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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
R & R Foundation Inc

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
221 Sherwood Drive

City or town, state, and ZIP code
Bradenton, FL 34210

A Employer identification number
22-2608869

B Telephone number (see page 10 of the instructions)
(941) 758-5010

C If exemption application is pending, check here ▶ ☐
D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 441,869

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	7,061			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	7,183	7,183		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	19,494			
	b	Gross sales price for all assets on line 6a 41,280				
	7	Capital gain net income (from Part IV, line 2)		19,494		
	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)	-983	0		
	12	**Total.** Add lines 1 through 11	32,755	26,677		
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)	2,780	2,780		0
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	75	75		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	763	763		0
	22	Printing and publications				
	23	Other expenses (attach schedule)	2,425	2,425		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	6,043	6,043		0
	25	Contributions, gifts, grants paid	21,210			21,210
	26	**Total expenses and disbursements.** Add lines 24 and 25	27,253	6,043		21,210
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	5,502			
	b	**Net investment income** (if negative, enter -0-)		20,634		
	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	33,270	24,675	24,675
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 20,407 Less allowance for doubtful accounts ▶	20,407	20,407	20,407
	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)	261,950	277,629	361,787
	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)	36,582	35,000	35,000
	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)	352,209	357,711	441,869
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	352,209	357,711	
	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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	352,209	357,711	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	352,209	357,711	

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	352,209
2	Enter amount from Part I, line 27a	2	5,502
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	357,711
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	357,711

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)
1 a	BROADRIDGE FINANCIAL	P	2004-01-26	2009-12-21
b	BAXTER INTL	P	2003-07-23	2009-12-21
c	EQT CORP	P	1991-06-27	2009-12-21
d	HAIN CELESTIAL GROUP	P	2003-08-26	2009-12-21
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	1,303		1,224	79
b	11,624		5,360	6,264
c	17,529		2,524	15,005
d	10,824		12,678	-1,854
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				79
b				6,264
c				15,005
d				-1,854
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	19,494
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	26,020	468,502	0 055539
2007	38,302	623,415	0 061439
2006	32,752	551,437	0 059394
2005	25,945	474,619	0 054665
2004	15,820	486,036	0 032549

2	**Total** of line 1, column (d).	2	0 263586
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 052717
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	357,056
5	Multiply line 4 by line 3.	5	18,823
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	206
7	Add lines 5 and 6.	7	19,029
8	Enter qualifying distributions from Part XII, line 4.	8	21,210

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	206
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	206
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	206
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	80		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	126		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	206
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	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶	**Refunded** ▶		11	

Part VII-A Statements Regarding Activities

		Line	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) ▶ FL			
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)

			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 ▶Marie Hausman Telephone no ▶(941) 758-5010

Located at ▶224 Sherwood Drive Bradenton FL ZIP+4 ▶34210

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.

			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 N/A	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	
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	310,686
b	Average of monthly cash balances	1b	31,400
c	Fair market value of all other assets (see page 24 of the instructions)	1c	20,407
d	**Total** (add lines 1a, b, and c)	1d	362,493
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	362,493
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	5,437
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	357,056
6	**Minimum investment return.** Enter 5% of line 5	6	17,853

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	17,853
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 206		
b	Income tax for 2009 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	206
3	Distributable amount before adjustments Subtract line 2c from line 1	3	17,647
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	17,647
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	17,647

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	21,210
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	21,210
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	206
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	21,004

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				17,647
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. 2,418				
c From 2006. 5,376				
d From 2007. 7,589				
e From 2008. 2,755				
f **Total** of lines 3a through e.	18,138			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 21,210				
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.				17,647
e Remaining amount distributed out of corpus	3,563			
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	21,701			
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	21,701			
10 Analysis of line 9				
a Excess from 2005. . . . 2,418				
b Excess from 2006. . . . 5,376				
c Excess from 2007. . . . 7,589				
d Excess from 2008. . . . 2,755				
e Excess from 2009. . . . 3,563				

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

Marie Hausman
221 sherwood drive
bradenton, FL 34210
(941) 758-5010

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

Include an outline of proposed investigation and proposed budget

c Any submission deadlines

None

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

None

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**				21,210
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 (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	7,183	
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					
8 Gain or (loss) from sales of assets other than inventory			18	19,494	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a Interest Vermont Loans			14	600	
b loss on Farmers Diner			14	-1,583	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		25,694	0

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 25,694

(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

******	2010-09-01	******
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	Robert L Miller CPA	2010-09-01		
Firm's name (or yours if self-employed), address, and ZIP code	CPA ASSOCIATES 1301 SIXTH AVENUE WEST SUITE 600 BRADENTON, FL 342057440		EIN Phone no (941) 747-4483	

Additional Data

Software ID: 09000028
Software Version: 2009.04020
EIN: 22-2608869
Name: R & R Foundation Inc

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
Marie E Hausman 221 Sherwood Drive Bradenton, FL 34210	President 0 00	0	0	0
Robert J Hausman 334 Meads Mountain Road Woodstock, NY 12498	Vice President 0 00	0	0	0
Richard D Hausman RD 1 Jefferson Hill S Ryegate, VT 05069	Treasurer 0 00	0	0	0
Joy Hopkins-Hausman 334 Meads Mountain Road woodstock, NY 12498	Asst Treasurer 0 00	0	0	0
Emily R Hausman RD 1 Jefferson Hill S Ryegate, VT 05069	Secretary 0 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*				
ACLU125 BROAD ST 18TH FL NEW YORK, NY 10004	N/A	PUblic Charity	CIVIL LIBERTY	150
AFSC1501 CHERRY STREET PHILADELPHIA, PA 191021403	n/A	public Charity	PEACE AND JUSTICE	100
AMERICAN INSTITUTE OF PHILANTHROPYPO BOX 578460 CHICAGO, IL 606578460	n/A	Public Charity	EDUCATION	100
ANTIOCH COLLEGEONE MORGAN PLACE YELLOW SPRINGS, OH 45387	n/A	PUblic Charity	EDUCATION	250
BREaST CANCER OPTIONS INC101 HURLEY AVE STE 10 KINGSTON, NY 12401	N/A	Public Charity	HEALTH	500
CENTER FOR WOODLANDS EDUCATION1776 Center Rd PO Box 471 Corinth, VT 05039	N/A	Public Charity	EDUCATION	200
CHITTENDEN EMERGENCY FOOD SHELF228 NORTH WINOOSKI AVE BURLINGTON, VT 05401	n/A	Public Charity	POVERTY/HURRICANE RELIEF	500
CLEARWATER INC112 Little Market St Poughkeepsie, NY 12601	N/A	Public Charity	environment	1,000
COALITION FOR JUSTICE IN THE MAQUILADORAS3611 GOLDEN TREE LN MISSOURI CITY, TX 77459	N/A	Public Charity	CIVIL LIBERTY	150
CREATIVE MUSIC FOUNDATION INCPO Box 671 WoodSTOCK, NY 12698	N/A	Public Charity	EDUCATION	100
Earth Justice426 17th St Oakland, CA 94612	n/A	public Charity	environment	100
ENVIRONMENTAL DEFENSE FOUNDATION257 Park Ave S New York, NY 10010	N/A	Public Charity	environment	150
Farm & Wilderness Foundation263 Farm Wilderness Road Plymouth, VT 05056	n/A	public Charity	environment	1,200
FCNL Education Fund245 Second St NE Washington, DC 20002	n/A	public Charity	Children	100
FONKOZE USA50 F St NW St 810 washington, DC 20001	N/A	Public Charity	weLFARE	500
Total . . . . ▶ 3a				21,210

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*				
GOMPERS CHARTER MIDDLE SCHOOL1005 47th St San Diego, CA 92102	N/A	Public Charity	EdUCATION	200
Greater Burlington YMCA266 College St BurliNGTON, VT 05401	N/A	Public Charity	eDUCATION	500
HAiTIAN PEOPLE'S SUPPORT PROJECTPO BOX 496 WOODSTOCK, NY 12498	n/A	public Charity	WELFARE	2,150
Inst for Policy Studies112 16th St NW Suite 600 Washington, DC 20036	n/A	public Charity	Health/Education	250
JUST FOR GIRLS3809 39th St W BradENTON, FL 34209	N/A	Public Charity	EdUCATION	100
LOCAL MOTION1 STEELE STREET 103 BURLINGTON, VT 05401	n/A	public Charity	CIVIC ENGAGEMENT	500
LYVEF45 MAIN ST STE 628 BROOKLYN, NY 11201	N/A	PUBlic Charity	EDUcation	1,000
MADRE149 State St Montpelier, VT 05602	N/A	Public Charity	civil LIBERTY	200
National Wildlife Federation11100 Wildlife Center Dr Reston, VA 20190	n/A	public Charity	Environment	100
Nature Conservancy4245 N Fairfax Drive Suite 100 Arlington, VA 22203	n/A	public Charity	environment	100
NORTHWEST ENVIRONMENTAL DEFENSE CTR10015 SW TERWILLIGER BLVD PORTLAND, OR 97219	N/A	Public Charity	ENVironment	200
NUCLEAR INFORMATION AND RESEARCH SERVICE6930 CARROLL AVE STE 340 TAKOMA PARK, MD 20912	N/A	Public Charity	EDUCATION	100
PEOPLE FOR THE AMERICAN WAY 2000 M STREET NW STE 400 WAshington, DC 20036	N/A	PUblic Charity	CIVIL LIBERTY	100
PHYSICIANS FOR SOCIAL RESP 1875 Connecticut Ave NW Ste 1012 Washington, DC 20009	N/A	Public Charity	EdUCATION	100
Planned Parenthood Foundation434 West 33rd St New York, NY 10001	n/A	public Charity	education	250
Total . . . . ▶ 3a				21,210

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*				
PLANNED PARENTHOOD SW CENT FL2055 WOOD STREET SARASOTA, FL 34232	n/A	public Charity	HEALTH	100
PROJECT VOTE SMARTONE COMMON GROUND PHILLPSBURG, MT 59858	n/A	public Charity	EDUCATION	100
PUBLIC ASSETS INSTITUTE149 State St Montpelier, VT 05602	N/A	Public Charity	civil lIBERTY	500
SADIE NASH LEADERSHIP PROJECT 157 Montague St BrooKLYN, NY 11207	N/A	Public Charity	EdUCATION	1,000
SAVE DARFUR COALITION2120 L ST NW WAshington, DC 20037	N/A	PUBlic Charity	EDucation	100
SIERRA CLUB FOUNDATION408 C St NE Washington, DC 20002	N/A	Public Charity	Environment	100
SOUTHERN POVERTY LAW CENTER 400 Washington Ave Montgomery, AL 36104	N/A	Public Charity	civil LIBERTY	100
THE LIBRARY FOUNDATION1301 BARROCOTTA BLVD BRADENTON, FL 34205	N/A	Public Charity	EDUcation	100
TIDES CENTER1014 TOURNEY AVE SAN Francisco, CA 94129	N/A	PUblic Charity	SOCIAL Justice	150
US CAMPAIGN FOR BURMA1444 N ST NW STE A2 WAShington, DC 20005	n/A	public Charity	HUMan Rights	2,000
VETERANS EDUCATION PROJECT PO Box 416 Amherst, MA 01004	N/A	Public Charity	EDUCATION	100
VIDA VERDE NATURE EDUCATION 1043 TUNITAS CREED RD HALF MOON BAY, CA 94019	n/A	public Charity	Education	2,200
WEDU PUBLIC TV1300 N BOULEVARD TAMPA, FL 33607	n/A	public Charity	EDUcation	100
WOMENS COMMUNITY CLINIC2166 HAYES ST 104 SAN Franciso, CA 94117	n/A	PUblic Charity	WELFARE	1,000
WOODSTOCK LAND CONSERVANCY PO Box 864 WooDSTOCK, NY 12498	N/A	Public Charity	Environment	2,610
Total . . . . ▶ 3a				21,210

TY 2009 Accounting Fees Schedule

Name: R & R Foundation Inc

EIN: 22-2608869

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting and Tax Prep	2,780	2,780		0

TY 2009 Investments Corporate Stock Schedule

Name: R & R Foundation Inc

EIN: 22-2608869

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AGL Resources	11,262	21,882
aqua America	4,004	14,008
Automatic Data Proc	11,433	12,846
Avon Prod Inc	11,488	12,600
baldor Electric	7,776	14,972
baxter Int'l	9,018	17,604
BROADRIDGE FINL SOLUTION	0	0
Cisco Inc	12,810	16,758
Clarcor, Inc	3,667	16,220
Equitable Res Inc	2,406	17,568
FIRST SOLAR INC	10,287	10,155
Hain Celestial Group	0	0
Heinz H J	12,568	18,173
Interface	9,750	12,465
Johnson & Johnson	10,486	12,882
JOHNSON CONTROLS INC	12,413	12,258
kadant Inc	17,761	14,364
McCormick Non Vtg	6,627	21,678
Microsoft Corp	10,164	12,192
modine Mfg Co	16,877	7,104
Patterson Cos Inc	16,800	13,990
Pitney Bowes	12,282	6,828
POWERSHS GLOBAL CLEAN ENERGY	14,765	14,994
Tennant Co	8,710	20,952
TEXAS INSTRUMENTS	14,132	10,424
Timberland Co	16,190	8,965
United National foods	3,656	13,370
Worthington Ind	10,297	6,535

TY 2009 Investments - Other Schedule

Name: R & R Foundation Inc

EIN: 22-2608869

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Farmers Diner LLC	AT COST	0	0
Forestrade	AT COST	25,000	25,000
HOPE COMM CR UNION	AT COST	10,000	10,000

TY 2009 Other Expenses Schedule

Name: R & R Foundation Inc

EIN: 22-2608869

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Expenses	2,319	2,319		0
Office Expense	106	106		0

TY 2009 Other Income Schedule

Name: R & R Foundation Inc

EIN: 22-2608869

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Interest Vermont Loans	600		600
loss on Farmers Diner	-1,583		-1,583

TY 2009 Taxes Schedule

Name: R & R Foundation Inc

EIN: 22-2608869

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Taxes, Secretary of State	75	75		0