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 01-01-2009 , and ending 12-31-2009

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation JW JOHNSON FAMILY CHARITABLE TRUST	**A Employer identification number** 20-7203295
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 10813 EAST WINDGATE PASS DRIVE	**B** Telephone number (see page 10 of the instructions) (507) 437-5145
	City or town, state, and ZIP code SCOTTSDALE, AZ 85255	**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 ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 2,905,082

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

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

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

	Line	Description	(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	30,008	30,008		
	4	Dividends and interest from securities	27,874	27,874		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-241,640			
	b	Gross sales price for all assets on line 6a 428,258				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	17,017	17,017		
	12	**Total.** Add lines 1 through 11	-166,741	74,899		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	6,030	3,015		3,015
	c	Other professional fees (attach schedule)	1,295	1,295		0
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	165	165		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	7,490	4,475		3,015
	25	Contributions, gifts, grants paid	128,600			128,600
	26	**Total expenses and disbursements.** Add lines 24 and 25	136,090	4,475		131,615
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-302,831			
	b	**Net investment income** (if negative, enter -0-)		70,424		
	c	**Adjusted net income** (if negative, enter -0-)				

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	8,090	2,727	2,727
2	Savings and temporary cash investments			
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶	108,050		
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 15 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			
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)			
c	Investments—corporate bonds (attach schedule)			
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	3,456,062	3,266,644	2,902,355
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)	3,572,202	3,269,371	2,905,082
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)	0	0	
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.			
27	Capital stock, trust principal, or current funds	0	0	
28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29	Retained earnings, accumulated income, endowment, or other funds	3,572,202	3,269,371	
30	**Total net assets or fund balances** (see page 17 of the instructions)	3,572,202	3,269,371	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	3,572,202	3,269,371	

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	3,572,202
2	Enter amount from Part I, line 27a	2	-302,831
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	3,269,371
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,269,371

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-241,640
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	191,576	3,256,902	0 058822
2007	178,908	3,849,769	0 046472
2006	0	3,689,943	0 0
2005			
2004			

2	**Total** of line 1, column (d).	2	0 105294
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 035098
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	2,504,240
5	Multiply line 4 by line 3.	5	87,894
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	704
7	Add lines 5 and 6.	7	88,598
8	Enter qualifying distributions from Part XII, line 4.	8	131,615

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 letter if necessary–see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	704
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	704
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	704
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	760		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	760
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	56
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 56	**Refunded** ▶		11	0

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		No
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		No
	*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		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ AZ			
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶AMG NATIONAL TRUST BANK Telephone no ▶(303) 694-2190

Located at ▶6501 E BELLEVIEW AVE SUITE 400 ENGLEWOOD CO ZIP+4 ▶80111

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		
	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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ **Yes** ☑ **No**			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **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		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

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

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**		No
	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
See Additional Data Table				

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

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

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NOT APPLICABLE	0
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 NOT APPLICABLE	0
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3. . . . . ▶	0

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

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	2,535,365
b	Average of monthly cash balances	1b	7,011
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	2,542,376
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,542,376
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	38,136
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,504,240
6	**Minimum investment return.** Enter 5% of line 5	6	125,212

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	125,212
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 704		
b	Income tax for 2009 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	704
3	Distributable amount before adjustments Subtract line 2c from line 1	3	124,508
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	124,508
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	124,508

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	131,615
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	131,615
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	704
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	130,911

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					124,508
2 Undistributed income, if any, as of the end of 2008					
a Enter amount for 2008 only.				0	
b Total for prior years 20___, 20___, 20___			0		
3 Excess distributions carryover, if any, to 2009					
a From 2004.					
b From 2005.					
c From 2006.					
d From 2007.	14,039				
e From 2008.	30,177				
f **Total** of lines 3a through e.		44,216			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 131,615					
a Applied to 2008, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .		0			
d Applied to 2009 distributable amount.					124,508
e Remaining amount distributed out of corpus		7,107			
5 Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		0			0
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		51,323			
b Prior years' undistributed income Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .			0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)		0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)		0			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		51,323			
10 Analysis of line 9					
a Excess from 2005. . . .					
b Excess from 2006. . . .					
c Excess from 2007. . . .	14,039				
d Excess from 2008. . . .	30,177				
e Excess from 2009. . . .	7,107				

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

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*				
See Additional Data Table				
Total . . . . ▶ **3a**				128,600
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	30,008	
4 Dividends and interest from securities			18	27,874	
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			01	17,017	
8 Gain or (loss) from sales of assets other than inventory			18	-241,640	
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)		0		-166,741	0

13 Total. Add line 12, columns (b), (d), and (e) . . . . . 13 -166,741

(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 organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

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

****** | 2010-05-07 | ******

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

	Date	Check if self-employed ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions)
Preparer's Signature: Patrice A Onofrio CPA			
Firm's name (or yours if self-employed), address, and ZIP code: A M G National Trust Bank, 6501 East Belleview Avenue Ste 400, Englewood, CO 801116020		EIN	Phone no (303) 694-2190

Additional Data

Software ID: 09000028
Software Version: 2009.03051
EIN: 20-7203295
Name: JW JOHNSON FAMILY CHARITABLE TRUST

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
337 SHARES OF PITNEY BOWES INCORPORATED	P	2008-07-08	2009-01-16
2 SHARES OF PITNEY BOWES INCORPORATED	P	2008-10-29	2009-01-16
199 SHARES OF NUCOR CORP	P	2008-11-20	2009-01-28
10 SHARES OF BANK OF AMERICA CORP AMERICA CORPORATION	P	2008-07-07	2009-01-29
504 SHARES OF US BANCORP DEL COM NEW	P	2008-03-04	2009-01-30
33 SHARES OF US BANCORP DEL COM NEW	P	2008-10-29	2009-01-30
219 SHARES OF WEYERHAEUSER CO COM	P	2008-07-08	2009-04-13
5 SHARES OF WELLS FARGO & COMPANY	P	2008-10-29	2009-04-30
11 SHARES OF PHILIP MORRIS INTERNATIONAL	P	2008-11-14	2009-08-14
31 SHARES OF BRISTOL MYERS SQUIBB CO COM	P	2008-10-29	2009-08-17
35 SHARES OF INTEL CORP	P	2008-10-29	2009-08-17
13 SHARES OF 3M CO	P	2008-10-29	2009-08-17
46 SHARES OF KRAFT FOODS INC	P	2008-10-29	2009-08-18
366 SHARES OF BANK OF AMERICA CORP AMERICA CORPORATION	P	2007-03-23	2009-01-29
37 SHARES OF BANK OF AMERICA CORP AMERICA CORPORATION	P	2007-08-01	2009-01-29
12 SHARES OF BANK OF AMERICA CORP AMERICA CORPORATION	P	2007-11-02	2009-01-29
506 SHARES OF WELLS FARGO & COMPANY	P	2008-02-08	2009-04-30
675 SHARES OF BRISTOL MYERS SQUIBB CO COM	P	2007-03-23	2009-08-17
3 SHARES OF BRISTOL MYERS SQUIBB CO COM	P	2007-08-01	2009-08-17
47 SHARES OF BRISTOL MYERS SQUIBB CO COM	P	2008-07-07	2009-08-17
39 SHARES OF HOME DEPOT	P	2008-02-19	2009-08-18
49 SHARES OF GENERAL ELEC CO COM	P	2007-03-23	2009-08-18
108 SHARES OF JPMORGAN CHASE & CO & CO	P	2007-03-23	2009-08-18
189 SHARES OF MICROSOFT CORPORATION	P	2007-03-23	2009-08-18
145 SHARES OF KRAFT FOODS INC	P	2008-07-11	2009-08-18
29 SHARES OF EXXON MOBIL CORP COM	P	2008-10-30	2009-11-06
177 SHARES OF HOME DEPOT	P	2008-02-19	2009-11-06
332 SHARES OF MICROSOFT CORPORATION	P	2007-03-23	2009-11-06
65 SHARES OF JPMORGAN CHASE & CO & CO	P	2007-03-23	2009-11-09
236 SHARES OF PFIZER COMMON STOCK	P	2007-03-23	2009-11-09

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
8,331		11,142	-2,811
49		47	2
8,819		5,405	3,414
69		223	-154
7,470		15,959	-8,489
489		996	-507
7,021		10,836	-3,815
101		165	-64
509		432	77
668		633	35
645		542	103
911		822	89
1,280		1,343	-63
2,531		18,955	-16,424
256		1,752	-1,496
83		542	-459
10,256		15,210	-4,954
14,542		18,657	-4,115
65		85	-20
1,013		964	49
1,040		1,081	-41
661		1,758	-1,097
4,472		5,268	-796
4,400		5,305	-905
4,036		4,187	-151
2,101		2,122	-21
4,620		4,905	-285
9,470		9,319	151
2,854		3,171	-317
4,041		6,068	-2,027

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-2,811
			2
			3,414
			-154
			-8,489
			-507
			-3,815
			-64
			77
			35
			103
			89
			-63
			-16,424
			-1,496
			-459
			-4,954
			-4,115
			-20
			49
			-41
			-1,097
			-796
			-905
			-151
			-21
			-285
			151
			-317
			-2,027

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
339 SHARES OF MICROSOFT CORPORATION	P	2007-03-23	2009-11-09
1003 861 SHARES OF AMER CENT INTL BOND FUND #992	P	2007-03-22	2009-03-09
421 4 SHARES OF T ROWE PRICE MID-CAP GROWTH #64	P	2007-03-22	2009-03-09
350 962 SHARES OF MERIDIAN GROWTH FUND #75	P	2007-03-22	2009-03-09
745 156 SHARES OF AMER CENT INTL BOND FUND #992	P	2007-03-22	2009-04-07
889 968 SHARES OF MERIDIAN GROWTH FUND #75	P	2007-03-22	2009-04-07
732 601 SHARES OF AMER CENT INTL BOND FUND #992	P	2007-03-22	2009-05-07
439 4 SHARES OF MERIDIAN GROWTH FUND #75	P	2007-03-22	2009-05-07
655 738 SHARES OF AMER CENT INTL BOND FUND #992	P	2007-03-22	2009-06-08
2374 498 SHARES OF WILLIAM BLAIR SMALL CAP GROWTH CL I	P	2007-03-22	2009-06-19
100000 UNITS OF KRAFT FOODS INC 4 125% 11/12/2009	P	2007-04-10	2009-11-12
6 SHARES OF TANGER FACTORY OUTLET CENTER	P	2008-05-05	2009-01-27
5 SHARES OF BRE PROPERTY CLASS A	P	2008-06-24	2009-01-27
20 SHARES OF CBL& ASSOCIATES PROPERTIES	P	2008-04-30	2009-01-27
5 SHARES OF CBL& ASSOCIATES PROPERTIES	P	2008-06-24	2009-01-27
46 SHARES OF STRATEGIC HOTELS & REPORTS I	P	2008-06-24	2009-01-27
117 SHARES OF EXTRA SPACE STORAGE INC	P	2008-05-30	2009-01-27
21 SHARES OF EXTRA SPACE STORAGE INC	P	2008-06-24	2009-01-27
11 SHARES OF AMB PROPERTY CORP	P	2008-06-24	2009-01-27
28 SHARES OF DUKE REALTY INVESTMENT INC NEW	P	2008-06-24	2009-01-27
6 SHARES OF REGENCY CENTERS CORP	P	2008-06-24	2009-01-27
59 SHARES OF HOSPITALITY PPTYS TR COM SH BEN INT	P	2008-05-02	2009-01-27
36 SHARES OF HOSPITALITY PPTYS TR COM SH BEN INT	P	2008-06-24	2009-01-27
17 SHARES OF SL GREEN REALTY CORP	P	2008-06-10	2009-01-27
3 SHARES OF SL GREEN REALTY CORP	P	2008-06-24	2009-01-27
12 SHARES OF UDR INC	P	2008-06-24	2009-01-27
7 289 SHARES OF APARTMENT INVT & MGMT CO-A	P	2008-06-24	2009-01-28
68 SHARES OF DOUGLAS EMMETT INC	P	2008-06-09	2009-01-28
7 SHARES OF DOUGLAS EMMETT INC	P	2008-06-24	2009-01-28
52 SHARES OF MACERICH COMPANY	P	2008-05-06	2009-01-28

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
9,707		9,516	191
12,960		13,990	-1,030
11,460		23,625	-12,165
7,251		14,711	-7,460
9,960		10,384	-424
21,951		37,303	-15,352
9,960		10,209	-249
11,956		18,417	-6,461
9,160		9,138	22
40,208		63,226	-23,018
100,000		97,356	2,644
187		239	-52
130		220	-90
87		498	-411
22		121	-99
71		463	-392
1,021		1,956	-935
183		320	-137
198		567	-369
298		623	-325
227		358	-131
828		1,904	-1,076
505		959	-454
263		1,565	-1,302
46		259	-213
140		272	-132
73		206	-133
702		1,608	-906
72		156	-84
875		3,839	-2,964

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			191
			-1,030
			-12,165
			-7,460
			-424
			-15,352
			-249
			-6,461
			22
			-23,018
			2,644
			-52
			-90
			-411
			-99
			-392
			-935
			-137
			-369
			-325
			-131
			-1,076
			-454
			-1,302
			-213
			-132
			-133
			-906
			-84
			-2,964

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
11 SHARES OF MACERICH COMPANY	P	2008-06-24	2009-01-28
85 SHARES OF U-STORE-IT TRUST	P	2008-06-24	2009-01-28
45 SHARES OF ACADIA REALTY TRUST	P	2008-05-05	2009-01-28
14 SHARES OF ACADIA REALTY TRUST	P	2008-06-24	2009-01-28
21 SHARES OF BROOKFIELD PROPERTIES CORP	P	2008-06-24	2009-01-28
45 SHARES OF POST PROPERTIES INC	P	2008-05-05	2009-01-28
18 SHARES OF POST PROPERTIES INC	P	2008-06-24	2009-01-28
28 SHARES OF WEINGARTEN REALTY INVESTORS	P	2008-06-24	2009-01-28
63 SHARES OF COUSINS PROPERTIES INC	P	2008-05-02	2009-01-28
20 SHARES OF COUSINS PROPERTIES INC	P	2008-06-24	2009-01-28
6 SHARES OF KILROY REALTY CORPORATION	P	2008-06-24	2009-01-28
52 SHARES OF CEDAR SHOPPING CENTERS INC	P	2008-05-07	2009-01-28
21 SHARES OF CEDAR SHOPPING CENTERS INC	P	2008-06-24	2009-01-28
10 951 SHARES OF SUNSTONE HOTEL INVESTORS INC	P	2008-06-24	2009-01-28
0 977 SHARES OF UDR INC	P	2009-02-02	2009-02-06
0 894 SHARES OF ACADIA REALTY TRUST	P	2009-01-30	2009-02-06
0 767 SHARES OF APARTMENT INVT & MGMT CO-A	P	2009-01-29	2009-02-06
4 SHARES OF ACADIA REALTY TRUST	P	2009-01-30	2009-02-24
8 SHARES OF APARTMENT INVT & MGMT CO-A	P	2009-01-29	2009-02-24
5 SHARES OF UDR INC	P	2009-02-02	2009-02-24
26 SHARES OF BOSTON PROPERTY CLASS A	P	2008-05-05	2009-03-06
13 SHARES OF BOSTON PROPERTY CLASS A	P	2008-06-24	2009-03-06
32 SHARES OF BOSTON PROPERTY CLASS A	P	2009-01-27	2009-03-06
7 SHARES OF CAMDEN PROPERTY TRUST	P	2008-06-24	2009-03-06
171 SHARES OF DIAMONDROCK HOSPITALITY CO	P	2008-04-30	2009-03-06
55 SHARES OF DIAMONDROCK HOSPITALITY CO	P	2008-06-24	2009-03-06
45 SHARES OF DIAMONDROCK HOSPITALITY CO	P	2009-01-30	2009-03-06
11 SHARES OF EASTGROUP PROPERTIES INC	P	2008-05-02	2009-03-06
8 SHARES OF EASTGROUP PROPERTIES INC	P	2008-06-24	2009-03-06
60 SHARES OF EASTGROUP PROPERTIES INC	P	2009-01-30	2009-03-06

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
185		706	-521
336		1,007	-671
536		1,140	-604
167		330	-163
122		389	-267
643		1,679	-1,036
257		580	-323
494		864	-370
680		1,627	-947
216		465	-249
154		289	-135
347		639	-292
140		248	-108
50		172	-122
11			11
10			10
5			5
38			38
42			42
42			42
790		2,660	-1,870
395		1,211	-816
973		1,398	-425
119		322	-203
501		2,163	-1,662
161		632	-471
132		186	-54
229		531	-302
167		347	-180
1,249		1,849	-600

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-521
			-671
			-604
			-163
			-267
			-1,036
			-323
			-370
			-947
			-249
			-135
			-292
			-108
			-122
			11
			10
			5
			38
			42
			42
			-1,870
			-816
			-425
			-203
			-1,662
			-471
			-54
			-302
			-180
			-600

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
31 SHARES OF EQUITY RESIDTL PPTY	P	2008-04-30	2009-03-06
18 SHARES OF EQUITY RESIDTL PPTY	P	2008-06-24	2009-03-06
79 SHARES OF EQUITY RESIDTL PPTY	P	2009-01-30	2009-03-06
5 SHARES OF ESSEX PROPERTY TRUST	P	2008-06-24	2009-03-06
6 SHARES OF ESSEX PROPERTY TRUST	P	2009-01-30	2009-03-06
46 SHARES OF FEDERAL REALTY INVS TRUST	P	2008-05-01	2009-03-06
11 SHARES OF FEDERAL REALTY INVS TRUST	P	2008-06-24	2009-03-06
8 SHARES OF FEDERAL REALTY INVS TRUST	P	2009-02-02	2009-03-06
13 SHARES OF HCP INC	P	2008-06-24	2009-03-06
74 SHARES OF HCP INC	P	2009-02-05	2009-03-06
73 SHARES OF HEALTHCARE REALTY TRUST INC	P	2008-05-02	2009-03-06
15 SHARES OF HEALTHCARE REALTY TRUST INC	P	2008-06-24	2009-03-06
93 SHARES OF HEALTHCARE REALTY TRUST INC	P	2009-01-27	2009-03-06
83 SHARES OF HEALTH CARE REIT INC	P	2009-01-30	2009-03-06
7 SHARES OF HIGHWOODS PPTYS INC COM	P	2008-06-24	2009-03-06
7 SHARES OF HIGHWOODS PPTYS INC COM	P	2009-01-30	2009-03-06
170 SHARES OF HOST HOTELS & RESORTS INC	P	2008-05-30	2009-03-06
90 SHARES OF HOST HOTELS & RESORTS INC	P	2008-06-24	2009-03-06
24 SHARES OF INLAND REAL ESTATE CORP	P	2008-06-24	2009-03-06
128 SHARES OF INLAND REAL ESTATE CORP	P	2009-01-30	2009-03-06
3 SHARES OF KIMCO REALTY CORPORATION	P	2008-04-30	2009-03-06
23 SHARES OF KIMCO REALTY CORPORATION	P	2008-06-24	2009-03-06
62 SHARES OF KIMCO REALTY CORPORATION	P	2009-01-30	2009-03-06
13 SHARES OF LASALLE HOTEL PROPERTIES	P	2008-06-24	2009-03-06
37 SHARES OF LASALLE HOTEL PROPERTIES	P	2009-01-30	2009-03-06
11 SHARES OF LIBERTY PROPERTY TRUST	P	2008-06-24	2009-03-06
16 SHARES OF MACK-CALI REALTY CORP	P	2008-06-24	2009-03-06
12 SHARES OF NATIONWIDE HEALTH PROPERTIES	P	2008-06-24	2009-03-06
61 SHARES OF NATIONWIDE HEALTH PROPERTIES	P	2009-02-11	2009-03-06
6 SHARES OF PS BUSINESS PARKS INC/CA	P	2008-06-24	2009-03-06

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
504		1,318	-814
293		702	-409
1,285		1,952	-667
268		545	-277
322		397	-75
1,782		3,826	-2,044
426		771	-345
310		399	-89
198		416	-218
1,127		1,688	-561
904		2,101	-1,197
186		371	-185
1,151		1,631	-480
2,175		3,109	-934
113		224	-111
113		163	-50
580		2,926	-2,346
307		1,260	-953
143		345	-202
762		1,289	-527
20		123	-103
153		801	-648
414		928	-514
47		339	-292
134		333	-199
179		363	-184
224		558	-334
223		378	-155
1,132		1,523	-391
171		328	-157

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-814
			-409
			-667
			-277
			-75
			-2,044
			-345
			-89
			-218
			-561
			-1,197
			-185
			-480
			-934
			-111
			-50
			-2,346
			-953
			-202
			-527
			-103
			-648
			-514
			-292
			-199
			-184
			-334
			-155
			-391
			-157

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
9 SHARES OF PS BUSINESS PARKS INC/CA	P	2009-01-30	2009-03-06
23 SHARES OF PUBLIC STORAGE INC	P	2008-05-05	2009-03-06
18 SHARES OF PUBLIC STORAGE INC	P	2008-06-24	2009-03-06
13 SHARES OF PUBLIC STORAGE INC	P	2009-01-30	2009-03-06
42 SHARES OF SIMON PROPERTY GROUP INC	P	2008-05-05	2009-03-06
19 SHARES OF SIMON PROPERTY GROUP INC	P	2008-06-24	2009-03-06
74 SHARES OF TANGER FACTORY OUTLET CENTER	P	2008-05-05	2009-03-06
14 SHARES OF TANGER FACTORY OUTLET CENTER	P	2008-06-24	2009-03-06
19 SHARES OF VENTAS INC	P	2008-05-02	2009-03-06
15 SHARES OF VENTAS INC	P	2008-06-24	2009-03-06
107 SHARES OF VENTAS INC	P	2009-01-30	2009-03-06
35 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2008-06-09	2009-03-06
9 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2008-06-24	2009-03-06
14 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2009-01-27	2009-03-06
40 SHARES OF WASHINGTON R EST IN TRUST SH BEN INT	P	2008-05-30	2009-03-06
16 SHARES OF WASHINGTON R EST IN TRUST SH BEN INT	P	2008-06-24	2009-03-06
8 SHARES OF WASHINGTON R EST IN TRUST SH BEN INT	P	2009-01-30	2009-03-06
15 473 SHARES OF AVALON BAY CMNTYS INC COM	P	2008-05-05	2009-03-06
9 283 SHARES OF AVALON BAY CMNTYS INC COM	P	2008-06-24	2009-03-06
6 SHARES OF AVALON BAY CMNTYS INC COM	P	2009-01-30	2009-03-06
8 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2009-03-12	2009-03-17
953 SHARES OF SIMON PROPERTY GROUP INC	P	2009-02-12	2009-03-23
011 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2009-03-12	2009-06-15
018 SHARES OF SIMON PROPERTY GROUP INC	P	2009-02-12	2009-06-23
2 SHARES OF SIMON PROPERTY GROUP INC	P	2009-02-12	2009-07-17
1 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2009-03-12	2009-07-17
3 SHARES OF CAMDEN PROPERTY TRUST	P	2007-03-26	2009-01-27
2 SHARES OF SIMON PROPERTY GROUP INC	P	2007-03-26	2009-01-27
33 SHARES OF BRE PROPERTY CLASS A	P	2007-07-24	2009-01-27
50 SHARES OF CBL& ASSOCIATES PROPERTIES	P	2007-03-26	2009-01-27

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
257		388	-131
1,081		2,120	-1,039
846		1,434	-588
611		815	-204
1,036		4,349	-3,313
469		1,755	-1,286
1,884		2,946	-1,062
356		496	-140
370		931	-561
292		641	-349
2,082		3,018	-936
974		3,270	-2,296
250		800	-550
390		718	-328
599		1,347	-748
240		492	-252
120		191	-71
619		1,558	-939
371		807	-436
240		320	-80
28			28
33			33
1			1
1			1
99			99
44			44
81		219	-138
87		224	-137
859		1,833	-974
218		2,319	-2,101

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-131
			-1,039
			-588
			-204
			-3,313
			-1,286
			-1,062
			-140
			-561
			-349
			-936
			-2,296
			-550
			-328
			-748
			-252
			-71
			-939
			-436
			-80
			28
			33
			1
			1
			99
			44
			-138
			-137
			-974
			-2,101

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
14 SHARES OF LIBERTY PROPERTY TRUST	P	2007-03-26	2009-01-27
102 SHARES OF STRATEGIC HOTELS & REPORTS I	P	2007-03-26	2009-01-27
25 SHARES OF AMB PROPERTY CORP	P	2007-03-26	2009-01-27
29 SHARES OF AMB PROPERTY CORP	P	2007-07-24	2009-01-27
98 SHARES OF DUKE REALTY INVESTMENT INC NEW	P	2007-03-26	2009-01-27
41 SHARES OF DUKE REALTY INVESTMENT INC NEW	P	2007-07-24	2009-01-27
19 SHARES OF REGENCY CENTERS CORP	P	2007-03-26	2009-01-27
3 SHARES OF REGENCY CENTERS CORP	P	2007-07-24	2009-01-27
60 SHARES OF HOSPITALITY PPTYS TR COM SH BEN INT	P	2007-03-26	2009-01-27
4 SHARES OF HOSPITALITY PPTYS TR COM SH BEN INT	P	2007-07-24	2009-01-27
99 SHARES OF HOST HOTELS & RESORTS INC	P	2007-03-26	2009-01-27
53 SHARES OF MACK-CALI REALTY CORP	P	2007-03-26	2009-01-27
62 SHARES OF UDR INC	P	2007-07-24	2009-01-27
419 SHARES OF SUNSTONE HOTEL INVESTORS INC	P	2007-07-24	2009-01-26
767 SHARES OF APARTMENT INVT & MGMT CO-A	P	2007-03-26	2009-01-28
50 944 SHARES OF APARTMENT INVT & MGMT CO-A	P	2007-07-24	2009-01-28
68 SHARES OF ACADIA REALTY TRUST	P	2007-03-26	2009-01-28
125 SHARES OF BROOKFIELD PROPERTIES CORP	P	2007-03-26	2009-01-28
10 SHARES OF BROOKFIELD PROPERTIES CORP	P	2007-07-24	2009-01-28
35 SHARES OF POST PROPERTIES INC	P	2007-03-26	2009-01-28
58 SHARES OF WEINGARTEN REALTY INVESTORS	P	2007-03-26	2009-01-28
30 SHARES OF WEINGARTEN REALTY INVESTORS	P	2007-07-24	2009-01-28
54 SHARES OF COUSINS PROPERTIES INC	P	2007-03-26	2009-01-28
6 SHARES OF COUSINS PROPERTIES INC	P	2007-07-24	2009-01-28
29 SHARES OF KILROY REALTY CORPORATION	P	2007-03-26	2009-01-28
153 SHARES OF CEDAR SHOPPING CENTERS INC	P	2007-03-26	2009-01-28
73 373 SHARES OF SUNSTONE HOTEL INVESTORS INC	P	2007-03-26	2009-01-28
676 SHARES OF SUNSTONE HOTEL INVESTORS INC	P	2007-07-24	2009-01-28
702 SHARES OF AVALON BAY CMNTYS INC COM	P	2007-03-26	2009-02-05
55 SHARES OF BOSTON PROPERTY CLASS A	P	2007-03-26	2009-03-06

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
280		695	-415
157		2,355	-2,198
449		1,459	-1,010
521		1,615	-1,094
1,045		4,296	-3,251
437		1,428	-991
719		1,588	-869
114		208	-94
842		2,764	-1,922
56		161	-105
573		2,625	-2,052
1,127		2,591	-1,464
721		1,595	-874
2		11	-9
8		35	-27
507		1,885	-1,378
811		1,845	-1,034
724		3,387	-2,663
58		235	-177
500		1,657	-1,157
1,023		2,790	-1,767
529		1,194	-665
583		1,836	-1,253
65		167	-102
742		2,207	-1,465
1,020		2,463	-1,443
337		1,845	-1,508
3		17	-14
35		90	-55
1,672		6,493	-4,821

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-415
			-2,198
			-1,010
			-1,094
			-3,251
			-991
			-869
			-94
			-1,922
			-105
			-2,052
			-1,464
			-874
			-9
			-27
			-1,378
			-1,034
			-2,663
			-177
			-1,157
			-1,767
			-665
			-1,253
			-102
			-1,465
			-1,443
			-1,508
			-14
			-55
			-4,821

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
11 SHARES OF CAMDEN PROPERTY TRUST	P	2007-03-26	2009-03-06
16 SHARES OF CAMDEN PROPERTY TRUST	P	2007-07-24	2009-03-06
139 SHARES OF DIAMONDROCK HOSPITALITY CO	P	2007-03-26	2009-03-06
36 SHARES OF EASTGROUP PROPERTIES INC	P	2007-03-26	2009-03-06
3 SHARES OF EASTGROUP PROPERTIES INC	P	2007-07-24	2009-03-06
76 SHARES OF EQUITY RESIDTL PPTY	P	2007-03-26	2009-03-06
30 SHARES OF ESSEX PROPERTY TRUST	P	2007-03-26	2009-03-06
55 SHARES OF HCP INC	P	2007-03-26	2009-03-06
9 SHARES OF HIGHWOODS PPTYS INC COM	P	2007-03-26	2009-03-06
36 SHARES OF HIGHWOODS PPTYS INC COM	P	2007-07-24	2009-03-06
5 SHARES OF HOST HOTELS & RESORTS INC	P	2007-03-26	2009-03-06
43 SHARES OF HOST HOTELS & RESORTS INC	P	2007-07-24	2009-03-06
81 SHARES OF INLAND REAL ESTATE CORP	P	2007-03-26	2009-03-06
34 SHARES OF INLAND REAL ESTATE CORP	P	2007-07-24	2009-03-06
37 SHARES OF KIMCO REALTY CORPORATION	P	2007-03-26	2009-03-06
52 SHARES OF KIMCO REALTY CORPORATION	P	2007-07-24	2009-03-06
45 SHARES OF LASALLE HOTEL PROPERTIES	P	2007-03-26	2009-03-06
54 SHARES OF LIBERTY PROPERTY TRUST	P	2007-03-26	2009-03-06
27 SHARES OF LIBERTY PROPERTY TRUST	P	2007-07-24	2009-03-06
21 SHARES OF MACK-CALI REALTY CORP	P	2007-03-26	2009-03-06
6 SHARES OF MACK-CALI REALTY CORP	P	2007-07-24	2009-03-06
57 SHARES OF NATIONWIDE HEALTH PROPERTIES	P	2007-03-26	2009-03-06
27 SHARES OF PS BUSINESS PARKS INC/CA	P	2007-03-26	2009-03-06
22 SHARES OF PS BUSINESS PARKS INC/CA	P	2007-07-24	2009-03-06
46 SHARES OF PUBLIC STORAGE INC	P	2007-08-10	2009-03-06
47 SHARES OF SIMON PROPERTY GROUP INC	P	2007-03-26	2009-03-06
17 SHARES OF SIMON PROPERTY GROUP INC	P	2007-07-24	2009-03-06
49 SHARES OF VENTAS INC	P	2007-03-26	2009-03-06
50 SHARES OF VORNADO REALTY TRUST REALTY TRUST	P	2007-03-26	2009-03-06
52 SHARES OF WASHINGTON R EST IN TRUST SH BEN INT	P	2007-03-26	2009-03-06

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
186		803	-617
271		998	-727
408		2,572	-2,164
749		1,865	-1,116
62		128	-66
1,237		3,661	-2,424
1,608		3,985	-2,377
837		1,993	-1,156
145		364	-219
581		1,326	-745
17		133	-116
147		1,000	-853
482		1,510	-1,028
202		541	-339
247		1,833	-1,586
347		1,993	-1,646
163		1,998	-1,835
879		2,681	-1,802
440		1,134	-694
294		1,026	-732
84		252	-168
1,058		1,781	-723
770		1,922	-1,152
627		1,255	-628
2,162		3,391	-1,229
1,160		5,260	-4,100
419		1,540	-1,121
954		2,100	-1,146
1,391		6,045	-4,654
779		1,960	-1,181

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-617
			-727
			-2,164
			-1,116
			-66
			-2,424
			-2,377
			-1,156
			-219
			-745
			-116
			-853
			-1,028
			-339
			-1,586
			-1,646
			-1,835
			-1,802
			-694
			-732
			-168
			-723
			-1,152
			-628
			-1,229
			-4,100
			-1,121
			-1,146
			-4,654
			-1,181

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
30 244 SHARES OF AVALON BAY CMNTYS INC COM	P	2007-03-26	2009-03-06
Capital Gains Dividends	P		

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

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
1,209		3,877	-2,668
4			4

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-2,668
			4

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
JOEL W JOHNSON 10813 E WINDGATE PASS DRIVE SCOTTSDALE, AZ 85255	TRUSTEE 1 00	0	0	0
ELIZABETH B JOHNSON 10813 E WINDGATE PASS DRIVE SCOTTSDALE, AZ 85255	TRUSTEE 1 00	0	0	0
KATHERINE E JOHNSON POTTER 13 GOULDING ST E SHERBORN, MA 01770	TRUSTEE 1 00	0	0	0
DR GEOFFREY B JOHNSON 5453 HAWTHORN HILL LANE NE ROCHESTER, MN 55906	TRUSTEE 1 00	0	0	0
PETER J JOHNSON 10813 E WINDGATE PASS DRIVE SCOTTSDALE, AZ 85255	TRUSTEE 1 00	0	0	0

Form 990PF Part XV Line 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*				
AUSTIN MEDICAL CENTER FOUNDATION1000 1ST DR NW AUSTIN,MN 55912	NONE	EXEMPT	SCIENCE	500
AUSTIN SALVATION ARMY409 1ST AVENUE NE AUSTIN,MN 55912	NONE	EXEMPT	COMMUNITY	100
CAMP BLAKE FOUNDATIONSPIRIT LAKE SPIRIT LAKE,IA 51360	NONE	EXEMPT	COMMUNITY	500
CAMP FOSTER YMCASPIRIT LAKE SPIRIT LAKE,IA 51360	NONE	EXEMPT	COMMUNITY	500
CHILDFUND INTERNATIONAL2821 EMERYWOOD PKWY RICHMOND,VA 23294	NONE	EXEMPT	COMMUNITY	100
DORSET LIBRARYPO BOX 38 ROUTE 30 DORSET,VT 05251	NONE	EXEMPT	COMMUNITY	100
FRIENDS OF JCH NATURE CENTER 9601 FOSSIL RIDGE RD FORT WORTH,TX 76135	NONE	EXEMPT	COMMUNITY	250
HARVARD BUSINESS SCHOOL124 MOUNT AUBURN ST CAMBRIDGE,MA 02138	NONE	EXEMPT	EDUCATIONAL	500
HORMEL FOUNDATION301 N MAIN AUSTIN,MN 55912	NONE	EXEMPT	COMMUNITY	20,000
HORMEL HISTORIC HOME301 N MAIN AUSTIN,MN 55912	NONE	EXEMPT	COMMUNITY	5,000
KARL POTACH FOUNDATION2217 SE 17TH ST AUSTIN,MN 55912	NONE	EXEMPT	SCIENCE	1,000
KBAQ2323 W 14TH ST TEMPE,AZ 85281	NONE	EXEMPT	COMMUNITY	100
LEUKEMIA AND LYMPHOMA3877 N 7TH ST PHOENIX,AZ 85014	NONE	EXEMPT	SCIENCE	100
MAYO CLINIC200 FIRST ST SW ROCHESTER,MN 55905	NONE	EXEMPT	SCIENCE	25,600
MDA3300 E SUNRISE DRIVE TUCSON,AZ 85718	NONE	EXEMPT	SCIENCE	100
Total . . . . ▶ **3a**				128,600

Form 990PF Part XV Line 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*				
NEPHCURE FOUNDATION15 WATERLOO AVE BERWYN,PA 19312	NONE	EXEMPT	SCIENCE	100
PACELLI HIGH SCHOOL311 4TH ST NW AUSTIN,MN 55912	NONE	EXEMPT	EDUCATIONAL	1,000
PHOENIX SYMPHONYONE NORTH FIRST ST SUITE 200 PHOENIX,AZ 85004	NONE	EXEMPT	COMMUNITY	500
ROCHESTER MONTESORRI SCHOOL 5099 7TH ST NW ROCHESTER,MN 55901	NONE	EXEMPT	COMMUNITY	10,000
RONALD MCDONALD HOUSEONE KROC DRIVE OAK BROOK,IL 60523	NONE	EXEMPT	COMMUNITY	100
SANTA CLARA UNIVERSITY500 EL CAMINO REAL SANTA CLARA,CA 95053	NONE	EXEMPT	EDUCATIONAL	1,000
SCOTTSDALE CONGREGATIONAL 4425 N GRANITE REEF RD SCOTTSDALE,AZ 85251	NONE	EXEMPT	RELIGIOUS	19,200
TRUSTEES OF HAMILTON COLLEGE 198 COLLEGE HILL RD CLINTON,NY 13323	NONE	EXEMPT	EDUCATIONAL	23,000
UNITED WAY OF MOWER CO301 NORTH MAIN ST AUSTIN,MN 55912	NONE	EXEMPT	COMMUNITY	5,000
USSGA MEMORIAL FUND88 FIELD POINT RD GREENWICH,CT 06830	NONE	EXEMPT	COMMUNITY	200
WEDIKO CHILDREN'S SERVICES11 BOBCAT BLVD WINDSOR,NH 03244	NONE	EXEMPT	COMMUNITY	100
WELLESLEY COLLEGE106 CENTRAL ST WELLESLEY,MA 02481	NONE	EXEMPT	EDUCATIONAL	10,100
WHISPERING HOPE RANCH5333 N 7TH ST SUITE C223 PHOENIX,AZ 85014	NONE	EXEMPT	COMMUNITY	50
WORLD LEARNINGKIPLING RD PO BOX 676 BRATTLEBORO,VT 05302	NONE	EXEMPT	EDUCATIONAL	300
YALE DIVINITY COLLEGE409 PROSPECT ST NEW HAVEN,CT 06511	NONE	EXEMPT	RELIGIOUS	1,000
Total . . . . ▶ **3a**				128,600

Form 990PF Part XV Line 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*				
YMCA STRONG KIDS CAMPAIGN 709 1ST AVE SW ROCHESTER, MN 55902	NONE	EXEMPT	COMMUNITY	2,500
Total . . . . ▶ **3a**				128,600

TY 2009 Accounting Fees Schedule

Name: JW JOHNSON FAMILY CHARITABLE TRUST

EIN: 20-7203295

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	35	17		18
TAX PREP FEE	5,995	2,998		2,997

TY 2009 Investments - Other Schedule

Name: JW JOHNSON FAMILY CHARITABLE TRUST

EIN: 20-7203295

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALLIANCEBERNSTEIN INTL GROWTH FUND	AT COST	90,040	61,602
AMER CENT INTL BOND FUND #992	AT COST	50,418	52,206
AMG NATIONAL TRUST BANK SWEEP	AT COST	193,017	193,017
ASTON/RIVER RD SMALL CAP VAL CL N	AT COST	48,383	35,411
BUFFALO SMALL CAP FUND #1444	AT COST	69,724	55,583
CALAMOS GROWTH FUND CLASS A #606	AT COST	310,590	247,972
CAUSEWAY INTERNATL VALUE FUND INST #1271	AT COST	100,040	56,129
DELAFIELD FUND INC	AT COST	41,740	35,990
DODGE & COX STOCK FUND #145	AT COST	288,140	175,905
GOLDMAN SACHS FS TIF US TREASURY INSTL #506	AT COST	98,854	98,854
HARBOR MID CAP VALUE FUND #023	AT COST	88,213	67,500
HARDING LOEVNER EMERG MKTS	AT COST	47,480	38,857
KRAFT FOODS INC 4.125% 11/12/2009	AT COST	0	0
MARSICO FOCUS FUND #40	AT COST	310,558	242,261
MERIDIAN GROWTH FUND #75	AT COST	62,558	53,003
OAKMARK INTERNATIONAL FUND (HARRIS) #109	AT COST	75,040	64,275
PIMCO HIGH YIELD INST #108	AT COST	234,980	265,892
PIMCO LOW DURATION FUND #36	AT COST	36,120	39,665
RS VALUE FUND - A	AT COST	131,347	95,214
SLM CORP 4.5% 07/26/2010	AT COST	73,490	74,732
T ROWE PRICE INTERNATIONAL BOND #76	AT COST	94,140	95,063
T ROWE PRICE MID-CAP GROWTH #64	AT COST	70,506	59,723
THIRD AVENUE INTERNATIONAL VALUE	AT COST	159,247	122,702
VANGUARD ENERGY FUND INVESTOR SHS #51	AT COST	21,580	178,325
WILLIAM BLAIR INTL GROWTH-I	AT COST	221,740	143,582
WILLIAM BLAIR SMALL CAP GROWTH CL I	AT COST	0	0
AMB PROPERTY CORP	AT COST	0	0
ACADIA REALTY TRUST	AT COST	0	0
APARTMENT INVT & MGMT CO-A	AT COST	0	0
AVALON BAY CMNTYS INC COM	AT COST	0	0
BRE PROPERTY CLASS A	AT COST	0	0
BOSTON PROPERTY CLASS A	AT COST	0	0
BROOKFIELD PROPERTIES CORP	AT COST	0	0
CBL& ASSOCIATES PROPERTIES	AT COST	0	0
CAMDEN PROPERTY TRUST	AT COST	0	0
CEDAR SHOPPING CENTERS INC	AT COST	0	0
COUSINS PROPERTIES INC	AT COST	0	0
DIAMONDROCK HOSPITALITY CO	AT COST	0	0
DOUGLAS EMMETT INC	AT COST	0	0
DUKE REALTY INVESTMENT INC NEW	AT COST	0	0
EASTGROUP PROPERTIES INC	AT COST	0	0
EQUITY RESIDTL PPTY	AT COST	0	0
ESSEX PROPERTY TRUST	AT COST	0	0
EXTRA SPACE STORAGE INC	AT COST	0	0
FEDERAL REALTY INVS TRUST	AT COST	0	0
HCP INC	AT COST	0	0
HEALTHCARE REALTY TRUST INC	AT COST	0	0
HIGHWOODS PPTYS INC COM	AT COST	0	0
HOSPITALITY PPTYS TR COM SH BEN INT	AT COST	0	0
HOST HOTELS & RESORTS INC	AT COST	0	0
INLAND REAL ESTATE CORP	AT COST	0	0
KILROY REALTY CORPORATION	AT COST	0	0
KIMCO REALTY CORPORATION	AT COST	0	0
LASALLE HOTEL PROPERTIES	AT COST	0	0
LIBERTY PROPERTY TRUST	AT COST	0	0
MACERICH COMPANY	AT COST	0	0
MACK-CALI REALTY CORP	AT COST	0	0
NATIONWIDE HEALTH PROPERTIES	AT COST	0	0
PS BUSINESS PARKS INC/CA	AT COST	0	0
POST PROPERTIES INC.	AT COST	0	0
PUBLIC STORAGE INC	AT COST	0	0
REGENCY CENTERS CORP	AT COST	0	0
SL GREEN REALTY CORP	AT COST	0	0
SIMON PROPERTY GROUP INC	AT COST	0	0
STRATEGIC HOTELS & REPORTS I	AT COST	0	0
SUNSTONE HOTEL INVESTORS INC	AT COST	0	0
TANGER FACTORY OUTLET CENTER	AT COST	0	0
UDR INC	AT COST	0	0
U-STORE-IT TRUST	AT COST	0	0
VENTAS INC	AT COST	0	0
VORNADO REALTY TRUST REALTY TRUST	AT COST	0	0
WASHINGTON R EST IN TRUST SH BEN INT	AT COST	0	0
WEINGARTEN REALTY INVESTORS	AT COST	0	0
AMG NATIONAL TRUST BANK SWEEP	AT COST	0	0
3M CO	AT COST	8,603	11,243
AMG NATIONAL TRUST BANK SWEEP	AT COST	26,188	26,188
AT&T INC	AT COST	12,800	14,127
BANK OF AMERICA CORP AMERICA CORPORATION	AT COST	0	0
BP AMOCO PLC	AT COST	9,938	9,913
BRISTOL MYERS SQUIBB CO COM	AT COST	0	0
CHARLES SCHWAB CORP	AT COST	10,034	9,636
CHUNGHWA TELECOM LTD-ADR	AT COST	3,580	3,974
COCA-COLA CO	AT COST	7,110	9,405
CONOCOPHILLIPS	AT COST	10,020	11,031
DUKE ENERGY HLDG CORP	AT COST	12,419	11,875
ELI LILLY & CO	AT COST	6,674	6,928
EMERSON ELECTRIC CO	AT COST	8,631	11,033
EXXON MOBIL CORP COM	AT COST	13,462	12,547
FIRSTENERGY CORP COM	AT COST	8,490	9,058
FOOT LOCKER INC.	AT COST	13,427	14,270
GENERAL ELEC CO COM	AT COST	22,527	10,198
GLAXO SMITHKLINE PLC ADR	AT COST	22,199	19,351
HOME DEPOT	AT COST	6,875	7,522
INTEL CORP	AT COST	11,594	15,280
JPMORGAN CHASE & CO & CO	AT COST	14,320	12,668
KIMBERLY-CLARK CORP KIMBERLY CLARK CORP	AT COST	9,606	10,321
KRAFT FOODS INC	AT COST	14,526	13,672
MCDONALDS CORP COM	AT COST	6,469	7,368
MERCK & CO. INC.	AT COST	4,819	5,700
MICROSOFT CORPORATION	AT COST	0	0
NOKIA CORPORATION	AT COST	11,630	9,792
NUCOR CORP	AT COST	0	0
PFIZER COMMON STOCK	AT COST	22,336	16,717
PHILIP MORRIS INTERNATIONAL	AT COST	9,509	11,807
PITNEY BOWES INCORPORATED	AT COST	0	0
SANOFI-SYNTHELABO SA ADR	AT COST	5,614	7,147
TAIWAN SEMICONDUCTOR ADR	AT COST	12,289	13,259
TELECOMMUNICACOES DE S P-ADR	AT COST	6,187	6,817
THE CHARLES SCHWAB CORP	AT COST	0	0
TIME WARNER CABLE	AT COST	7,433	9,396
TOTAL SA-SPON ADR	AT COST	4,527	5,507
TURKCELL ILETISIM HIZMET ADR	AT COST	4,831	5,142
US BANCORP DEL COM NEW	AT COST	0	0
WELLS FARGO & COMPANY	AT COST	0	0
WEYERHAEUSER CO COM	AT COST	0	0

TY 2009 Other Income Schedule

Name: JW JOHNSON FAMILY CHARITABLE TRUST

EIN: 20-7203295

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FEDERAL REFUND	17,017	17,017	17,017

TY 2009 Other Professional Fees Schedule

Name: JW JOHNSON FAMILY CHARITABLE TRUST

EIN: 20-7203295

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MGT FEES	1,295	1,295		0

TY 2009 Taxes Schedule

Name: JW JOHNSON FAMILY CHARITABLE TRUST

EIN: 20-7203295

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	165	165		0