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

OMB No 1545-0052

**2009**

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>The Loftus Family Foundation</b>		A Employer identification number <b>20-8067422</b>
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) <b>(800) 839-1754</b>
	c/o Foundation Source, 501 Silverside Road		
	City or town, state, and ZIP code <b>Wilmington DE 19809-1377</b>		
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			C If exemption application is pending, check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 6,972,991</b>			D 1. Foreign organizations, check here <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	61	61		
	4 Dividends and interest from securities	56,915	56,915		
	5 a Gross rents				
	b Net rental income or (loss)				
	6 a Net gain or (loss) from sale of assets not on line 10	6,818			
	b Gross sales price for all assets on line 6a <b>130,883</b>				
	7 Capital gain net income (from Part IV, line 2)		6,818		
	8 Net short-term capital gain				
	9 Income modifications				
	10 a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	63,794	63,794			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16 a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	397	97		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	29,404	5		29,399
	24 Total operating and administrative expenses. Add lines 13 through 23	29,801	102		29,399
	25 Contributions, gifts, grants paid	319,900			319,900
26 Total expenses and disbursements. Add lines 24 and 25	349,701	102		349,299	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-285,907				
b Net investment income (if negative, enter -0-)		63,692			
c Adjusted net income (if negative, enter -0-)					

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

Form 990-PF (2009)

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<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	6,711,754	4,953,229	4,953,229
	<b>3</b> Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	<b>4</b> Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10 a</b> Investments—U S and state government obligations (attach schedule)		319,495	338,643
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	411,181	1,564,304	1,681,119
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b> Investments—land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
<b>15</b> Other assets (describe ▶)				
<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .	7,122,935	6,837,028	6,972,991	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶) <b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> ▶ <input type="checkbox"/>			
	<b>24</b> Unrestricted . . . . .			
	<b>25</b> Temporarily restricted . . . . .			
	<b>26</b> Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> ▶ <input checked="" type="checkbox"/>			
	<b>27</b> Capital stock, trust principal, or current funds . . . . .			
	<b>28</b> Paid-in or capital surplus, or land, bldg., and equipment fund . . . . .			
	<b>29</b> Retained earnings, accumulated income, endowment, or other funds . . . . .	7,122,935	6,837,028	
<b>30</b> <b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	7,122,935	6,837,028		
<b>31</b> <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	7,122,935	6,837,028		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	7,122,935
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-285,907
<b>3</b> Other increases not included in line 2 (itemize) ▶	<b>3</b>	0
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	6,837,028
<b>5</b> Decreases not included in line 2 (itemize) ▶	<b>5</b>	0
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	6,837,028

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a Publicly-traded Securities</b>		P	Various	Various
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
<b>a</b> 130,883		124,065	6,818	
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2 Capital gain net income or (net capital loss)</b> { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			<b>2</b>	6,818
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b> If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8			<b>3</b>	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	155,533	7,037,798	0.022100
2007	115,921	5,531,467	0.020957
2006	0	985,545	0.000000
2005			0.000000
2004			0.000000
<b>2 Total of line 1, column (d)</b>			<b>2</b> 0.043057
<b>3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years</b>			<b>3</b> 0.014352
<b>4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5</b>			<b>4</b> 6,958,985
<b>5 Multiply line 4 by line 3</b>			<b>5</b> 99,875
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>			<b>6</b> 637
<b>7 Add lines 5 and 6</b>			<b>7</b> 100,512
<b>8 Enter qualifying distributions from Part XII, line 4</b> If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.			<b>8</b> 349,299

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

1 a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b _____	1	637
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	637
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- _____	5	637
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 _____	6a	3,555
b	Exempt foreign organizations—tax withheld at source _____	6b	
c	Tax paid with application for extension of time to file (Form 8868) _____	6c	0
d	Backup withholding erroneously withheld _____	6d	
7	Total credits and payments. Add lines 6a through 6d _____	7	3,555
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached _____	8	0
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> _____	9	0
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> _____	10	2,918
11	Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> 700 <b>Refunded</b> <input checked="" type="checkbox"/> _____	11	2,218

**Part VII-A Statements Regarding Activities**

1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? _____	Yes	No
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)? _____ If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1b			X
c	Did the foundation file <b>Form 1120-POL</b> for this year? _____		X
1c			X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ _____		
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
4b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? _____	4b	N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? _____ If "Yes," attach the statement required by General Instruction T.	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) <input type="checkbox"/> DE _____		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation _____	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)**

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

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
<b>1a</b>	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	<b>1b</b>	N/A
<b>c</b>	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?	<b>1c</b>	X
<b>2</b>	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))		
<b>a</b>	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/> 20 _____, 20 _____, 20 _____, 20 _____		
<b>b</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.)	<b>2b</b>	N/A
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/> 20 _____, 20 _____, 20 _____, 20 _____		
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</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)	<b>3b</b>	N/A
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	X
<b>b</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?	<b>4b</b>	X

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐

5b N/A

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? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870

6b X

**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? ☐ Yes ☒ No

7b N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

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

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

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

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

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

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

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

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments. See page 24 of the instructions.	
3	
<b>Total.</b> Add lines 1 through 3	0



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	1,191,941
<b>b</b>	Average of monthly cash balances	<b>1b</b>	5,873,018
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions)	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	7,064,959
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	7,064,959
<b>4</b>	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	105,974
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	6,958,985
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	347,949

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	347,949
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	637
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	637
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	347,312
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0
<b>5</b>	Add lines 3 and 4	<b>5</b>	347,312
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	347,312

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	<b>1a</b>	349,299
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	349,299
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	637
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	348,662

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7 . . . . .				347,312
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only . . . . .			349,252	
<b>b</b> Total for prior years 20____, 20____, 20____ . . . . .		0		
<b>3</b> Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004 . . . . .				
<b>b</b> From 2005 . . . . .				
<b>c</b> From 2006 . . . . .				
<b>d</b> From 2007 . . . . .				
<b>e</b> From 2008 . . . . .				
<b>f</b> Total of lines 3a through e . . . . .	0			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ <u>349,299</u>				
<b>a</b> Applied to 2008, but not more than line 2a . . . . .			349,252	
<b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions) . . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions) . . . . .				
<b>d</b> Applied to 2009 distributable amount . . . . .				47
<b>e</b> Remaining amount distributed out of corpus . . . . .	0			
<b>5</b> Excess distributions carryover applied to 2009 . . . . . (If an amount appears in column (d), the same amount must be shown in column (a) )	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 . . . . .	0			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions . . . . .		0		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions . . . . .			0	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010 . . . . .				347,265
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .				
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	0			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	0			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005 . . . . .	0			
<b>b</b> Excess from 2006 . . . . .	0			
<b>c</b> Excess from 2007 . . . . .	0			
<b>d</b> Excess from 2008 . . . . .	0			
<b>e</b> Excess from 2009 . . . . .	0			



**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
<b>a</b> Paid during the year SEE ATTACHMENT				
<b>Total</b>			<b>3a</b>	319,900
<b>b</b> Approved for future payment NONE				
<b>Total</b>			<b>3b</b>	

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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 )
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b>	Program service revenue					
<b>a</b>	_____					
<b>b</b>	_____					
<b>c</b>	_____					
<b>d</b>	_____					
<b>e</b>	_____					
<b>f</b>	_____					
<b>g</b>	Fees and contracts from government agencies					
<b>2</b>	Membership dues and assessments					
<b>3</b>	Interest on savings and temporary cash investments			14	61	
<b>4</b>	Dividends and interest from securities			14	56,915	
<b>5</b>	Net rental income or (loss) from real estate:					
<b>a</b>	Debt-financed property					
<b>b</b>	Not debt-financed property					
<b>6</b>	Net rental income or (loss) from personal property					
<b>7</b>	Other investment income					
<b>8</b>	Gain or (loss) from sales of assets other than inventory			18	6,818	
<b>9</b>	Net income or (loss) from special events					
<b>10</b>	Gross profit or (loss) from sales of inventory					
<b>11</b>	Other revenue <b>a</b> _____					
<b>b</b>	_____					
<b>c</b>	_____					
<b>d</b>	_____					
<b>e</b>	_____					
<b>12</b>	Subtotal. Add columns (b), (d), and (e)		0		63,794	0
<b>13</b>	Total. Add line 12, columns (b), (d), and (e)				13 63,794	63,794

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

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

[illegible]



The Loftus Family Foundation  
EIN: 20-8067422  
Taxable Year Ending December 31, 2009

Form 990-PF, Part I, Line 18 – Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
ESTIMATED TAX FOR 2009	\$300	\$0	-	\$0
FOREIGN TAX PAID	\$97	\$97	-	\$0
TOTAL:	\$397	\$97	-	\$0

**The Loftus Family Foundation**  
**EIN: 20-8067422**  
**Taxable Year Ending December 31, 2009**

**Form 990-PF, Part I, Line 23 – Other expenses**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
ADMINISTRATIVE FEES	\$29,399	\$0	-	\$29,399
BANK CHARGE	\$5	\$5	-	\$0
<b>TOTAL:</b>	<b>\$29,404</b>	<b>\$5</b>	<b>-</b>	<b>\$29,399</b>



The Loftus Family Foundation  
EIN: 20-8067422  
Taxable Year Ending December 31, 2009

**Form 990-PF, Part II, Line 10a - Columns (b) & (c) -- U.S. and State Government Obligations**

Shares	Description/Symbol/CUSIP Number	Line 10a - Column (b) Book Value	Line 10a - Column (c) Fair Market Value
263167	US TIPS - 3.875% - 04/15/2029 (912810FH6)	\$319,494.63	\$338,643.20
TOTAL:		\$319,495	\$338,643

The Loftus Family Foundation

EIN: 20-8067422

Taxable Year Ending December 31, 2009

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

Shares	Description/Symbol	Line 10b - Column (b) Book Value	Line 10b - Column (c) Fair Market Value
500	BYD CO LTD UNSP/ADR (BYDDY PK)	\$28,883.95	\$43,670.00
140	CERADYNE, INC. - COMMON STOCK (CRDN)	\$10,039.55	\$2,690.80
180	Crocs Inc (CROX)	\$9,966.75	\$1,035.00
1650	ISHARES MSCI PACIFIC EX-JAPAN (EPP)	\$71,379.95	\$68,260.50
6000	ISHARES MSCI-JAPAN (EWJ)	\$71,468.16	\$58,440.00
1500	ISHARES TR FTSE XINHAI HK CHINA 25 (FXI)	\$68,077.95	\$63,390.00
1500	STREETTRACKS GOLD SHARES (GLD)	\$129,875.95	\$160,965.00
160	MOBILE TELSYS OJSC (MBT)	\$9,976.35	\$7,822.40
2000	PIMCO ENHANCED SHORT MATURITY STRATEGY FD COMMON ST (MINT)	\$200,041.33	\$200,192.41
357	MICROSOFT CORPORATION (MSFT)	\$10,347.52	\$10,868.10
160	Arcelor Mittal (MT)	\$10,008.35	\$7,320.00
181	NIKE INC-CL B (NIKE)	\$10,356.98	\$11,986.21
37764	PIMCO GLOBAL MULTI-ASSET FUND INSTI CLASS (PGAIX)	\$372,724.24	\$414,643.48
3548	POWERSHARES QQQ NASDAQ 100 (QQQQ)	\$139,516.31	\$162,321.00
1426	SPDR TR UNIT SER 1 (SPY)	\$139,498.84	\$158,913.44
2300	VERIZON COMMUNICATIONS (VZ)	\$69,721.95	\$76,199.00
480	Western Digital Corp (WDC)	\$10,045.99	\$21,192.00
6809	Select Sector Spdr Utilities (XLU)	\$202,373.93	\$211,209.29
<b>TOTAL:</b>		<b>\$1,564,304</b>	<b>\$1,681,119</b>

**The Loftus Family Foundation**

**EIN: 20-8067422**

**Taxable Year Ending December 31, 2009**

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

(a) - Name and address	(b) - Title, and average hours per week devoted to position	(c) - Compensation	(d) - Contributions to employee benefit plans and deferred compensation	(e) - Expense account, other allowances
John Loftus c/o Foundation Source 501 Silverside Road Suite 123 Wilmington, DE 19809-1377	President / Director / Secretary 10 hour(s) per week	\$0.00	\$0.00	\$0.00

**The Loftus Family Foundation**  
**EIN: 20-8067422**  
**Taxable Year Ending December 31, 2009**

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

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ADVOCATES FOR FAITH & FREEDOM INC 24910 LAS BRISAS RD STE 110, MURRIETA, CA 92562	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$6,000.00
AMERICAN GUILD OF ORGANISTS AGO 475 RIVERSIDE DR STE 1260, NEW YORK, NY 10115-0055	N/A	509(a)(1)	AGO ANNUAL FUND	\$500.00
AMERICAN HARP SOCIETY 624 CRYSTAL AVE, FINDLAY, OH 45840-4653	N/A	509(a)(2)	ORANGE COUNTY CHAPTER DIVISION	\$1,000.00
AMERICAN LIVER FOUNDATION 1425 POMPTON AVE, CEDAR GROVE, NJ 07009-1043	N/A	509(a)(1)	LIVER LIFE WALK INITIATIVE	\$100.00
AVON WALK FOR BREAST CANCER ONE AVON PLAZA, RYE, NY 10580-4005	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$250.00
BARNABAS GROUP INC 2322 N BATAVIA ST STE 108, ORANGE, CA 92865-2000	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$1,500.00
BILLY GRAHAM EVANGELISTIC ASSOCIATION PO BOX 688129, CHARLOTTE, NC 28266-8129	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$2,000.00
CAL STATE FULLERTON PHILANTHROPIC FOUNDATION 2600 E NUTWOOD AVE, FULLERTON, CA 92831-3145	N/A	509(a)(1)	RENOVATION OF THE BIGGS SCHLICKEER ORGAN AND ITS INSTALLATION IN MENG HALL	\$20,000.00

**The Loftus Family Foundation**  
**EIN: 20-8067422**  
**Taxable Year Ending December 31, 2009**

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

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CALVARY CHAPEL OF COSTA MESA 3800 S FAIRVIEW ST, SANTA ANA, CA 92704-7014	N/A	509(a)(1)	CALVARY CHAPEL HIGH SCHOOL BOOSTERS PROGRAM	\$5,000 00
CALVARY CHAPEL OF COSTA MESA 3800 S FAIRVIEW ST, SANTA ANA, CA 92704-7014	N/A	509(a)(1)	CALVARY CHAPEL SCHOOLS' SCHOLARSHIP	\$10,000 00
CAMPUS CRUSADE FOR CHRIST INTERNATIONAL 100 LAKE HART DRIVE 3500, ORLANDO, FL 32832-0100	N/A	509(a)(1)	GLOBAL MEDIA OUTREACH PROGRAM	\$50,000 00
CHAMPION MINISTRIES INC PO BOX 1323, CASTLE ROCK, CO 80104-1323	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$10,000 00
CHORUS AMERICA ASSOC OF PROFESSIONAL VOCAL ENSEMBLES 1156 15TH ST NW STE 310, WASHINGTON, DC 20005-1747	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$1,000 00
CHRISTIAN CHILDRENS FUND INC 2821 EMERYWOOD PARKWAY, RICHMOND, VA 23294-3726	N/A	509(a)(2)	GENERAL & UNRESTRICTED	\$1,000 00
COMMITTEE FOR A CONSTRUCTIVE TOMORROW PO BOX 65722, WASHINGTON, DC 20035-5722	N/A	509(a)(1)	ALL PAIN/NO GAIN CAMPAIGN	\$10,000 00
COMMUNITY ACTION PARTNERSHIP OF ORANGE COUNTY 12640 KNOTT ST, GARDEN GROVE, CA 92841-3902	N/A	509(a)(1)	CHARITABLE EVENT	\$1,000 00

**The Loftus Family Foundation**  
**EIN: 20-8067422**  
**Taxable Year Ending December 31, 2009**

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

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CROSSING CHURCH 2115 NEWPORT BLVD, COSTA MESA, CA 92627-1703	N/A	509(a)(1)	UGANDA TRAVEL EXPENSES PROJECT	\$1,500 00
CYSTIC FIBROSIS FOUNDATION HEADQUARTERS 6931 ARLINGTON RD STE 200, BETHESDA, MD 20814-5269	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$100 00
INJURED MARINE SEMPER FI FUND PO BOX 555193, CMP PENDLETON, CA 92055-5193	N/A	509(a)(1)	CHARITABLE EVENT	\$1,000 00
LEUKEMIA & LYMPHOMA SOCIETY INC 1311 MAMARONECK AVENUE, WHITE PLAINS, NY 10605-5221	N/A	509(a)(1)	CHARITABLE EVENT	\$250 00
MARINERS CHURCH 5001 NEWPORT COAST DR, IRVINE, CA 92603-0164	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$56,000 00
MUSIC MISSION INTERNATIONAL 60 SCARLET BLOOM, IRVINE, CA 92618-8808	N/A	509(a)(1)	FIRST BAPTIST CHURCH ORGAN TUNING PROJECT	\$500 00
ORANGE COUNTY PERFORMING ARTS CENTER 600 TOWN CENTER DR, COSTA MESA, CA 92626	N/A	509(a)(2)	GENERAL & UNRESTRICTED	\$2,500 00
PACIFIC CHORALE 3621 S. HARBOR BLVD, SANTA ANA, CA 92704-6902	N/A	509(a)(2)	GENERAL & UNRESTRICTED	\$25,000 00

**The Loftus Family Foundation**  
**EIN: 20-8067422**  
**Taxable Year Ending December 31, 2009**

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

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PACIFIC CHORALE 3621 S HARBOR BLVD, SANTA ANA, CA 92704-6902	N/A	509(a)(2)	CHARITABLE EVENT	\$15,000 00
PACIFIC SYMPHONY 3631 S HARBOR BLVD STE 100, SANTA ANA, CA 92704-8908	N/A	509(a)(2)	GENERAL & UNRESTRICTED	\$30,000 00
PACIFIC SYMPHONY 3631 S HARBOR BLVD STE 100, SANTA ANA, CA 92704-8908	N/A	509(a)(2)	COMPLETION AND PROGRAMMING OF THE WILLIAM J GILLESPIE ORGAN PROJECT	\$10,000 00
PRIORITY LIVING INC 2322 N BATAVIA ST STE 108, ORANGE, CA 92865-2000	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$8,000 00
SAMARITANS PURSE PO BOX 3000, BOONE, NC 28607-3000	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$1,500 00
SOUTHERN CALIFORNIA CHILDRENS CHORAL ASSOCIATION 5020 CAMPUS DR, NEWPORT BEACH, CA 92660-2120	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$20,000 00
SOUTHERN CALIFORNIA CHILDRENS CHORAL ASSOCIATION 5020 CAMPUS DR, NEWPORT BEACH, CA 92660-2120	N/A	509(a)(1)	MINI-GOLF TOUR FUND	\$500 00
SOUTHERN CALIFORNIA CHILDRENS CHORAL ASSOCIATION 5020 CAMPUS DR, NEWPORT BEACH, CA 92660-2120	N/A	509(a)(1)	CHARITABLE EVENT	\$100 00

**The Loftus Family Foundation**  
**EIN: 20-8067422**  
**Taxable Year Ending December 31, 2009**

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

Recipient name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SOUTHWEST COMMUNITY CHURCH 77701 FRED WARING DR, INDIAN WELLS, CA 92210-6800	N/A	509(a)(1)	BRAZIL OUTREACH TO THE DAVIS LAR PROJECT	\$500 00
STANFORD UNIVERSITY GRADUATE SCHOOL OF BUSINESS OFFICE OF DEVELOPMENT, ROOM 5239, 518 MEMORIAL WAY, STANFORD, CA 94305-5015	N/A	509(a)(1)	JAMES C VAN HORNE FUND FOR FINANCE FACULTY	\$20,000 00
SUSAN G KOMEN BREAST CANCER FOUNDATION 3191 AIRPORT LOOP DR STE A, COSTA MESA, CA 92626-3404	N/A	509(a)(1)	CHARITABLE EVENT	\$100 00
THE SANTA ANA COLLEGE STUDENT NURSES ASSOCIATION (SACSNAA) 2323 N BROADWAY, RM 407-1, SANTA ANA, CA 92706-1433	N/A	509(a)(1)	CHARITABLE EVENT	\$2,500 00
VALLEY CHRISTIAN SCHOOL SYSTEM 10818 ARTESIA BLVD, CERRITOS, CA 90703-2628	N/A	509(a)(1)	GENERAL & UNRESTRICTED	\$5,000 00
YOUNG LIFE 420 N CASCADE AVE, COLORADO SPRINGS, CO 80903-3325	N/A	509(a)(1)	NEWPORT-MESA AREA CA410 PROGRAM	\$500 00
TOTAL:				\$319,900