. MONROE
JANIS R. MONROE
ELIZABETH SCHULER
MICHAEL SCHULER

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ANIMAL ARK P.O BOX 60057 RENO, NV 89506-0057	NONE PUBLIC	BILLBOARD RESEARCH	5,000
ASSOCIATION OF SMALL FOUNDATIONS 1720 N STREET NW WASHINGTON, DC 20036	NONE PUBLIC	ANNUAL MEMBERSHIP 501(C) AND DONATION	995
NEVADA WOMEN'S FUND 770 SMITHRIDGE DRIVE, SUITE 300 RENO, NV 89502	NONE PUBLIC	SILVER ANNIVERSARY CAMPAIGN FOR GRANTS	20,000.
RENO RODEO FOUNDATION 500 RYLAND STREET, STE 200 RENO, NV 89502	NONE PUBLIC	SCHOLARSHIPS	5,000.
RENO SPARKS GOSPEL MISSION 2115 TIMBER WAY RENO, NV 89512	NONE PUBLIC	REFRIGERATED TRUCK AND 2 PASSENGER VANS	36,683
RENOWN HEALTH FOUNDATION 1155 MILL STREET (02) RENO, NV 89502	NONE PUBLIC	HEART CENTER FOR CANCER RESEARCH AND HEART RESEARCH	10,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ST MARY'S FOUNDATION 520 WEST SIXTH STREET RENO, NV 89503	NONE PUBLIC	FREE CLINICS	10,000.
SAMARITAN'S PURSE P O BOX 3000 BOONE, NC 28607	NONE PUBLIC	SHOEBOX CONTENTS FOR NEEDY CHILDREN.	4,550.
NEVADA MUSEUM OF ART 160 WEST LIBERTY ST RENO, NV 89501	NONE PUBLIC	GENERAL FUND AND VOLUNTEER ORGANIZATION	2,450.
UNR SCHOOL OF MEDICINE ANSARI BUSINESS BUILDINGS/MS-0024 RENO, NV 89557-0016	NONE PUBLIC	SCHOOL OF MEDICINE RENO	2,000.
UNR FOUNDATION ANSARI BUSINESS BUILDING/MS-0024 RENO, NV 89557-0016	NONE PUBLIC	BUSINESS GENERAL FUND	3,000.
TRUCKEE MEADOWS HABITAT FOR HUMANITY 992 SPICE ISLAND DRIVE SPARKS, NV 89431	NONE PUBLIC	MT CHARLES BUILDING PROJECT IN STEAD	2,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DSWACUMC 1550 E. MEADOWBROOK, STE 200 PHOENIX, AZ 85014	NONE PUBLIC	CAMP HOPE SPONSORSHIP	385.
FOOD BANK OF NORTHERN NEVADA 550 ITALY DRIVE MCCARRAN, NV 89434	NONE PUBLIC	BACKPACK MEALS AND FOOD.	6,080
BOYS AND GIRLS CLUB 2680 E 9TH STREET RENO, NV 89512	NONE PUBLIC	ONGOING PROGRAMS AND FOOD.	5,000.
NORTHERN NEVADA HUMANE SOCIETY 2825 LONGLEY LANE STE B RENO, NV 89502	NONE PUBLIC	FOOD AND/OR SHELTER	1,000
GIRL SCOUTS OF THE SIERRA 605 WASHINGTON ST RENO, NV 89503	NONE PUBLIC	SCHOLARSHIPS	165
OVERIAN CANCER NATIONAL ALLIANCE 910 17TH STREET STE 1190 WASHINGTON, DC 20006	NONE PUBLIC	OVARIAN CANCER RESEARCH	2,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ST. MARK'S PRESBYTERIAN CHURCH 3809 E THIRD STREET TUSCON, AZ 85716	NONE PUBLIC	DEACON'S FUND #198 AND GENERAL FUND	2,000.
SCORE 2500 CORLEONE DR SPARKS, NV 89434	NONE PUBLIC	RENO WEBSITE- SCHEDULING AND REGISTRATION	4,000
AMERICAN CANCER SOCIETY P.O BOX 22718 OKLAHOMA CITY, OK 73123	NONE PUBLIC	CANCER RESEARCH	1,500.
AMERICAN BRITTANY RESCUE 114 MARLIN COURT CENTREVILLE, MD 21617	NONE PUBLIC	GENERAL FUND	1,000
LEUKEMIA AND LUMPHOMA SOCIETY 5353 W. DARTMOUTH AVE. #400 DENVER, CO 80227	NONE PUBLIC	GENERAL FUND	500
THEODORE ROOSEVELT CONSERVATION PARTNERSHIP 555 11TH ST. NW 6TH FLOOR WASHINGTON, DC 20004	NONE PUBLIC	CONSERVATION	5,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CENTER OF HOPE 75 PRINGLE WAY RENO, NV 89502	NONE PUBLIC	CANCER RESEARCH	2,000.
ROCKY MOUNTAIN ELK FOUNDATION 5705 GRANT CREEK MISSOULA, MT 59808	NONE PUBLIC	CONSERVATION AND HERITAGE EFFORTS	2,500.
HEALTH NETWORK FOUNDATION 33 RIVER STREET CHAGRIN FALLS, OH 44022	NONE PUBLIC	HEART AND PULMONARY	6,000
CLINTON COUNTY FOUNDATION 290 PRAIRIE AVE WILMINGTON, OH 45177	NONE PUBLIC	ECONOMIC DEVELOPMENT.	4,500.
		TOTAL CONTRIBUTIONS PAID	145,308.

SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2009

Name of estate or trust: MONROE-SCHULER FOUNDATION

Employer identification number: 20-5968471

Note: *Form 5227 filers need to complete only Parts I and II*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a						

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	1,853.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	1,853.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

	(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a						

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-298,280.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-298,280.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Part III **Summary of Parts I and II**
Caution: *Read the instructions before completing this part.*

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			1,853.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			-298,280.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-296,427.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary*

Part IV **Capital Loss Limitation**

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of **a** The loss on line 15, column (3) **or** **b** $3,000	16	(3,000)

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *on page 7 of the instructions to figure your capital loss carryover*

Part V **Tax Computation Using Maximum Capital Gains Rates**

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if*

- *Either line 14b, col (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)			17			
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18					
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19					
20	Add lines 18 and 19	20					
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- ▶	21					
22	Subtract line 21 from line 20 If zero or less, enter -0-			22			
23	Subtract line 22 from line 17 If zero or less, enter -0-			23			
24	Enter the **smaller** of the amount on line 17 or $2,300			24			
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26, go to line 27 and check the "No" box ☐ **No.** Enter the amount from line 23			25			
26	Subtract line 25 from line 24			26			
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22			27			
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)			28			
29	Subtract line 28 from line 27			29			
30	Multiply line 29 by 15% (15)					30	
31	Figure the tax on the amount on line 23 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)					31	
32	Add lines 30 and 31					32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)					33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)					34	

SCHEDULE D-1 (Form 1041)

Department of the Treasury Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041).

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No 1545-0092

2009

Name of estate or trust: MONROE-SCHULER FOUNDATION

Employer identification number: 20-5968471

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a WHITTIER TRUST COMPANY ST (SEE ATTACHMENT)	VARIOUS	VARIOUS	56,500.	54,647.	1,853.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . 1,853.

Name of estate or trust as shown on Form 1041. Do not enter name and employer identification number if shown on the other side	Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a WHITTIER TRUST COMPANY LT (SEE ATTACHMENT)			388,055.	679,233.	-291,178.
BERSTEIN (SEE ATTACHED)	VARIOUS	VARIOUS	14,345.	21,447.	-7,102.

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . . -298,280.

FOR TAX YEAR ENDED 12/31/2009

SECTION A - CAPITAL GAINS & LOSSES

SHORT TERM SALES & MATURITIES

SHARES/PAR	SECURITY	REG	DATE ACQUIRED	DATE SOLD	CAPITAL INCOME CASH	PROCEEDS TO PRINCIPAL CASH	COST BASIS	SHORT TERM GAIN OR LOSS
50000.0000	HONOLULU HAWAII CITY & CNTY 5.25a DUE 7/1/17 (438670MZ1)	1	08/26/08	05/07/09		56500.00	-54647.43	1852.57
	TOTAL SHORT TERM SALES & MATURITIES					56500.00	54647.43	1852.57
	TOTAL SHORT TERM GAIN & LOSSES							1852.57

LONG TERM SALES & MATURITIES

SHARES/PAR	SECURITY	REG	DATE ACQUIRED	DATE SOLD	CAPITAL INCOME CASH	PROCEEDS TO PRINCIPAL CASH	COST BASIS	LONG TERM GAIN OR LOSS
220.0000	ACCENTURE PLC IRELAND SHS CLASS A (G1151C101)	1	03/29/07	12/02/09		9222.16	-8436.86	785.30
30.0000	ACCENTURE PLC IRELAND SHS CLASS A (G1151C101)	1	03/29/07	12/02/09		1257.57	-1150.48	107.09
200.0000	INGERSOLL-RAND PLC SHS (G47791101)	1	03/29/07	12/02/09		7144.69	-8655.61	-1510.92
25.0000	INGERSOLL-RAND PLC SHS (G47791101)	1	03/29/07	12/02/09		893.09	-1081.95	-188.86
21.0000	ALCON INC COM SHS (H01301102)	1	03/29/07	12/02/09		3325.48	-2774.61	550.87
4.0000	ALCON INC COM SHS (H01301102)	1	03/29/07	12/02/09		633.42	-528.50	104.92
505.0000	FLEXTRONICS INTL LTD ORD (Y2573F102)	1	03/29/07	04/15/09		1711.90	-5409.91	-3698.01
95.0000	FLEXTRONICS INTL LTD ORD (Y2573F102)	1	03/29/07	04/15/09		322.04	-1017.70	-695.66
85.0000	AKAMAI TECHNOLOGIES INC COM (00971T101)	1	06/14/07	12/02/09		2055.25	-3991.60	-1936.35
20.0000	AKAMAI TECHNOLOGIES INC COM (00971T101)	1	06/14/07	12/02/09		483.59	-939.20	-455.61
100.0000	AKAMAI TECHNOLOGIES INC COM (00971T101)	1	11/21/07	12/02/09		2417.93	-3617.00	-1199.07
200.0000	AMERON INTERNATIONAL CORPORATION (030710107)	1	09/28/07	12/02/09		11599.98	-21055.00	-9455.02
150.0000	AMERON INTERNATIONAL CORPORATION (030710107)	1	01/31/08	12/02/09		8699.99	-13480.50	-4780.51
275.0000	ARCELORMITTAL SA LUXEMBOURG NY REGISTRY SH (03938L104)	1	03/30/07	12/02/09		11109.71	-19707.88	-8598.17
205.0000	BAKER HUGHES INC COM (057224107)	1	09/28/07	04/15/09		6391.73	-18519.70	-12127.97
20.0000	BAKER HUGHES INC COM (057224107)	1	06/05/07	04/15/09		623.58	-1699.21	-1075.63
30.0000	BAKER HUGHES INC COM (057224107)	1	06/05/07	04/15/09		935.38	-2548.81	-1613.43
45.0000	BAKER HUGHES INC COM (057224107)	1	06/01/07	04/15/09		1403.06	-3746.35	-2343.29

PROCESS DATE 01/07/2010

FOR TAX YEAR ENDED 12/31/2009

SECTION A - CAPITAL GAINS & LOSSES

LONG TERM SALES & MATURITIES

SHARES/PAR	SECURITY	REG	DATE ACQUIRED	DATE SOLD	CAPITAL INCOME CASH	PROCEEDS TO PRINCIPAL CASH	COST BASIS	LONG TERM GAIN OR LOSS
0.2375	BANK OF AMERICA CORPORATION COM (060505104)	1	03/29/07	01/29/09		1.68	-22.43	-20.75
227.5300	BANK OF AMERICA CORPORATION COM (060505104)	1	03/29/07	12/02/09		3533.45	-21489.34	-17955.89
123.4700	BANK OF AMERICA CORPORATION COM (060505104)	1	03/29/07	12/02/09		1917.44	-11661.27	-9743.83
200.0000	BOEING CO COM (097023105)	1	03/29/07	12/02/09		10669.73	-17910.62	-7240.89
705.0000	CBS CORP NEW CL B (124857202)	1	03/29/07	04/15/09		3708.20	-21477.40	-17769.20
95.0000	CBS CORP NEW CL B (124857202)	1	03/29/07	04/15/09		499.69	-2894.11	-2394.42
955.0000	COMCAST CORP (20030N200)	1	03/29/07	04/15/09		12577.03	-24092.82	-11515.79
10.0000	COMCAST CORP (20030N200)	1	03/29/07	04/15/09		131.70	-252.28	-120.58
35.0000	COMCAST CORP (20030N200)	1	03/29/07	04/15/09		460.93	-882.98	-422.05
40.0000	CREDIT SUISSE GROUP SPONSORED ADR (225401108)	1	03/29/07	12/02/09		2073.24	-2879.62	-806.38
35.0000	CREDIT SUISSE GROUP SPONSORED ADR (225401108)	1	03/29/07	12/02/09		1814.09	-2519.67	-705.58
100.0000	CROWN CASTLE INTL CORP COM (228227104)	1	11/21/07	12/02/09		3715.91	-4088.00	-372.09
145.0000	CROWN CASTLE INTL CORP COM (228227104)	1	03/30/07	12/02/09		5388.06	-4638.20	749.86
13.0000	EATON CORP COM (278058102)	1	03/29/07	12/02/09		838.87	-1079.13	-240.26
97.0000	EATON CORP COM (278058102)	1	03/29/07	12/02/09		6259.25	-8051.97	-1792.72
200.0000	EBAY INC COM (278642103)	1	09/28/07	04/15/09		2867.92	-7823.98	-4956.06
150.0000	EBAY INC COM (278642103)	1	04/16/07	04/15/09		2150.95	-5265.26	-3114.31
105.0000	EBAY INC COM (278642103)	1	04/19/07	04/15/09		1505.66	-3609.11	-2103.45
45.0000	EBAY INC COM (278642103)	1	04/19/07	04/15/09		645.28	-1546.76	-901.48
50.0000	FRANKLIN RES INC COM (354613101)	1	03/29/07	12/02/09		5441.86	-6003.50	-561.64
65.0000	GENENTECH INC COM NEW (368710406)	1	06/18/07	03/26/09		6175.00	-4995.13	1179.87
175.0000	GENENTECH INC COM NEW (368710406)	1	03/29/07	03/26/09		16625.00	-14263.25	2361.75
125.0000	GENENTECH INC COM NEW (368710406)	1	09/28/07	03/26/09		11875.00	-9761.25	2113.75

- MONROE-SCHULER FOUNDATION
WHITTIER TRUST COMPANY OF NEVADA, INC. AS AGENT

ACCOUNT SITUS =
TAX ID# = 205968471
STATE TAX ID# =

PROCESS DATE 01/07/2010

FOR TAX YEAR ENDED 12/31/2009

SECTION A - CAPITAL GAINS & LOSSES

LONG TERM SALES & MATURITIES

SHARES/PAR	SECURITY	REG	DATE ACQUIRED	DATE SOLD	CAPITAL INCOME CASH	PROCEEDS TO PRINCIPAL CASH	COST BASIS	LONG TERM GAIN OR LOSS
35.0000	GENENTECH INC COM NEW (368710406)	1	06/18/07	03/26/09		3325.00	-2689.69	635.31
500.0000	GENERAL ELECTRIC CO COM (369604103)	1	03/29/07	12/02/09		7989.79	-17732.40	-9742.61
100.0000	HEWLETT PACKARD CO COM (428236103)	1	03/29/07	12/02/09		4891.87	-3988.65	903.22
100.0000	HONEYWELL INTL INC COM (438516106)	1	09/28/07	12/02/09		3934.90	-5941.00	-2006.10
75.0000	JP MORGAN CHASE & CO COM (46625H100)	1	03/29/07	12/02/09		3118.42	-3611.53	-493.11
115.0000	MERCK & CO INC COM (589331107)	1	09/28/07	04/15/09		3009.47	-5945.50	-2936.03
90.0000	MERCK & CO INC COM (589331107)	1	04/30/07	04/15/09		2355.24	-4633.64	-2278.40
30.0000	MERCK & CO INC COM (589331107)	1	04/30/07	04/15/09		785.08	-1544.54	-759.46
65.0000	MERCK & CO INC COM (589331107)	1	04/17/07	04/15/09		1701.01	-3251.17	-1550.16
175.0000	MERCK & CO INC COM (589331107)	1	03/29/07	04/15/09		4579.63	-7671.81	-3092.18
25.0000	MERCK & CO INC COM (589331107)	1	03/29/07	04/15/09		654.23	-1095.97	-441.74
260.0000	METLIFE INC. (59156R108)	1	03/29/07	12/02/09		9071.17	-16384.16	-7312.99
40.0000	METLIFE INC. (59156R108)	1	03/29/07	12/02/09		1395.56	-2520.64	-1125.08
17.0000	NYSE EURONEXT COM (629491101)	1	03/29/07	12/02/09		424.82	-1614.52	-1189.70
118.0000	NYSE EURONEXT COM (629491101)	1	03/29/07	12/02/09		2948.74	-11206.66	-8257.92
115.0000	NYSE EURONEXT COM (629491101)	1	09/28/07	12/02/09		2873.78	-9066.60	-6192.82
300.0000	NETWORK APPLIANCE INC COM (64110D104)	1	03/29/07	12/02/09		9437.76	-10911.27	-1473.51
100.0000	NORTHROP GRUMMAN CORP COM (666807102)	1	11/21/07	12/02/09		5521.86	-7896.50	-2374.64
165.0000	NVIDIA CORP COM (67066G104)	1	11/21/07	09/29/09		2410.39	-4964.85	-2554.46
35.0000	NVIDIA CORP COM (67066G104)	1	11/21/07	12/02/09		476.69	-1053.15	-576.46
255.0000	NVIDIA CORP COM (67066G104)	1	03/29/07	12/02/09		3473.01	-4844.77	-1371.76
45.0000	NVIDIA CORP COM (67066G104)	1	03/29/07	12/02/09		612.88	-854.95	-242.07
100.0000	PFIZER INC COM (717081103)	1	05/16/07	04/15/09		1381.96	-2727.25	-1345.29

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FOR TAX YEAR ENDED 12/31/2009

SECTION A - CAPITAL GAINS & LOSSES

LONG TERM SALES & MATURITIES

SHARES/PAR	SECURITY	REG	DATE ACQUIRED	DATE SOLD	CAPITAL INCOME CASH	PROCEEDS TO PRINCIPAL CASH	COST BASIS	LONG TERM GAIN OR LOSS
75.0000	PFIZER INC COM (717081103)	1	05/14/07	04/15/09		1036.47	-2040.47	-1004.00
125.0000	PFIZER INC COM (717081103)	1	05/14/07	04/15/09		1727.46	-3400.78	-1673.32
1300.0000	PFIZER INC COM (717081103)	1	03/29/07	04/15/09		17965.53	-32983.34	-15017.81
400.0000	PFIZER INC COM (717081103)	1	09/28/07	04/15/09		5527.86	-9792.00	-4264.14
110.0000	SARA LEE CORP COM (803111103)	1	03/29/07	12/02/09		1350.77	-1841.74	-490.97
690.0000	SARA LEE CORP COM (803111103)	1	03/29/07	12/02/09		8472.98	-11552.73	-3079.75
100.0000	SPIRIT AEROSYSTEMS HLDGS INC COM CL A (848574109)	1	05/21/07	04/15/09		1156.97	-3350.00	-2193.03
50.0000	SPIRIT AEROSYSTEMS HLDGS INC COM CL A (848574109)	1	05/21/07	04/15/09		578.49	-1675.00	-1096.51
250.0000	SPIRIT AEROSYSTEMS HLDGS INC COM CL A (848574109)	1	03/30/07	04/15/09		2892.42	-8029.10	-5136.68
970.0000	SPRINT NEXTEL CORP COM FON (852061100)	1	03/29/07	04/15/09		3918.69	-18224.65	-14305.96
130.0000	SPRINT NEXTEL CORP COM FON (852061100)	1	03/29/07	04/15/09		525.19	-2442.47	-1917.28
220.0000	STARWOOD HOTELS&RESORTS WRLD COM (85590A401)	1	03/29/07	12/02/09		7027.50	-14280.57	-7253.07
30.0000	STARWOOD HOTELS&RESORTS WRLD COM (85590A401)	1	03/29/07	12/02/09		958.29	-1947.35	-989.06
393.7500	SUN MICROSYSTEMS INC COM NEW (866810203)	1	03/29/07	04/15/09		2382.12	-9482.91	-7100.79
31.2500	SUN MICROSYSTEMS INC COM NEW (866810203)	1	03/29/07	04/15/09		189.06	-752.61	-563.55
360.0000	TIME WARNER INC COM NEW (887317303)	1	03/29/07	04/15/09		7980.99	-16092.55	-8111.56
40.0000	TIME WARNER INC COM NEW (887317303)	1	03/29/07	04/15/09		886.78	-1788.06	-901.28
10.0404	TIME WARNER CABLE INC COM (88732J207)	1	03/29/07	04/15/09		282.03	-589.14	-307.11
89.9596	TIME WARNER CABLE INC COM (88732J207)	1	03/29/07	04/15/09		2526.89	-5278.54	-2751.65
0.4040	TIME WARNER CABLE INC COM (88732J207)	1	03/29/07	04/23/09		11.75	-23.71	-11.96
200.0000	WELLPOINT INC COM (94973V107)	1	03/29/07	12/02/09		10935.72	-15999.84	-5064.12
727.0000	WISDOMTREE TRUST INTL UTILITIES (97717W653)	1	12/13/07	12/02/09		16627.08	-26304.68	-9677.60
773.0000	WISDOMTREE TRUST INTL UTILITIES (97717W653)	1	12/14/07	12/02/09		17679.13	-27662.11	-9982.98

TAX LEDGER
- MONROE-SCHULER FOUNDATION
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ACCOUNT SITUS =
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STATE TAX ID# =

FOR TAX YEAR ENDED 12/31/2009

SECTION A - CAPITAL GAINS & LOSSES

LONG TERM SALES & MATURITIES

SHARES/PAR	SECURITY	REG	DATE ACQUIRED	DATE SOLD	CAPITAL INCOME CASH	PROCEEDS TO PRINCIPAL CASH	COST BASIS	LONG TERM GAIN OR LOSS
44.0000	WYETH COM (983024100)	1	04/19/07	04/15/09		1878.31	-2447.05	-568.74
16.0000	WYETH COM (983024100)	1	04/19/07	04/15/09		683.02	-889.83	-206.81
200.0000	WYETH COM (983024100)	1	11/21/07	04/15/09		8537.78	-9308.00	-770.22
240.0000	WYETH COM (983024100)	1	09/28/07	04/15/09		10245.34	-10725.60	-480.26
50.0000	WYNN RESORTS LTD (983134107)	1	09/28/07	12/02/09		3295.42	-7859.50	-4564.08
50.0000	WYNN RESORTS LTD (983134107)	1	03/29/07	12/02/09		3295.41	-4748.41	-1453.00
	TOTAL LONG TERM SALES & MATURITIES					388055.20	679232.91	-291177.71
	TOTAL LONG TERM GAIN & LOSSES							-291177.71
	TOTAL CAPITAL GAINS & LOSSES							-289325.14

Capital Gains Report

MONROE-SCHULER FOUNDATION (Account: 038-51147) January 1, 2009 through December 31, 2009

Open Date	Close Date	Quantity	Description	Sale Price	Unit Cost	Total Proceeds	Total Cost	Gain or Loss
LONG-TERM								
03/29/2007	10/06/2009	537.000	BERNSTEIN EMERGING MARKETS PORTFOLIO	26.97	39.92	14,345.00	21,436.61	-7,091.61
03/29/2007	10/06/2009	.260	BERNSTEIN EMERGING MARKETS PORTFOLIO	26.97	39.88	0.00	10.37	-10.37
SUBTOTAL FOR LONG-TERM						14,345.00	21,446.98	-7,101.98
TOTAL						14,345.00	21,446.98	-7,101.98

** ACCOUNT TOTALS **

CURRENT PERIOD - G/L -7,101.98

LONG TERM -7,101.98

Capital-Gains Distributions: If you own shares of the Sanford C. Bernstein Fund, Inc., you may have received an annual capital-gains distribution (different from the capital gains or losses on securities sold, which are listed in this report). Long-term capital-gains distributions are a separate item on the I.R.S. forms, and appear on the Summary-of-Key-Items report.

Zero-Cost Transactions: If you transferred securities to Bernstein for which the purchase price was unavailable, the total capital-gains figure that appears on this report needs to be adjusted. Any such transactions are segregated on the Capital-Gains report, with the cost entered as zero. You will need to update the report data with the correct purchase information.

This information should be reviewed by your tax advisor or accountant.

Form **8868** (Rev. April 2009) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . . ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing *(e-file)*. Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated From 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits.*

Type or print	Name of Exempt Organization	Employer Identification number
File by the due date for filing your return. See instructions.	MONROE-SCHULER FOUNDATION	20-5968471
	Number, street, and room or suite no. If a P.O. box, see instructions. 145 OX YOKE LANE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. RENO, NV 89521	

Check type of return to be filed (file a separate application for each return):

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

- The books are in the care of ▶ MICHAEL SCHULER

Telephone No. ▶ 775 229-4181 FAX No. ▶

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ [X] calendar year 2009 or
▶ [ ] tax year beginning ______, ______, and ending ______, ______.

2 If this tax year is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 0.
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	$ 0.
c	**Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see Instructions. Form **8868** (Rev. 4-2009)