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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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 ANDERSON-ROGERS FOUNDATION, INC.		A Employer identification number 22-3052390
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number 212-989-9331
	City or town, state, and ZIP code NEW YORK, NY 10011		C If exemption application is pending, check here <input type="checkbox"/>
			D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
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			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3972597. (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 <input type="checkbox"/>
J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____			

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		172328.	172328.		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		173403.			
b Gross sales price for all assets on line 6a 279200.					
7 Capital gain net income (from Part IV, line 2)			173403.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		345731.	345731.		
13 Compensation of officers, directors, trustees, etc		18000.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees Stmt 2		253.	0.		0.
b Accounting fees Stmt 3		4300.	0.		0.
c Other professional fees					
17 Interest					
18 Taxes Stmt 4		-1568.	0.		0.
19 Depreciation and depletion		125.	0.		
20 Occupancy					
21 Travel, conferences, and meetings		519.	0.		0.
22 Printing and publications		6968.	0.		0.
23 Other expenses Stmt 5		27285.	0.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		55882.	0.		0.
25 Contributions, gifts, grants paid		250544.			250544.
26 Total expenses and disbursements. Add lines 24 and 25		306426.	0.		250544.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		39305.			
b Net investment income (if negative, enter -0-)			345731.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			634671.	779485.	779485.
	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					
	7 Other notes and loans receivable ▶					
	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					
	b Investments - corporate stock Stmt 6			2598822.	3192898.	3192898.
	c Investments - corporate bonds					
Liabilities	11 Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
	12 Investments - mortgage loans					
	13 Investments - other					
	14 Land, buildings, and equipment basis ▶ 2250.					
	Less: accumulated depreciation Stmt 7 ▶ 2036.			339.	214.	214.
	15 Other assets (describe ▶)					
	16 Total assets (to be completed by all filers)			3233832.	3972597.	3972597.
	17 Accounts payable and accrued expenses					
	18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶ Statement 8)			1270.	856.	
23 Total liabilities (add lines 17 through 22)			1270.	856.		
Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	24 Unrestricted			3232562.	3971741.	
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>					
	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			3232562.	3971741.	
31 Total liabilities and net assets/fund balances			3233832.	3972597.		

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	3232562.
2 Enter amount from Part I, line 27a	2	39305.
3 Other increases not included in line 2 (itemize) ▶ FAIR MARKET VALUE ADJUSTMENTS	3	699874.
4 Add lines 1, 2, and 3	4	3971741.
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	3971741.

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	17450 MEDAREX TND	P	04/30/09	08/28/09
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 279200.		105797.	173403.
b			
c			
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			173403.
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	173403.
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) If (loss), enter -0- in Part I, line 8		3	N/A

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 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	268591.	4089709.	.065675
2007	238550.	4800852.	.049689
2006	284148.	4393441.	.064676
2005	203655.	3942005.	.051663
2004	109400.	2527782.	.043279

2 Total of line 1, column (d)	2	.274982
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	.054996
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	3264222.
5 Multiply line 4 by line 3	5	179519.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3457.
7 Add lines 5 and 6	7	182976.
8 Enter qualifying distributions from Part XII, line 4 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.	8	250544.

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

1a	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	3457.
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	3457.
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	3457.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4360.
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	4360.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	903.
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax 903. Refunded 0.	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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
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		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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?		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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) NY		
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	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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses Stmt 9	X	

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Part VII-A Statements Regarding Activities (continued)

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 instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address fdncenter.org/grantmaker/arfdn/	13	X	
14	The books are in care of Sarah A Pope Telephone no. 212-989-9331 Located at 327 W 19th St, NY, NY ZIP+4 10011			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year 15 N/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
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?	<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 checked="" type="checkbox"/> Yes <input 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 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 1b		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? 1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? 2a	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years 2b		
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 instructions.) 2b	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 2c		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 3a	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009? 4b		X

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

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)?

☐ 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 instructions)?

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?

N/A

☐ 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?

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?

N/A

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.

(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
SARAH ANDERSON POPE 327 WEST NINETEENTH ST NEW YORK, NY 10011	PRES, TREASURER 5.00	0.	0.	0.
PORTER W. ANDERSON, JR. PO BOX 378492 KEY LARGO, FL 33037	DIRECTOR, VP, SECY 1.00	0.	0.	0.
CHARLES H. ROGERS 509 MONPONSETT ST HALIFAX, MA 02338	DIRECTOR 1.00	0.	0.	0.
JULIETTE POPE 327 WEST NINETEENTH ST NEW YORK, NY 10011	DIRECTOR 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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 OVER \$50,000	0.00	0.	0.	0.

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE OVER \$50,000		0.

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	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	2711269.
b	Average of monthly cash balances	1b	602662.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	3313931.
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	3313931.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	49709.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3264222.
6	Minimum investment return. Enter 5% of line 5	6	163211.

Part XI Distributable Amount (see 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	163211.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	3457.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3457.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	159754.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	159754.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	159754.

Part XII Qualifying Distributions (see 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	250544.
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	250544.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	3457.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	247087.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				159754.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				8393.
e From 2008				72794.
f Total of lines 3a through e	81187.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$				250544.
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				159754.
e Remaining amount distributed out of corpus	90790.			
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	171977.			
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 instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a. Taxable amount - see instr			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)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	171977.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				8393.
d Excess from 2008				72794.
e Excess from 2009				90790.

N/A

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

- (4) Gross investment income

[illegible]

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	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
Name and address (home or business)				
a Paid during the year SEE ATTACHED SEE ATTACHED	NONE	501(c)(3)	SEE ATTACHED	250544.
Total				250544.
b Approved for future payment				
None				
Total				0.

Enter gross amounts unless otherwise indicated.

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

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
N/A		

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.

Sign Here

Signature of officer or trustee

X | 3/19/10
Date



 Title

Preparer's
signature

Firm's name (or yours
if self-employed),
address, and ZIP code

Virginia Geyer CPA

Virginia L. Goyer, CPA, P.C.

354 Westminster Road

Rochester, NY 14607

Date _____

36/10

Check if self-employed	
------------------------	--

Preparer's identifying number

EIN ►

Phone no (585) 271-6560

Form **990-PF** (2009)

2009 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
5	EQUIPMENT FROM EMERGED CORPORATION	031502SL		5.00	16	1600.			1600.	1573.		0.
6	COPY MACHINE	082407200DB		5.00	17	650.			650.	338.		125.
	* Total 990-PF Pg 1 Depr					2250.		0.	2250.	1911.	0.	125.

Form 990-PF Dividends and Interest from Securities Statement 1

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
MORGAN STANLEY NOMINEE	172328.	0.	172328.
Total to Fm 990-PF, Part I, ln 4	172328.	0.	172328.

Form 990-PF Legal Fees Statement 2

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
LEGAL FEES	253.	0.		0.
To Fm 990-PF, Pg 1, ln 16a	253.	0.		0.

Form 990-PF Accounting Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING FEES	4300.	0.		0.
To Form 990-PF, Pg 1, ln 16b	4300.	0.		0.

Form 990-PF Taxes Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
PAYROLL TAXES	2271.	0.		0.
990PF TAX	-5156.	0.		0.
NYS EPTL FEE	250.	0.		0.
FOREIGN TAXES W/H FROM INVESTMENTS	1067.	0.		0.
To Form 990-PF, Pg 1, ln 18	-1568.	0.		0.

Form 990-PF	Other Expenses	Statement	5
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BANK FEES	330.	0.		0.
INSURANCE	914.	0.		0.
OFFICE SUPPLIES	286.	0.		0.
CONSULTANT	24800.	0.		0.
DUES	955.	0.		0.
 To Form 990-PF, Pg 1, ln 23	 27285.	 0.		 0.

Form 990-PF	Corporate Stock	Statement	6
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Description	Book Value	Fair Market Value
MONGAN STANLEY NOMINEE	3192898.	3192898.
 Total to Form 990-PF, Part II, line 10b	 3192898.	 3192898.

Form 990-PF	Depreciation of Assets Not Held for Investment	Statement	7
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Description	Cost or Other Basis	Accumulated Depreciation	Book Value
EQUIPMENT FROM MERGED CORPORATION	1600.	1573.	27.
COPY MACHINE	650.	463.	187.
 Total To Fm 990-PF, Part II, ln 14	 2250.	 2036.	 214.

Form 990-PF	Other Liabilities	Statement	8
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Description	BOY Amount	EOY Amount
PAYROLL TAXES PAYABLE	1169.	755.
REIMBURSEMENT DUE OFFICER	101.	101.
 Total to Form 990-PF, Part II, line 22	 1270.	 856.

Form 990-PF

List of Substantial Contributors
Part VII-A, Line 10

Statement 9

Name of ContributorAddress

Porter W. Anderson, Jr.

Key Largo, FL 33037

ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

<u>Date</u>	<u>Recipient</u>	<u>Purpose of Grant</u>	<u>Amount</u>
1/23/09	Council on the Environment of New York City 51 Chambers Street, Room 228 New York, NY 10007	To support the Learn It, Grow It, Eat It project in The Bronx, NY.	20,000.00
1/23/09	Union Settlement Association 237 East 104th Street New York, NY 10029	To support the New Populations Initiative.	5,000.00
1/23/09	New York Botanical Garden Bronx, NY 10458-5126	To support the Bronx Green-Up project.	2,000.00
1/23/09	Women's Transitional Living Center P.O. Box 6103 Orange, CA 91863	To support the Center's parenting programs.	5,000.00
1/23/09	Literacy Volunteers of Northern Wyoming 307 South Connor Street Sheridan, WY 82801	To support adult literacy services.	2,000.00
1/23/09	Planned Parenthood League of Massachusetts 1055 Commonwealth Avenue Boston, MA 02215-1001	To support the Get Real sex education program.	10,000.00
1/29/09	Fifth Avenue Community Center of Harlem 253 East 110th Street, #2 New York, NY 10029	To support family services programs in East Harlem.	3,000.00
2/01/09	Fort Washington Collegiate Church 729 West 181st Street New York NY 10033	To support the summer trek program for BSA Troop 729.	5,000.00

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ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

<u>Date</u>	<u>Recipient</u>	<u>Purpose of Grant</u>	<u>Amount</u>
2/01/09	New York Foundation for the Arts 155 Avenue of the Americas, 6th floor New York, NY 10013	To support the Picturing Grace: Florida at First Light photography project.	3,000.00
2/01/09	Fessenden House 236 Warburton Avenue Yonkers, NY 10701-2226	To support home for men with substance abuse and mental health problems.	3,000.00
2/01/09	Big Brothers Big Sisters of Martin County 5033 SE Federal Highway Stuart, FL 34997	To support the Career Skills Mentoring Program.	7,000.00
2/01/09	New York Restoration Project 254 West 31st Street, 10th Floor New York, NY 10001	To support environmental clean-up programs in New York City.	1,500.00
2/01/09	Natural Resources Defense Council 40 West 20th Street New York, NY 10011	To support environmental advocacy.	3,000.00
2/01/09	Cumberland College 6191 College Station Drive Williamsburg, KY 40769	To provide general support for the college.	2,000.00
2/01/09	Friends of Women's Rights National Historical Park P.O. Box 145 Seneca Falls, NY 13148	To support national park honoring the women's equal rights movement.	3,000.00
2/01/09	Horses and the Handicapped P.O. Box 273542 Boca Raton, FL 33427-3542	To support a therapeutic riding program for the handicapped.	2,500.00
2/02/09	New Paths in Music 92 Fort Hill Circle Staten Island, NY 10301	To support performance of music by living composers.	1,000.00

ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

<u>Date</u>	<u>Recipient</u>	<u>Purpose of Grant</u>	<u>Amount</u>
2/09/09	Wildlife Alliance 1600 K Street, Suite 800 Washington, DC 20006	To support wildlife rescue center and rescue operations in Cambodia.	12,000.00
2/17/09	Grand Traverse Area Literacy Council P.O. Box 4119 Traverse City, MI 49685	To support literacy and ESL programs.	10,000.00
2/17/09	Wanekia Wanagi Shelter, Inc. P.O. Box 178 Kiel, WI 53042	To support animal rescue center.	2,000.00
2/17/09	Project Literacy of Bergen County 355 Main Street Hackensack, NJ 07601	To support programs to improve adult literacy in Bergen County, NJ.	5,000.00
2/17/09	Exchange Club Family Center 2180 Union Avenue Memphis, TN 38104	To support programs to prevent child neglect and abuse.	5,000.00
2/20/09	The Smile Train 245 5th Avenue New York, NY 10016	To provide free cleft palate surgery for children.	2,000.00
2/20/09	Baden Street Settlement 585 Joseph Avenue Rochester, NY 14620	To support the CONECTS Program of the Metro Council for Teen Potential	10,000.00
2/20/09	Bach Children's Chorus 97 Azalea Road Rochester, NY 14620	To support music education.	500.00
2/20/09	Cats in Need of Human Care 6353 Greyson Way Riverside, CA 92506	To support animal rescue center.	3,000.00
<u>Date</u>	<u>Recipient</u>	<u>Purpose of Grant</u>	<u>Amount</u>

ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

3/04/09	The Magic Jungle P.O. Box 219 Apple Valley, CA 93207	To support wildlife preservation activities.	5,000.00
3/05/09	Freedom from Religion Foundation P.O. Box 750 Madison, WI 53701	General support of the organization.	5,000.00
3/16/09	American Littoral Society 28 West 9th Road Broad Channel, NY 11693	To support environmental education and preservation of Jamaica Bay, and the 2009 NY State beach cleanup.	15,000.00
3/25/09	SeedTree 227 Cape Jellison Road Stockton Springs, ME 04981	To support environmental restoration and education.	5,000.00
3/25/09	Fauna and Flora International P. O. Box 42575 Washington, DC 20015	To support environmental and animal preservation projects.	10,000.00
4/06/09	Seeking Common Ground P. O. Box 599 Canandaigua, NY 14424	To support the Herb Haven project for women and children.	7,000.00
4/08/09	Somali Foundation 1101 Euclid Avenue Kansas City, MO 64127	To support ESL training for Somali immigrants in the Kansas City area.	5,000.00
4/08/09	Beacon Academy 477 Longwood Avenue Boston, MA 02215	To support programs for urban, low-income children.	5,000.00
4/08/09	Peconic Baykeeper 10 Old Country Road Quogue, NY 11959	To support environmental advocacy and education.	6,000.00
Date	Recipient	Purpose of Grant	Amount

ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

4/08/09	Sustainable South Bronx 890 Garrison Avenue The Bronx, NY 10474	To support environmental and economic improvement in the South Bronx.	5,000.00
4/08/09	SER de New Mexico 1931 San Mateo NE Albuquerque, NM 87110	To support adult literacy services in the Albuquerque area.	3,000.00
4/14/09	Long Island Children's Museum 11 Davis Avenue garden City, NJ 11530	To support the museum's Juntos al Kinder program.	1,000.00
4/16/09	New York Presbyterian Hospital Center for Community Health and Education 60 Haven Avenue, Suite B-3 New York, NY 10032	To support the Family Life and Sexuality education course for parents of students at George Washington High School.	8,500.00
4/20/09	Thomas Merton Center 5125 Penn Avenue Pittsburgh, PA 15224	To support the Book'Em project.	3,000.00
4/20/09	Reproductive Health Access Project P.O. Box 21191 New York, NY 10025	To support the Contraception Access Initiative.	5,000.00
4/24/09	The Sunshine Center 101 St. Clair Street Frankfort, KY	To support parenting programs.	3,000.00
5/04/09	Planned Parenthood Arizona 5651 North 7th Street Phoenix, AZ 85014	To support the training of health-care professionals to provide abortion services.	10,000.00

ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

<u>Date</u>	<u>Recipient</u>	<u>Purpose of Grant</u>	<u>Amount</u>
5/27/09	Friends of Rye Nature Center 873 Boston Post Road Rye, NY 10580	To support urban forest preservation and maintenance.	3,000.00
7/03/09	First Star 1666 K Street NW, Suite 300 Washington, DC 20006	To support the Campaign for a Child's Right to Counsel.	5,000.00
7/07/09	Alabama World Affairs Council 3707 Everest Drive Montgomery, AL 36106	To support the appearance of Dr. William Moomaw at an AMAW meeting on the subject of climate change.	1,000.00
7/07/09	Fessenden House 236 Warburton Avenue Yonkers, NY 10701-2226	To support home for men with substance abuse and mental health problems.	1,000.00
8/10/09	Jupiter Symphony 155 West 68th Street New York, NY 10023	To support chamber music performance.	5,000.00
10/12/09	Asian Elephant Art and Conservation Project 453 Broome Street, #4D New York, NY 10013	To support elephant conservation efforts in Asia.	544.37

ANDERSON-ROGERS FOUNDATION GRANTS
1/01/09-12/31/09

<u>Date</u>	<u>Recipient</u>	<u>Purpose of Grant</u>	<u>Amount</u>
12/14/09	Bargemusic Fulton Ferry Landing Brooklyn, NY 11201	To support classical music performance.	3,000.00
12/14/09	Austin Lyric Opera 901 Barton Springs Road Austin, TX 78704	To support the Opera's music enrichment program for children and caregivers of SafePlace.	1,000.00
12/14/09	Winsor Music 312 Waltham Street Lexington, MA 02421	In support of the Music Outreach Program.	2,000.00
Total:			250,544.37