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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 <b>CLERMONT FOUNDATION</b>		A Employer identification number <b>22-3177379</b>
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number <b>908-273-5085</b>
	City or town, state, and ZIP code <b>C/O GLORIA CHOONG, PO BOX 429</b> <b>SUMMIT, NJ 07902-0429</b>		C If exemption application is pending, check here <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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 4,096,574.</b> (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	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))		(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			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	145,386.	145,386.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<18,791.>			
	b Gross sales price for all assets on line 6a	1,471,357.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	<131.>	<131.>		STATEMENT 2	
12 Total. Add lines 1 through 11	126,464.	145,255.			
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				
	b Accounting fees	STMT 3	5,717.	2,859.	2,858.
	c Other professional fees				
	17 Interest		130.	130.	0.
	18 Taxes	STMT 4	3,342.	3,287.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	STMT 5	544.	384.	69.
	24 Total operating and administrative expenses. Add lines 13 through 23		9,733.	6,660.	2,927.
	25 Contributions, gifts, grants paid		138,250.		138,250.
26 Total expenses and disbursements. Add lines 24 and 25		147,983.	6,660.	141,177.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<21,519.>				
b Net investment income (if negative, enter -0-)		138,595.			
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
<b>Assets</b>	1 Cash - non-interest-bearing	7,057.	7,056.	7,056.
	2 Savings and temporary cash investments	495,875.	406,129.	406,129.
	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 <b>STMT 6</b>	2,218,189.	2,273,240.	3,266,377.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
<b>Liabilities</b>	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation ▶			
	15 Other assets (describe ▶ <b>STATEMENT 7</b> )	263,707.	276,884.	417,012.
	16 <b>Total assets</b> (to be completed by all filers)	2,984,828.	2,963,309.	4,096,574.
	17 Accounts payable and accrued expenses	600.	600.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ )			
	23 <b>Total liabilities</b> (add lines 17 through 22)	600.	600.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	2,285,339.	2,285,339.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	698,889.	677,370.	
	30 <b>Total net assets or fund balances</b>	2,984,228.	2,962,709.	
	31 <b>Total liabilities and net assets/fund balances</b>	2,984,828.	2,963,309.	

**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	2,984,228.
2 Enter amount from Part I, line 27a	2	<21,519.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,962,709.
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	2,962,709.

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>			
<b>b</b> SEE ATTACHED STATEMENT			
<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>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 1,471,357.		1,499,533.	<18,791.>

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))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			<18,791.>

  

<b>2</b> Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div> <div style="margin-left: 10px;"> <b>2</b> </div> </div>	<18,791.>
<b>3</b> 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	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           If gain, also enter in Part I, line 8, column (c).            If (loss), enter -0- in Part I, line 8         </div> <div style="margin-left: 10px;"> <b>3</b> </div> </div>	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	168,566.	3,880,698.	.043437
2007	273,190.	4,239,729.	.064436
2006	188,782.	3,474,445.	.054334
2005	97,613.	2,838,989.	.034383
2004	154,045.	2,564,853.	.060060

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	.256650
<b>3</b> 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>3</b>	.051330
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	3,502,497.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	179,783.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	1,386.
<b>7</b> Add lines 5 and 6	<b>7</b>	181,169.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	141,177.

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.

**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 type="checkbox"/> and enter 1% of Part I, line 27b		1	2,772.
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	2,772.
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	2,772.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	17,513.	
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	17,513.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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	14,741.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 14,741. Refunded <input type="checkbox"/>	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
1c 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?	X	
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) <u>NJ</u>		
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		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?	13	X	

Website address ► N/A

14 The books are in care of ► MARTHA KEITH, TRUSTEE Telephone no. ► 9082735085  
 Located at ► C/O GLORIA CHOONG, P.O. BOX 429, SUMMIT, NJ ZIP+4 ► 07902-0429

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 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 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"/> N/A	1b	
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No ► _____		
3a 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 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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

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?

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?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

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
MARTHA H. KEITH	TRUSTEE			
C/O GLORIA CHOONG, P.O. BOX 429				
SUMMIT, NJ 079020429	1.00	0.	0.	0.
GARNETT L. KEITH	TRUSTEE			
C/O GLORIA CHOONG, P.O. BOX 429				
SUMMIT, NJ 079020429	1.00	0.	0.	0.
GLORIA CHOONG	SECRETARY			
C/O GLORIA CHOONG, P.O. BOX 429				
SUMMIT, NJ 079020429	5.00	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				

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

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	3,122,892.
b	Average of monthly cash balances	1b	432,943.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	3,555,835.
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	3,555,835.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	53,338.
5	<b>Net value of noncharitable-use assets</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,502,497.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	175,125.

**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	175,125.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,772.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,772.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	172,353.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	172,353.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	172,353.

**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	141,177.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	141,177.
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	0.
6	<b>Adjusted qualifying distributions</b> Subtract line 5 from line 4	6	141,177.

**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
<b>1</b> Distributable amount for 2009 from Part XI, line 7				172,353.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004	7,641.			
<b>b</b> From 2005				
<b>c</b> From 2006	23,548.			
<b>d</b> From 2007	71,472.			
<b>e</b> From 2008				
<b>f</b> Total of lines 3a through e	102,661.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ► \$	141,177.			
<b>a</b> Applied to 2008, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				141,177.
<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))	31,176.			31,176.
<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	71,485.			
<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		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	71,485.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005				
<b>b</b> Excess from 2006	13.			
<b>c</b> Excess from 2007	71,472.			
<b>d</b> Excess from 2008				
<b>e</b> Excess from 2009				



**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 Paid during the year</b>				
<b>SEE STATEMENT 8</b>				
<b>Total</b>			<b>▶ 3a</b>	<b>138,250.</b>
<b>b Approved for future payment</b>				
<b>NONE</b>				
<b>Total</b>			<b>▶ 3b</b>	<b>0.</b>



**Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

- |          |  | Yes | No |
|----------|--|-----|----|
| <b>1</b> | 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?  |     |    |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |     |    |
|          | (1) Cash   |     | X  |
|          | (2) Other assets   |     | X  |
| <b>b</b> | Other transactions:  |     |    |
|          | (1) Sales of assets to a noncharitable exempt organization   |     | X  |
|          | (2) Purchases of assets from a noncharitable exempt organization   |     | X  |
|          | (3) Rental of facilities, equipment, or other assets   |     | X  |
|          | (4) Reimbursement arrangements   |     | X  |
|          | (5) Loans or loan guarantees   |     | X  |
|          | (6) Performance of services or membership or fundraising solicitations   |     | X  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   |     | X  |
| <b>d</b> | 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 <u>James Kitz</u>		Date <u>11/15/10</u>		Title <u>TRUSTEE</u>	
	Preparer's signature <u>Mark K. Johnson, CPA</u>		Date <u>11-12-10</u>		Check if self-employed <input type="checkbox"/>	
Paid Preparer's Use Only	Firm's name (or yours if self-employed) <u>AMG NATIONAL TRUST BANK</u>				EIN <u>84-1595367</u>	
	address and ZIP code <u>6501 EAST BELLEVIEW AVENUE, STE 400</u> <u>ENGLEWOOD, CO 80111-6020</u>				Phone no. <u>303-694-2190</u>	

Form **990-PF** (2009)

CLERMONT FOUNDATION

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	SCHWAB #3936 (SEE ATTACHED)	P	VARIOUS	VARIOUS
b	SCHWAB #3936 (SEE ATTACHED)	P	VARIOUS	VARIOUS
c	SCHWAB #0296 (SEE ATTACHED)	P	VARIOUS	VARIOUS
d	SCHWAB #0296 (SEE ATTACHED)	P	VARIOUS	VARIOUS
e	SCHWAB #4262 (SEE ATTACHED)	P	VARIOUS	VARIOUS
f	SCHWAB #4262 (SEE ATTACHED)	P	VARIOUS	VARIOUS
g	SEABRIDGE ASIA REDUX LLC	P	VARIOUS	VARIOUS
h	CLASS ACTION SUIT SETTLEMENT PROCEEDS	P	VARIOUS	VARIOUS
i	CAPITAL GAINS DIVIDENDS			
j				
k				
l				
m				
n				
o				

(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 825,872.		830,692.	<4,820.>
b 556,825.		590,917.	<34,092.>
c 35,856.		33,030.	2,826.
d 10,037.		4,909.	5,128.
e 36,392.		33,573.	2,819.
f 5,706.		6,412.	<706.>
g			9,385.
h 558.			558.
i 111.			111.
j			
k			
l			
m			
n			
o			

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<4,820.>
b			<34,092.>
c			2,826.
d			5,128.
e			2,819.
f			<706.>
g			9,385.
h			558.
i			111.
j			
k			
l			
m			
n			
o			

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	<18,791.>
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

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ENERGY TRANSFER EQUITY	7.	0.	7.
ENTERPRISE PRODUCTS	45.	0.	45.
FIDELITY INVESTMENTS	3,471.	0.	3,471.
KINDER MORGAN ENERGY	464.	0.	464.
MAGELLAN MIDSTREAM PARTNERS	25.	0.	25.
PLAINS ALL AMERICAN PIPELINE	40.	0.	40.
SCHWAB #0296	3,418.	0.	3,418.
SCHWAB #0296	55.	55.	0.
SCHWAB #3936	124,931.	0.	124,931.
SCHWAB #4262	3,048.	0.	3,048.
SCHWAB #4262	56.	56.	0.
SEABRIDGE ASIA TECH	9,425.	0.	9,425.
T. ROWE PRICE	512.	0.	512.
TOTAL TO FM 990-PF, PART I, LN 4	145,497.	111.	145,386.

FORM 990-PF	OTHER INCOME	STATEMENT	2
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIP INCOME (LOSS)	<131.>	<131.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	<131.>	<131.>	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTANT FEES	5,717.	2,859.		2,858.	
TO FORM 990-PF, PG 1, LN 16B	5,717.	2,859.		2,858.	



FORM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	3,287.	3,287.		0.	
NJ DIV OF CONSUMER AFFAIRS	55.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	3,342.	3,287.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
NON-DEDUCTIBLE EXPENSES-FROM PASSTHROUGH ENTITIES	91.	0.		0.	
INVESTMENT INTEREST EXPENSE	313.	313.		0.	
MISCELLANEOUS	81.	41.		40.	
POSTAGE	59.	30.		29.	
TO FORM 990-PF, PG 1, LN 23	544.	384.		69.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
FIDELITY INVESTMENTS (SEE ATTACHED)	118,776.	213,705.		
SCHWAB INVESTMENTS #0296 (SEE ATTACHED)	58,605.	66,003.		
SCHWAB INVESTMENTS #3936 (SEE ATTACHED)	2,009,674.	2,883,613.		
SCHWAB INVESTMENTS #4262 (SEE ATTACHED)	62,775.	69,039.		
T. ROWE PRICE INT'L DISCOVERY FUND, 894 SHS	23,410.	34,017.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,273,240.	3,266,377.		

FORM 990-PF	OTHER ASSETS		STATEMENT 7
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SEABRIDGE ASIA TECH, LLC	263,707.	276,884.	417,012.
TO FORM 990-PF, PART II, LINE 15	263,707.	276,884.	417,012.

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT 8
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AGNES SCOTT COLLEGE 141 EAST COLLEGE AVE DECATUR, GA 30030-9802	NONE EDUCATION	EXEMPT	10,000.
AMERICAN RED CROSS, SOUTHEAST MORRIS CHAPTER 1 MADISON AVE MADISON, NJ 07940-1499	NONE HEALTH	EXEMPT	2,000.
AMNESTY INTERNATIONAL USA PO BOX 98233 WASHINGTON, DC 20077-7014	NONE HEALTH	EXEMPT	1,000.
ARCHWAY SCHOOL 250 41ST ST OAKLAND, CA 94611	NONE EDUCATION	EXEMPT	5,000.
ASPEN MUSIC FESTIVAL & SCHOOL 2 MUSIC SCHOOL ROAD ASPEN, CO 81611	NONE ARTS	EXEMPT	1,000.
BARTON COLLEGE, NAN M CHEEK ENDOWMENT FUND COLLEGE STATION PO BOX 5000 WILSON, NC 27893	NONE EDUCATION	EXEMPT	1,000.

## CLERMONT FOUNDATION

22-3177379

BETA PSI FOUNDATIONS, INC 6400 POWERS FERRY RD, STE 400 ATLANTA, GA 30339	NONE EDUCATION	EXEMPT	10,000.
BIG SKY YOUTH EMPOWERMENT PROJECT, INC PO BOX 6757 BOZEMAN, MT 59771	NONE SOCIAL SERVICE	EXEMPT	1,000.
CALIFORNIA STATE FIREFIGHTERS' ASSOCIATION PMB 211, 9175 KIEFER BLVD SACRAMENTO, CA 95826-5105	NONE HEALTH	EXEMPT	500.
CENTRAL ASIA INSTITUTE PO BOX 7209 BOZEMAN, MT 59771-7209	NONE EDUCATION	EXEMPT	5,000.
CIVIL WAR PRESERVATION TRUST 1331 H ST, STE 1001 WASHINGTON , DC 20005	NONE EDUCATION	EXEMPT	1,000.
COLUMBUS REG HOSPITAL FOUNDATION, L. PAUL BERMAN MEMORIAL FUND - 2400 E 17TH ST COLUMBUS, IN 47201	NONE HEALTH	EXEMPT	10,000.
COMMUNITIES FOR PEOPLE, INC 418 COMMONWEALTH AVE BOSTON, MA 02115-2801	NONE SOCIAL SERVICE	EXEMPT	3,000.
DIRECT RELIEF INTERNATIONAL 27 S. LA PATERA LN SANTA BARBARA, CA 93107	NONE HEALTH	EXEMPT	5,000.
DOCTORS WITHOUT BORDERS PO BOX 1869 MERIFIELD, VA 22116-9644	NONE HEALTH	EXEMPT	10,000.
EMMA WILLARD SCHOOL 285 PAULING AVE TROY, NY 12180-9967	NONE EDUCATION	EXEMPT	2,000.

## CLERMONT FOUNDATION

22-3177379

ENVIRONMENTAL DEFENSE, ATTN FRED KRUPP, EX. DIR 257 PARK AVE S NEW YORK , NY 10010	NONE ENVIRONMENT	EXEMPT	2,000.
FIRST PRESBYTERIAN CHURCH OF PORT TOWNSEND 1111 FRANKLIN ST PORT TOWNSEND, WA 98368	NONE RELIGIOUS	EXEMPT	3,000.
FRESNO COUNTY HISTORICAL ASSOCIATION 7160 W KEARNEY BLVD FRESNO, CA 93706	NONE SOCIAL SERVICE	EXEMPT	1,500.
FRIENDS OF THE SOLANA BEACH LIBRARY 157 STEVENS AVE SOLANA BEACH, CA 92075	NONE EDUCATION	EXEMPT	500.
GALLATIN VALLEY LAND TRUST PO BOX 7021 BOZEMAN, MT 59771-7021	NONE ENVIRONMENT	EXEMPT	10,000.
GEORGIA TECH FOUNDATION, ROLL CALL 190 NORTH AVE NW ATLANTA, GA 30332-0220	NONE EDUCATION	EXEMPT	3,000.
GLOBAL HOPE 72 PLAZA WAY MARIETTA, GA 30060	NONE HEALTH	EXEMPT	1,000.
HSB FUND SOLDIERS FIELD RD BOSTON, MA 02163-9904	NONE EDUCATION	EXEMPT	1,000.
KPBS, SAN DIEGO STATE UNIVERSITY 5200 CAMPANILE DR SAN DIEGO, CA 92182-5400	NONE ARTS	EXEMPT	500.
LOOMIS CHAFFEE SCHOOL PO BOX 600 WINDSOR, CT 06095-9956	NONE EDUCATION	EXEMPT	3,500.

MAYO FOUNDATION 200 FIRST ST SW ROCHESTER, MN 55905	NONE HEALTH	EXEMPT	10,000.
MIDDLEBURY COLLEGE, BREAD LOAF SCHOOL OF ENGLISH C/O DEVELOPMENT OFFICE MIDDLEBURY, VT 05753-6201	NONE EDUCATION	EXEMPT	2,000.
MOVING IN SPIRIT, INC PO BOX 17628 ATLANTA, GA 30316	NONE SOCIAL SERVICE	EXEMPT	1,000.
OVERLOOK HOSPITAL FOUNDATION PO BOX 220 SUMMIT, NJ 07902-0220	NONE HEALTH	EXEMPT	1,000.
OXFAM AMERICA - DARFUR FAMINE RELIEF PO BOX 55807 BOSTON, MA 02205-5807	NONE HEALTH	EXEMPT	1,000.
PROJECT RENEWAL 200 VARICK ST NEW YORK, NY 10014	NONE SOCIAL SERVICE	EXEMPT	1,000.
SALVATION ARMY PO BOX 503580 SAN DIEGO, CA 92150-3580	NONE HEALTH	EXEMPT	500.
SAN DIEGO COUNTY FOSTER PARENT ASSN PO BOX 881572 SAN DIEGO, CA 92168-1572	NONE SOCIAL SERVICE	EXEMPT	50.
SAN DIEGO MUSEUM OF ART PO BOX 122107 SAN DIEGO, CA 92112-2107	NONE ARTS	EXEMPT	300.
SAN DIEGO OPERA 18TH FL CIVIC CENTER PLAZA, 1200 THIRD AVE SAN DIEGO, CA 92101-4112	NONE ARTS	EXEMPT	500.

. CLERMONT FOUNDATION

22-3177379

SHALLOWFORD PRESBYTERIAN CHURCH 2375 SHALLOWFORD RD NE ATLANTA, GA, 30345	NONE RELIGIOUS	EXEMPT	2,500.
SNOWMASS WILDCAT FIRE DEPARTMENT BOX 6436 SNOWMASS VILLAGE, CO 81615	NONE HEALTH	EXEMPT	200.
ST. MATTHEWS PARISH CHURCH (HENRIETTA & CLINTON KINGSLEY MEMORIAL) - PO BOX 37 PACIFIC PALISADES, CA 90272	NONE RELIGIOUS	EXEMPT	
ST. VINCENT - ST. MARY'S HIGH SCHOOL 15 N MAPLE ST AKRON, OH 44304-0443	NONE EDUCATION	EXEMPT	1,000.
SUMMIT VOLUNTEER FIRST AID SQUAD PO BOX 234 SUMMIT, NJ 07902-0234	NONE HEALTH	EXEMPT	200.
THE MEDICAL FOUNDATION, UNC SCHOOL OF MEDICINE 800 AIRPORT RD CHAPEL HILL, NC 27514	NONE HEALTH	EXEMPT	5,000.
THE SCHOOL FOR CHILDREN WITH HIDDEN INTELLIGENCE 812 EAST COUNTY LINE RD LAKEWOOD, NJ 08701	NONE EDUCATION	EXEMPT	3,500.
THE TRAIL FOUNDATION PO BOX 5195 AUSTIN , TX 78763	NONE ENVIRONMENT	EXEMPT	3,000.
TUFTS UNIVERSITY PACKARD HALL MEDFORD, MA 02155-7056	NONE EDUCATION	EXEMPT	3,500.
UNIVERSITY OF IDAHO FOUNDATION, CHEMICAL ENGINEERING PO BOX 441011 MOSCOW, ID 83844-1011	NONE EDUCATION	EXEMPT	3,500.

. CLERMONT FOUNDATION

22-3177379

UPAYA ZEN CENTER  
1404 CERRO GORDO RD SANTA FE,  
NM 87501

NONE  
SOCIAL SERVICE

EXEMPT

5,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

138,250.

Clermont Foundation  
2009 Realized Gains and Losses

Schwab # 3936

Bought	Sold	Shares	Security	Cost Basis	Proceeds	Gain/Loss
09/09/08	01/21/09	600	Covidien Limited	32,316 00	21,804 94	(10,511 06)
09/24/08	01/21/09	250	Covidien Limited	13,460 53	9,085 39	(4,375 14)
07/18/08	01/22/09	750	CVS Corp	28,165 75	20,179 06	(7,986 69)
04/29/08	01/30/09	350	Telefonica SA SP ADR	30,232 36	18,787 94	(11,444 42)
11/18/08	02/25/09	1300	iShares S&P U S Preferred Stock Index Fd	34,974 66	24,887 47	(10,087 19)
01/06/09	03/25/09	3500	Advantage Energy Income Fund	17,957 65	7,954 20	(10,003 45)
10/27/08	04/21/09	4000	Calamos Strategic Total Return Fund	25,320 00	24,783 00	(537 00)
10/28/08	04/21/09	1000	Calamos Strategic Total Return Fund	6,311 60	6,195 75	(115 85)
10/15/08	04/22/09	2000	Nuveen Multi-Strategy Income & Growth Fd 2	9,743 05	8,323 31	(1,419 74)
10/16/08	04/22/09	2000	Nuveen Multi-Strategy Income & Growth Fd 2	9,743 05	8,323 31	(1,419 74)
10/28/08	04/27/09	5000	Flaherty & Crumrine/Claymore Pref Sec Inc	37 061 95	36,666 60	(395 35)
10/30/08	05/06/09	8000	Nuveen Multi-Strategy Income & Growth Fund	37 804 95	36,514 11	(1,290 84)
01/23/09	05/08/09	3000	Eaton Vance Enhanced Equity Income Fund	32 601 55	33,120 09	518 54
03/27/09	05/15/09	15000	HongKong Land Holdings Limited	34,586 91	40,123 14	5,536 23
06/03/08	05/20/09	1500	Kroger Co	40,916 05	33,005 80	(7,910 25)
12/29/08	06/17/09	5219 44	T Rowe Price GNMA Fund	50,000 00	50,161 07	161 07
06/03/09	06/22/09	51000	Capitacommercial Trust Rights Exp 6/24/09	10,179 06	8,716 24	(1,462 82)
09/23/08	06/26/09	7	Berkshire Hathaway Inc Cl B	29,917 15	19,672 84	(10,244 31)
05/21/09	07/29/09	51000	Capitacommercial Trust	27 096 36	30,705 79	3,609 43
06/24/09	07/29/09	1300	Western Asset Emerging Mkts Floating Rate	12 259 89	12,697 31	437 42
01/06/09	08/05/09	1100	Bonavista Energy Trust	17,269 82	17,652 96	383.14
07/29/09	09/01/09	16000	Bank of Communications Co-H	19,799 40	19,019 80	(779 60)
01/30/09	09/22/09	500	SPDR Gold Trust	45,439 30	49,798 70	4,359 40
02/17/09	09/22/09	120	SPDR Gold Trust	11,461 31	11,951 69	490 38
11/26/08	09/25/09	700	Hatteras Financial Corporation REIT	17,703 00	22,665 63	4,962 63
11/26/08	09/29/09	1600	Ventas Inc	34,831 19	62,975 03	28,143 84
10/15/08	10/06/09	2000	Nuveen Floating Rate Income Opportunity Fd	12,392 95	19,114 15	6,721 20
02/20/09	10/13/09	1500	Eaton Vance Floating-Rate Income Trust	12 326 95	19,030 97	6,704 02
07/30/09	10/13/09	2000	Eaton Vance Floating-Rate Income Trust	23,272 75	25,374 63	2,101 88
06/10/09	10/27/09	1800	Nuveen Global Value Opportunities Fund	25,611 79	29,487 07	3,875 28
04/07/09	10/30/09	1000	Redwood Trust Inc	16,061 65	14,066 48	(1,995 17)
01/07/09	12/10/09	2300	NAL Oil & Gas Trust	16,544 11	26,581 12	10,037 01
10/09/09	12/16/09	600	CurrencyShares Canadian Dollar Trust ETF	57,329 77	56,446 65	(883 12)
<b>Total Short Term</b>				<b>830,692.51</b>	<b>825,872.24</b>	<b>(4,820.27)</b>
06/16/05	01/13/09	1200	Williams Companies, Inc	22,919 87	18,158 34	(4,761 53)
04/01/08	05/20/09	1000	Pall Corp	34,664 05	25,794 68	(8,869 37)
04/02/08	05/21/09	3000	Schering-Plough Corp	43,448 95	70,899 92	27,450 97
10/04/06	06/18/09	1500	RPM International, Inc	28,265.81	21,913 73	(6,352 08)
12/20/07	06/18/09	1000	Raytheon Company	60,735 45	45,942 46	(14,792 99)
09/23/05	06/18/09	232	Stryker Corp	11,628 36	9,317 72	(2,310 64)
10/24/07	06/19/09	1000	Pentair Inc	34,893 65	26,097 17	(8,796 48)
04/28/00	06/24/09	155	Johnson Controls Inc	1 656 95	3,174 05	1,517 10
05/25/00	06/24/09	155	Johnson Controls Inc	1 656 95	3,174 05	1,517 10
01/17/01	06/24/09	232	Johnson Controls Inc	2,479 43	4,750 84	2,271 41



Clermont Foundation  
2009 Realized Gains and Losses

04/25/07	06/24/09	2000 Western Union Co	42,501 35	32,070 42	(10,430 93)
05/20/08	06/30/09	1250 Nestle SA Spons ADR For Reg	61,536 10	46,964 47	(14,571 63)
03/11/08	07/01/09	1000 Plum Creek Timber Co REIT	39,111 25	30,349 06	(8,762 19)
01/24/07	07/01/09	285 Transocean Ltd	33,976 88	21,132 85	(12,844 03)
07/26/07	09/01/09	600 Bucyrus International, Inc	19,192 46	18,414 35	(778 11)
11/19/07	09/01/09	400 Compass Minerals International, Inc	14,236 18	21,251 30	7,015 12
08/04/08	09/24/09	900 Annaly Capital Management Inc	13,662 00	17,123 63	3,461 63
07/23/08	10/28/09	15000 China Green (Holdings) Limited	15,640 00	13,059 50	(2,580 50)
07/14/03	10/28/09	12000 Ascendas Real Estate Investment Trust	6,600 81	15,167 70	8,566 89
09/12/06	11/11/09	954 GDF Suez	38,797 81	42,358 31	3,560 50
09/12/06	11/24/09	250 Suez Environnement SA	4,312 79	5,612 06	1,299 27
10/01/08	12/07/09	6069 96 TCW Total Return Bond Fund - N	59,000 00	64,098 77	5,098 77
		<b>Total Long Term</b>	<b>590,917.10</b>	<b>556,825.38</b>	<b>(34,091.72)</b>
			<b>1,421,609.61</b>	<b>1,382,697.62</b>	<b>(38,911.99)</b>

Clermont Foundation  
2009 Realized Gains and Losses

**Schwab # 0296**

<b>Bought</b>	<b>Sold</b>	<b>Shares</b>	<b>Security</b>	<b>Cost Basis</b>	<b>Proceeds</b>	<b>Gain/Loss</b>
01/23/09	05/07/09	400	Eaton Vance Enhanced Equity Income Fd	4,354 63	4,424 93	70 30
10/30/08	05/07/09	1000	Nuveen Multi-Strategy Income & Growth I	4,733 45	4,639 63	(93.82)
12/29/08	06/17/09	728.318	T Rowe Price GNMA Fund	7,000 00	6,976 42	(23 58)
01/30/09	09/22/09	40	SPDR Gold Trust	3,643 38	3,975 52	332 14
05/08/09	10/06/09	600	Nuveen Floating Rate Income Fund	4,172 47	5,632 64	1,460 17
06/23/09	10/06/09	832 285	Northeast Investors Trust	4,000 00	4,722 85	722 85
08/18/09	10/06/09	14 214	Northeast Investors Trust	74 91	80 66	5.75
03/18/09	10/13/09	800	MFS Intermediate Income Trust	5,051 03	5,403 55	352 52
			<b>Total Short Term</b>	<b>33,029.87</b>	<b>35,856.20</b>	<b>2,826.33</b>
05/28/03	09/29/09	200	Ventas Inc	2,908 97	7,864 04	4,955 07
10/01/08	12/07/09	205 761	TCW Total Return Bond Fund - N	2,000 00	2,172 84	172 84
			<b>Total Long Term</b>	<b>4,908.97</b>	<b>10,036.88</b>	<b>5,127.91</b>
				<b>37,938.84</b>	<b>45,893.08</b>	<b>7,954.24</b>

Clermont Foundation  
2009 Realized Gains and Losses

**Schwab # 4262**

<b>Bought</b>	<b>Sold</b>	<b>Shares</b>	<b>Security</b>	<b>Cost Basis</b>	<b>Proceeds</b>	<b>Gain/Loss</b>
10/30/08	05/07/09	1000	Nuveen Multi-Strategy Income & Growth I	4,733.45	4,639.63	(93.82)
01/23/09	05/08/09	450	Eaton Vance Enhanced Equity Income Fd	4,897.84	4,960.41	62.57
12/29/08	06/17/09	728.318	T Rowe Price GNMA Fund	7,000.00	6,976.42	(23.58)
01/30/09	09/22/09	40	SPDR Gold Trust	3,643.38	3,975.52	332.14
05/08/09	10/06/09	600	Nuveen Floating Rate Income Fund	4,172.47	5,632.64	1,460.17
06/23/09	10/06/09	832.285	Northeast Investors Trust	4,000.00	4,722.85	722.85
08/18/09	10/06/09	14.214	Northeast Investors Trust	74.91	80.66	5.75
03/18/09	10/13/09	800	MFS Intermediate Income Trust	5,051.03	5,403.55	352.52
			<b>Total Short Term</b>	<b>33,573.08</b>	<b>36,391.68</b>	<b>2,818.60</b>
03/28/07	06/22/09	70	Procter & Gamble Company	4,411.76	3,532.95	(878.81)
10/01/08	12/07/09	205.761	TCW Total Return Bond Fund - N	2,000.00	2,172.84	172.84
			<b>Total Long Term</b>	<b>6,411.76</b>	<b>5,705.79</b>	<b>(705.97)</b>
				<b>39,984.84</b>	<b>42,097.47</b>	<b>2,112.63</b>

Clermont Foundation  
2009  
Unrealized Gains and Losses

Schwab #0296 - PORTFOLIO APPRAISAL @ 12/31/2008  
Clermont Foundation - U/A DTD 6/11/92 EIN# 22-3177379

Date	Quantity	Security	Total Cost	Price	Market Value	Unrealized Gain/Loss
<b>COMMON STOCK</b>						
10/03/06	350	Annaly Capital Management Inc	4,689.45	17.35	6,072.50	1,383.05
12/28/09	1,000	Chimera Investment Corp	4,180.15	3.88	3,880.00	(300.15)
05/24/00	100	Costco Wholesale Corp	2,739.81	59.17	5,917.00	3,177.19
11/13/09	150	Hatteras Financial Corporation REIT	4,373.95	27.96	4,194.00	(179.95)
08/20/04	100	Henry Schein Inc	3,128.08	52.60	5,260.00	2,131.92
11/13/09	700	MFA Mortgage Investments Inc	5,167.95	7.35	5,145.00	(22.95)
			24,279		30,469	6,189
<b>MUTUAL FUNDS</b>						
08/12/09	800	Aberdeen Asia Pac Income Fund	4,780.47	6.22	4,973.20	192.73
11/13/09	400	Blackrock Credit Allocation Income Trust IV	4,432.15	11.38	4,552.00	119.85
11/13/09	500	Calamos Strategic Total Return Fund	4,283.45	8.76	4,379.60	96.15
04/28/08	240	Loomis Sayles Bond Fund - RET C/R	3,000.00	13.29	3,191.67	191.67
06/04/09	787	MainStay High Yield Corporate Bond Fund	4,000.00	5.65	4,446.79	446.79
04/28/08	80	Managers Bond Fund	2,000.00	24.30	1,941.67	(58.33)
06/17/09	1,240	T Rowe Price High Yield Fund	7,000.00	6.42	7,962.17	962.17
09/27/07	150	Templeton Dragon Fd Com	4,830.04	27.25	4,087.52	(742.52)
			34,326		35,535	1,209
<b>PORTFOLIO TOTAL</b>			<b>58,605</b>		<b>66,003</b>	<b>7,399</b>

Clermont Foundation  
2009  
Unrealized Gains and Losses

Schwab #3936 - PORTFOLIO APPRAISAL @ 12/31/2008  
Clermont Foundation - U/A DTD 6/11/92 EIN# 22-3177379

Date	Quantity	Security	Total Cost	Price	Market Value	Unrealized Gain/Loss
<b>LIMITED PARTNERSHIPS</b>						
01/24/07	300	Energy Transfer Equity, LP	6,974.50	30.58	9,174.00	2,199.50
12/14/07	1,436	Enterprise Products Partners LP	37,295.00	31.41	45,104.76	7,809.76
01/10/08	276	Kinder Morgan Energy Partners LP	3,560.80	60.98	16,830.48	13,269.68
12/14/07	2,750	Magellan Midstream Partners LP	67,044.00	43.33	119,157.50	52,113.50
12/14/07	2,700	Plains All Amer Pipeline LP	70,822.25	52.85	142,695.00	71,872.75
			185,697		332,962	147,265
<b>COMMON STOCK</b>						
09/25/08	400	Air Products & Chemicals Inc	28,414.99	81.06	32,424.00	4,009.01
08/03/09	600	AM Bev Companhia De Bebidas-ADR	44,586.13	101.09	60,654.00	16,067.87
10/16/09	600	American Movil-ADR Series L	28,876.21	46.98	28,188.00	(688.21)
09/28/09	40,000	Anhui Expressway Company	24,057.00	0.70	27,856.00	3,799.00
08/04/08	6,100	Annaly Capital Management Inc	92,568.45	17.35	105,835.00	13,266.55
06/16/00	1,139	Ball Corp	21,557.98	51.70	58,886.30	37,328.32
01/07/09	3,000	Baytex Energy Trust Units	41,473.15	28.30	84,900.00	43,426.85
09/01/09	93,000	CP ALL PCL-Foreign	47,371.30	0.74	69,182.70	21,811.40
01/18/08	1,200	Cisco Systems Inc	29,411.39	23.94	28,728.00	(683.39)
12/23/09	450	Companhia brasileira de Distribuicao ADR	32,790.51	75.12	33,804.00	1,013.49
05/24/00	571	Costco Wholesale Corp	20,345.27	59.17	33,786.07	13,440.80
08/05/09	900	Crescent Point Energy Corp	29,286.67	37.59	33,831.00	4,544.33
07/29/09	2,000	DBS Group Holdings LTD	18,790.56	10.97	21,940.00	3,149.44
11/11/09	3,000	DBS Group Holdings LTD	30,500.29	10.97	32,905.50	2,405.21
06/10/05	560	Exxon Mobil Corp	32,805.97	68.19	38,186.40	5,380.43
08/06/09	125	Fairfax Financial Holdings Ltd	38,753.38	389.96	48,745.00	9,991.62
11/11/09	45	Fairfax Financial Holdings Ltd	16,585.00	389.96	17,548.20	963.20
08/13/09	600	Fomento Economico Mexicano SAB	22,642.75	47.88	28,728.00	6,085.25
11/11/09	15,000	Glow Energy PCL	14,648.71	0.99	14,847.00	198.29
12/08/08	135	Google Inc Cl A	40,346.09	619.98	83,697.30	43,351.21
11/26/08	2,100	Hatteras Financial Corporation REIT	53,087.43	27.96	58,716.00	5,628.57
08/20/04	1,100	Schein Henry Inc	35,509.24	52.60	57,860.00	22,350.76
08/24/09	250	Intl Bus Machines	29,967.95	130.90	32,725.00	2,757.05
08/31/09	2,000	Itau Unibanco Holdings SA	33,926.35	22.84	45,680.00	11,753.65
07/21/09	1,700	Market vectors Brazil Small Cap ETF	52,562.07	49.41	83,997.00	31,434.93
03/05/08	400	Mettler-Toledo Intl Inc	38,404.19	104.99	41,996.00	3,591.81
12/04/08	8,000	MFA Mortgage Investments, Inc	47,207.35	7.35	58,800.00	11,592.65
06/19/09	1,600	Microsoft Corp	38,669.43	30.48	48,768.00	10,098.57
05/21/09	22,000	Noble Group LTD	25,385.26	2.31	50,927.80	25,542.54
07/01/08	42	Nortel Networks Corp	337.26	0.02	0.97	(336.29)

Clermont Foundation  
2009  
Unrealized Gains and Losses

Schwab #3936 - PORTFOLIO APPRAISAL @ 12/31/2008  
Clermont Foundation - U/A DTD 6/11/92 EIN# 22-3177379

Date	Quantity	Security	Total Cost	Price	Market Value	Unrealized Gain/Loss
06/19/09	1,900	Oracle Corp	39,115 13	24 53	46,607 00	7,491 87
06/16/00	522	Paccar Inc	4,865 67	36 27	18,932 94	14,067 27
06/19/09	80,000	Perusahaan Gas Negara PT	22,776 98	0 41	33,072 00	10,295 02
09/28/09	36,000	Sichuan Expressway Company Ltd	14,846 00	0 53	19,080 00	4,234 00
01/22/01	387	Symantec Corp	2,605 49	17 89	6,923 43	4,317 94
05/06/05	140	Syngenta AG	14,806 00	281 22	39,370 49	24,564 49
04/01/05	1,932	Thermo Fisher Scientific	52,157 53	47 69	92,137 08	39,979 55
06/24/02	1,600	Walmart de Mexico SA ADR V	22,229 95	44 96	71,939 36	49,709 41
07/24/08	70,000	Want Want China Holdings Limited	27,556 00	0 70	49,112 00	21,556 00
09/28/09	30000	Zhejiang Expressway Company Ltd	26,956 00	0 93	27,819 00	863 00
			1,238,783		1,769,137	530,353
<b>MUTUAL FUNDS</b>						
06/18/09	2,000	Advent Claymore Convertible Sec & Inc Fund	23,934 35	15 59	31,180 00	7,245 65
04/28/09	2,000	Calamos convertible and High Income Fund	18,242 75	11 54	23,085 00	4,842 25
11/06/09	3,000	Calamos Global Dynamic Income Fund	22,557 25	7 86	23,580 00	1,022 75
10/29/08	4,600	Eaton Vance Limited Duration Income Fund	45,477 38	14 90	68,540 00	23,062 62
02/04/09	1,500	Eaton Vance Senior Income Trust	6,079 75	6 26	9,390 00	3,310 25
08/06/09	1,000	Eaton Vance Senior Income Trust	5,111 45	6 26	6,260 00	1,148 55
12/01/08	6,900	Kayne Anderson Energy Total Return Fund	71,699 95	23 10	159,390 00	87,690 05
11/12/08	7,283	Loomis Sayles Bond Fund - RET CI R	73,000 00	13 29	96,790 13	23,790 13
06/04/09	19,875	MainStay High Yield Corporate Bond Fund	101,000 00	5 65	112,293 00	11,293 00
01/30/09	700	Market Vectors High Yield Corporate Bond Fund	23,978 42	46 21	32,347 00	8,368 58
09/22/09	600	Market Vectors Gold Miners ETF	27,757 63	46 21	27,726 00	(31 63)
06/10/09	4,000	Nuveen Multi Strategy Income and Growth Fund	23,237 35	7 69	30,760 00	7,522 65
07/06/09	2,000	Nuveen Multi Strategy Income and Growth Fund	11,404 95	7 69	15,383 00	3,978 05
07/30/09	2,000	Nuveen Multi-Currency ST Gov Income Fund	31,212 15	15 41	30,820 00	(392 15)
06/22/09	4,200	Power shares Preferred Portfolio	50,500 93	13 55	56,910 00	6,409 07
06/17/09	8,888	T Rowe Price High Yield Fund	50,000 00	6 42	57,060 38	7,060 38
			585,194		781,515	196,320
<b>PORTFOLIO TOTAL</b>			<b>2,009,674</b>		<b>2,883,613</b>	<b>873,939</b>

Clermont Foundation  
2009  
Unrealized Gains and Losses

Schwab #4262 - PORTFOLIO APPRAISAL @ 12/31/2008  
Clermont Foundation - U/A DTD 6/11/92 EIN# 22-3177379

Date	Quantity	Security	Total Cost	Price	Market Value	Unrealized Gain/Loss
<b>COMMON STOCK</b>						
09/05/07	300	Annaly Capital Management Inc	4,321 67	17 35	5,205 00	883 33
12/28/09	1,000	Chimera Investment Corporation	4,180 15	3 88	3,880 00	(300 15)
11/13/09	150	Hatteras Financial Corporation REIT	4,373 95	27 96	4,194 00	(179 95)
08/20/04	200	Henry Schein Inc	6,256 17	52 60	10,520 00	4,263 83
11/13/09	700	MFA Mortgage Investments, Inc	5,167 95	7 35	5,145 00	(22 95)
06/24/09	75	Pepsico Inc	4,013 20	60 80	4,560 00	546 80
			28,313		33,504	4,644
<b>MUTUAL FUNDS</b>						
08/12/09	800	Aberdeen Asia Pac Income Fund	4,780 47	6 22	4,973 20	192 73
11/13/09	400	Blackrock Credit Allocation Income Tr IV	4,432 15	11 38	4,552 00	119 85
11/13/09	500	Calamos Strategic Total Return Fund	4,283 45	8 57	4,379 60	96 15
04/28/08	240	Loomis Sayles Bond Fund - RET Cl R	3,000 00	13 29	3,191 67	191 67
06/04/09	787	MainStay High Yield Corporate Bond Fund	4,000 00	25 03	4,446 79	446 79
04/28/08	80	Managers Bond Fund	2,000 00	24 30	1,941 67	(58 33)
06/17/09	1,240	T Rowe Price High Yield Fund	7,000 00	5 64	7,962 17	962 17
10/09/07	150	Templeton Dragon Fd Com	4,965 95	27 25	4,087 52	(878 43)
			34,462		35,535	1,073
<b>PORTFOLIO TOTAL</b>			<b>62,775</b>		<b>69,039</b>	<b>5,717</b>

# Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

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

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

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

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

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

Type or print	Name of Exempt Organization <b>CLERMONT FOUNDATION</b>	Employer identification number <b>22-3177379</b>
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. <b>C/O GLORIA CHOONG, PO BOX 429</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>SUMMIT, NJ 07902-0429</b>	

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

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

### MARTHA KEITH, TRUSTEE

- The books are in the care of ► **C/O GLORIA CHOONG, P.O. BOX 429 - SUMMIT, NJ 07902-0429**.  
Telephone No ► **9082735085** FAX No. ► \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
► ☒ calendar year **2009** or  
► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	<b>3,000.</b>
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	<b>19,303.</b>
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	<b>0.</b>

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 4-2009)



- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

<b>Part II</b> <b>Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed). <b>Type or print</b> File by the extended due date for filing the return. See instructions.	Name of Exempt Organization		Employer identification number
	CLERMONT FOUNDATION		22-3177379
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O GLORIA CHOONG, PO BOX 429		For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SUMMIT, NJ 07902-0429		

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

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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

MARTHA KEITH, TRUSTEE

- The books are in the care of **C/O GLORIA CHOONG, P.O. BOX 429 - SUMMIT, NJ 07902-0429**

Telephone No. **9082735085**

FAX No. \_\_\_\_\_

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

- 4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010.**
- 5 For calendar year **2009**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.
- 6 If this tax year is for less than 12 months, check reason. ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension  
**TAXPAYER REQUIRES ADDITIONAL TIME IN ORDER TO PREPARE A COMPLETE AND ACCURATE TAX RETURN.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	3,000.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	19,303.
c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

### Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature Patricia A. Oadger Title **CPA**

Date 7/13/10  
Form 8868 (Rev. 4-2009)