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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

OMB No 1545-0052
2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE JAMES HALE STEINMAN FOUNDATION		A Employer identification number 23-6266377	
	Number and street (or P O box number if mail is not delivered to street address) PO BOX 128		Room/suite	B Telephone number (see page 10 of the instructions) (717) 291-8607
	City or town, state, and ZIP code LANCASTER, PA 176080128		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		I Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)		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"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 31,092,398				

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	0			
	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.	856,806	856,806		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-1,962			
	b Gross sales price for all assets on line 6a _____ 8,073,297				
	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				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	854,844	856,806	0	
	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	7,882	0	0	7,882
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	126,908	126,908	0	0
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	39,093	2,868	0	0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	17,555	0	0	2,026
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	191,438	129,776	0	9,908
	25 Contributions, gifts, grants paid	2,453,024			2,453,024
	26 Total expenses and disbursements. Add lines 24 and 25	2,644,462	129,776	0	2,462,932
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,789,618			
	b Net investment income (if negative, enter -0-)		727,030		
	c Adjusted net income (if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	5,234	4,047	4,047
	2	Savings and temporary cash investments	575,177	2,474,647	2,474,647
	3	Accounts receivable _____ Less allowance for doubtful accounts _____			
	4	Pledges receivable _____ Less allowance for doubtful accounts _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) _____ Less allowance for doubtful accounts _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	76,051	39,826	39,826
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	26,668,624	25,022,466	25,467,889
	c	Investments—corporate bonds (attach schedule).	4,906,827	2,921,230	3,105,989
	11	Investments—land, buildings, and equipment basis _____ Less accumulated depreciation (attach schedule) _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis _____ Less accumulated depreciation (attach schedule) _____			
Liabilities	15	Other assets (describe _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	32,231,913	30,462,216	31,092,398
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
Net Assets or Fund Balances	22	Other liabilities (describe _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
		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	44,720,454	44,738,413	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-12,488,541	-14,276,197	
	30	Total net assets or fund balances (see page 17 of the instructions)	32,231,913	30,462,216	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	32,231,913	30,462,216	

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	32,231,913
2	Enter amount from Part I, line 27a	2	-1,789,618
3	Other increases not included in line 2 (itemize) _____	3	19,921
4	Add lines 1, 2, and 3	4	30,462,216
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	30,462,216

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-1,962
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	1,932,734	33,973,246	0 056890
2007	1,723,106	39,083,757	0 044088
2006	1,496,217	34,919,978	0 042847
2005	1,407,037	31,478,047	0 044699
2004	1,468,044	28,629,871	0 051277

2	Total of line 1, column (d).	2	0 239801
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 047960
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	26,586,367
5	Multiply line 4 by line 3.	5	1,275,082
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	7,270
7	Add lines 5 and 6.	7	1,282,352
8	Enter qualifying distributions from Part XII, line 4.	8	2,478,461

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <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	7,270	
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	7,270	
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	7,270	
6		Credits/Payments				
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	39,826		
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	39,826	
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	32,556	
11		Enter the amount of line 10 to be Credited to 2010 estimated tax	32,556	Refunded	11	0

Part VII-AStatements Regarding Activities

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?			Yes	No
				1a		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		1b		No
		If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c		Did the foundation file Form 1120-POL for this year?.		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ 0 (2) On foundation managers \$ _____ 0				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____ 0				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		No
		If "Yes," attach a detailed description of the activities.				
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?.		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
		If "Yes," attach the statement required by General Instruction T.				
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either				
		• By language in the governing instrument, or				
		• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) PA				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14	The books are in care of ▶ITS OFFICERS Telephone no ▶(717) 291-8607 Located at ▶8 W KING ST LANCASTER PA ZIP+4 ▶17608			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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"/>	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?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. <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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

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

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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?

5b

No

6b

No

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CAROLINE S NUNAN	CHAIRMAN	0	0	0
PO BOX 128 LANCASTER, PA 17608	0 10			
BEVERLY R STEINMAN	VICE CHAIRMAN	0	0	0
PO BOX 128 LANCASTER, PA 17608	0 10			
WILLIS W SHENK	TREASURER	0	0	0
PO BOX 128 LANCASTER, PA 17608	0 10			
DENNIS A GETZ	SECRETARY	0	0	0
PO BOX 128 LANCASTER, PA 17608	0 10			

2

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

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

Total

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

0

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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 (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
DOUGLAS C LANE & ASSOCIATES 100 PARK AVENUE 36TH FL NEW YORK, NY 10017	INVESTMENT ADVISORY	110,240
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 SEE PART XV	0
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 THE JAMES HALE STEINMAN FOUNDATION, IN SATISFACTION OF ITS OBLIGATION UNDER A LOAN GAURANTEE TO FULTON BANK, MADE INTEREST PAYMENTS ON BEHALF OF THE PENNSYLVANIA ACADEMY OF MUSIC, A 501(C)(3) EDUCATIONAL INSTITUTION, WHEN THE PENNSYLVANIA ACADEMY OF MUSIC WAS UNABLE TO SERVICE THE LOAN	15,529
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	15,529

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	26,954,125
b	Average of monthly cash balances.	1b	37,111
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	26,991,236
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	26,991,236
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	404,869
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	26,586,367
6	Minimum investment return. Enter 5% of line 5.	6	1,329,318

Part XI

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

1	Minimum investment return from Part X, line 6.	1	1,329,318
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	7,270
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	7,270
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,322,048
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,322,048
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,322,048

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	2,462,932
b	Program-related investments—total from Part IX-B.	1b	15,529
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	2,478,461
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	7,270
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,471,191
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1				1,322,048
2				
a			0	
b		0		
3				
a				
b				
c				
d				
e				217,962
f	217,962			
4				
a			0	
b		0		
c	0			
d				1,322,048
e	1,156,413			
5	0			0
6				
a	1,374,375			
b		0		
c				
d		0		
e			0	
f				0
7	0			
8	0			
9	1,374,375			
10				
a				
b				
c				
d				217,962
e				1,156,413

Part XIV

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

1 Information Regarding Foundation Managers:

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

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

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

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 Additional Data Table				
Total			▶ 3a	2,453,024
b Approved for future payment				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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

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

[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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge			
*****		2010-05-13	*****
Signature of officer or trustee		Date	Title

Paid Preparer's Use Only	Preparer's Signature Wesley S Lewis	Date	Check if self-employed <input checked="" type="checkbox"/>	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code		EIN	
	WESLEY S LEWIS PO BOX 128 LANCASTER, PA 17608		Phone no (717) 291-8607	

Additional Data

Software ID: 09000028

Software Version: 2009.03051

EIN: 23-6266377

Name: THE JAMES HALE STEINMAN FOUNDATION

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
3000 SHARES UNITED HEALTH GRP INC	P	2008-05-21	2009-03-10
300000 PV INTERNATIONAL PAPER NOTE DUE 10/30/12	P	2008-06-16	2009-05-19
250000 PV MBNA AMERICA BANK N A NOTE DUE 8/3/09	P	2008-09-24	2009-08-03
200000 PV GENERAL ELECTRIC CAP CORP NOTE DUE 9/15/09	P	2008-09-25	2009-09-15
200000 PV KRAFT FOODS INC NOTE DUE 11/12/09	P	2008-12-01	2009-11-12
10000 SHARES INTERNATIONAL PAPER CO	P	2009-04-17	2009-12-09
1000 SHARES ASCENT MEDIA CORP	P	2001-07-11	2009-01-09
2000 SHARES TRANSDIGM GRP INC	P	2007-01-23	2009-01-09
9000 SHARES UNITED HEALTH GRP	P	2006-07-25	2009-03-10
5000 SHARES GENENTECH INC	P	2001-07-11	2009-03-25
5000 SHARES IMS HEALTH INC	P	2006-05-01	2009-04-17
2000 SHARES NEWMONT MINING CORP	P	1998-02-25	2009-04-17
5000 SHARES CAMERON INTL CORP	P	2004-02-11	2009-04-17
10000 SHARES TEXAS INSTR INC	P	1998-02-25	2009-04-17
7000 SHARES IMS HEALTH INC	P	2007-04-10	2009-04-17
2000 SHARES APACHE CORP	P	1999-02-08	2009-04-17
2378 SHARES TRANSOCEAN LTD	P	2005-05-11	2009-04-17
8000 SHARES NEWMONT MINING CORP	P	1998-03-24	2009-04-17
0 33 SHARES TIME WARNER INC	P	2001-01-24	2009-04-21
0 80 SHARES TIME WARNER CABLE INC	P	2001-01-24	2009-04-22
100000 PV SPRINT CAP CORP NOTE DUE 5/1/09	P	2003-02-12	2009-05-01
20000 SHARES SCHERING PLOUGH CORP	P	2000-11-06	2009-06-02
3346 03 SHARES TIME WARNER CABLE INC	P	2000-11-06	2009-06-02
250000 PV ANADARKO PETROLEUM CORP NOTE DUE 9/15/09	P	2007-05-07	2009-06-30
200000 PV LIBERTY MEDIA CORP NOTE DUE 7/15/09	P	2007-03-12	2009-07-15
5000 SHARES APPLIED MATERIALS INC	P	2006-01-04	2009-08-06
2000 SHARES DOW CHEMICAL CO	P	2004-04-02	2009-08-06
5000 SHARES INTERNATIONAL PAPER CO	P	2003-02-14	2009-08-06
15000 SHARES LIBERTY GLOBAL INC	P	2001-07-11	2009-08-06
17000 SHARES PATTERSON UTI	P	2004-06-16	2009-08-06

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
56,265		103,101	-46,836
306,000		289,286	16,714
250,000		250,000	0
200,000		200,000	0
200,000		200,000	0
256,086		89,559	166,527
23,737		24,286	-549
66,624		53,237	13,387
168,797		463,408	-294,611
475,000		74,684	400,316
69,182		136,919	-67,737
76,160		54,325	21,835
125,954		54,564	71,390
178,380		146,375	32,005
96,855		196,760	-99,905
138,190		17,909	120,281
163,261		174,311	-11,050
304,640		138,510	166,130
7		43	-36
22		134	-112
100,000		100,000	0
488,693		476,880	11,813
103,222		217,974	-114,752
250,000		250,825	-825
200,000		209,522	-9,522
67,048		92,716	-25,668
45,871		82,807	-36,936
96,536		186,874	-90,338
309,605		352,023	-42,418
238,844		272,781	-33,937

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-46,836
			16,714
			0
			0
			0
			166,527
			-549
			13,387
			-294,611
			400,316
			-67,737
			21,835
			71,390
			32,005
			-99,905
			120,281
			-11,050
			166,130
			-36
			-112
			0
			11,813
			-114,752
			-825
			-9,522
			-25,668
			-36,936
			-90,338
			-42,418
			-33,937

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
5000 SHARES SCHERING-PLOUGH CORP	P	2008-05-21	2009-08-06
2000 SHARES ZIMMER HLDGS INC	P	1990-02-12	2009-08-06
4000 SHARES MICROSOFT CORP CO	P	2007-01-23	2009-10-09
2000 SHARES NEWMONT MINING CORP	P	2000-11-06	2009-10-09
2000 SHARES DOW CHEMICAL CO	P	2006-06-09	2009-10-09
1000 SHARES DOW CHEMICAL CO	P	2006-08-01	2009-10-09
10000 SHARES GANNETT CO INC	P	2008-03-31	2009-10-09
3000 SHARES INTERNATIONAL PAPER CO	P	2005-08-16	2009-10-09
5000 SHARES WYETH	P	2007-04-10	2009-10-09
5000 SHARES WYETH	P	2008-02-14	2009-10-09
1000 SHARES INTERNATIONAL PAPER CO	P	2002-12-30	2009-10-09
1000 SHARES INTERNATIONAL PAPER CO	P	2003-02-14	2009-10-09
4000 SHARES QUALCOMM INC	P	2000-06-10	2009-10-09
5000 SHARES SCHERING PLOUGH CORP	P	2003-02-14	2009-11-03
5000 SHARES SCHERING PLOUGH CORP	P	2003-05-29	2009-11-03
10000 SHARES LIBERTY MEDIS HLDGS CORP	P	2006-11-16	2009-12-09
2000 SHARES EMERSON ELECTRIC CO	P	1999-02-08	2009-12-09
2000 SHARES EMERSON ELECTRIC CO	P	1999-03-30	2009-12-09
2000 SHARES BAKER HUGHES INC	P	2004-04-02	2009-12-09
4000 SHARES BAKER HUGHES INC	P	2004-06-03	2009-12-09
5000 SHARES INTERNATIONAL PAPER CO	P	2008-07-28	2009-12-09
10000 SHARES UTI WORLDWIDE INC	P	2007-06-18	2009-12-09
8000 SHARES MICROSOFT CORP CO	P	2007-01-23	2009-12-09
200000 PV FISHER SCIENTIFIC NOTE DUE 8/15/14	P	2008-05-06	2009-12-17
300000 PV TIMKEN CO NOTE DUE 2/15/10	P	2008-08-28	2009-12-22
0 64 SHARES AOL INC	P	2001-01-24	2009-12-29
3000 UNITS SEAGATE TECHNOLOGY ESCROW	P	2001-01-26	2009-09-22

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
130,397		98,300	32,097
91,588		48,889	42,699
101,877		123,131	-21,254
92,638		27,145	65,493
52,238		77,643	-25,405
26,119		34,253	-8,134
135,396		290,789	-155,393
68,815		93,942	-25,127
245,757		268,726	-22,969
245,757		200,650	45,107
22,938		35,100	-12,162
22,938		35,305	-12,367
165,705		60,240	105,465
52,500		38,418	14,082
52,500		40,510	11,990
102,448		228,305	-125,857
81,537		55,747	25,790
81,537		54,225	27,312
75,660		71,420	4,240
151,320		137,680	13,640
128,043		117,368	10,675
144,800		276,872	-132,072
236,374		244,843	-8,469
206,750		206,000	750
302,365		299,884	2,481
15		61	-46
306			306


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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			32,097
			42,699
			-21,254
			65,493
			-25,405
			-8,134
			-155,393
			-25,127
			-22,969
			45,107
			-12,162
			-12,367
			105,465
			14,082
			11,990
			-125,857
			25,790
			27,312
			4,240
			13,640
			10,675
			-132,072
			-8,469
			750
			2,481
			-46
			306

Form 990PF Part XV Line 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				
AMERICAN CANCER SOCIETY314 GOOD DRIVE LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	500
AMERICAN HEART ASSOCIATION 610 COMMUNITY WAY LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	500
ARC OF LANCASTER COUNTY630 JANET AVE LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	500
BOY SCOUTS OF LANCASTER COUNTY630 Janet Ave Suite B-114 LANCASTER, PA 17601	n/a	puBlic CHARITY	DISTINGUISHED CITIZEN DINNER	2,500
BOY SCOUTS OF LANCASTER COUNTY630 Janet Ave Suite B-114 LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	1,000
BOYS & GIRLS CLUB OF LANCASTER116 S Water Street LANCASTER, PA 17603	N/A	PUBLIC CHARITY	SUMMER CAMP	20,000
BOYS & GIRLS CLUB OF LANCASTER116 S Water Street LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	25,000
central market foundation23 N MARKET STREET LANCASTER, PA 17608	N/A	PUBLIC CHARITY	CAPITAL CAMPAIGN	25,000
CHESAPEAKE BAY FOUNDATION 614 N Front St G Harrisburg, PA 17101	N/A	PUBLIC CHARITY	OPERATIONS	5,000
CHURCH FARM SCHOOL1001 E Lincoln Hwy Exton, PA 19341	N/A	PUBLIC CHARITY	OPERATIONS	1,500
CLARE HOUSE342 E Chestnut St 344 LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	5,000
CLINIC FOR SPECIAL CHILDREN 535 BUNKER HILL RD Strasburg, PA 17579	N/A	PUBLIC CHARITY	EXPANSION	10,000
COBY'S FAMILY SERVICES1417 Oregon Road Leola, PA 17540	N/A	PUBLIC CHARITY	OPERATIONS	2,000
CONESTOGA HOUSE FOUNDATION8 W KING ST LANCASTER, PA 17608	N/A	PRIVATE FOUNDATION	2009 SUPPORT	522,274
CONTACT LANCASTER HELPLINE 601 S Queen St LANCASTER, PA 17608	N/A	PUBLIC CHARITY	OPERATIONS	2,500
Total ▶ 3a				2,453,024


Form 990PF Part XV Line 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				
CRIME STOPPERSN RONKS RD Ronks, PA 17573	N/A	PUBLIC CHARITY	FUNDING FOR REWARD	5,000
CRISPUS ATTUCKS407 Howard Ave LANCASTER, PA 17602	N/A	PUBLIC CHARITY	ANNUAL SUPPORT	5,000
DEMUTH FOUNDATION120 E King St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	2,500
DOLLARS FOR SCHOLARS1550 AMERICAN BLVD MINNEAPOLIS, MN 55425	N/A	PUBLIC CHARITY	OPERATIONS	500
FARM & HOME CENTER1383 Arcadia Rd LANCASTER, PA 17601	N/A	PUBLIC CHARITY	CAPITAL CAMPAIGN	20,000
FELDER & WRIGHT INDEPENDENT LIVING AND AFTERCARE SERVICES800 E KING STREET LANCASTER, PA 17602	N/A	LONG TERM CARE FACIL	NEW FACILITY REQUIREMENTS	7,500
FRANKLIN & MARSHALL COLLEGE 415 Harrisburg Ave LANCASTER, PA 17601	N/A	PRIVATE COLLEGE	LIFE SCIENCES BUILDING	50,000
FULTON OPERA HOUSE12 N Prince St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	1,500
HARRISBURG AREA COMMUNITY COLLEGEONE HACC DRIVE HARRISburg, PA 17110	N/A	PUBLIC COLLEGE	SCHOLARSHIP FUND	10,000
HEALTH EDUCATION CENTER410 North Lime St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	PROGRAMMING	10,000
HERITAGE CENTER MUSEUM7 W King St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	BUILDING RENOVATIONS	45,000
HERITAGE CENTER MUSEUM7 W King St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	12,500
HISTORIC PRESERVATION TRUST 123 N Prince St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	HISTORIC SITE PROJECT	30,000
HISTORIC PRESERVATION TRUST 123 N Prince St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	2,500
HOPE WITHIN COMMUNITY HEALTH CENTER4748 E HARRISBURG PIKE ELIZABETHTOWN, PA 17022	N/A	PUBLIC CHARITY	OPERATIONS	5,000
Total  3a				2,453,024


Form 990PF Part XV Line 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				
HOSPICE OF LANCASTER685 Good Dr LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	60,000
HOSPICE OF LANCASTER685 Good Dr LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	1,000
JAMES STREET IMPROVEMENT DISTRICT354 N PRINCE ST SUITE 110 LANCASTER, PA 17603	N/A	PUBLIC CHARITY	EXPANSION	75,000
JHSF SCHOLARSHIPS8 W KING ST LANCASTER, PA 17608	N/A	N/A	CHARITABLE	90,000
JUNIOR ACHIEVEMENT1322 Loop Rd LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	3,000
KEYSTONE ART CENTER420 Pearl St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	7,500
LANCASTER ALLIANCE44 NORTH QUEEN ST LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	12,500
LANCASTER CATHOLIC HIGH SCHOOL650 JULIETTE AVE LANCASTER, PA 17601	N/A	PRIVATE HIGH SCHOOL	OPERATIONS	500
LANCASTER CLEFT PALATE CLINIC 223 N Lime St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	2,000
LANCASTER COMMUNITY SAFETY COALITION262 CONESTOGA ST LANCASTER, PA 17603	N/A	PUBLIC CHARITY	SECURITY CAMERAS	400,000
LANCASTER COUNTRY DAY SCHOOL725 Hamilton Rd LANCASTER, PA 17603	N/A	PRIVATE HIGH SCHOOL	CAPITAL CAMPAIGN	150,000
LANCASTER COUNTRY DAY SCHOOL725 Hamilton Rd LANCASTER, PA 17603	N/A	PRIVATE HIGH SCHOOL	OPERATIONS	5,000
LANCASTER COUNTY CONSERVANCY117 South West End Avenue LANCASTER, PA 17608	N/A	PUBLIC CHARITY	OPERATIONS	7,500
LANCASTER COUNTY CONSERVANCY117 South West End Avenue LANCASTER, PA 17608	N/A	PUBLIC CHARITY	MCKINNEY PROPERTY	12,500
LANCASTER COUNTY HISTORICAL SOCIETY230 N PRESIDENT STREET LANCASTER, PA 17603	N/A	PUBLIC CHARITY	CAMPUS OF HISTORY	12,500
Total  3a				2,453,024

Form 990PF Part XV Line 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				
LANCASTER FARMLAND TRUST125 Lancaster Avenue Strasburg, PA 17579	N/A	PUBLIC CHARITY	OPERATIONS	25,000
LANCASTER MORAVIAN CHURCH1460 Eden Rd LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	500
LANCASTER MUSEUM OF ART135 N Lime St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	ANNUAL SUPPORT	1,000
LANCASTER PARTNERSHIP PROGRAM-MILLERSVILLE UNIVERSITY1 S GEORGE ST MILLERSVILLE, PA 17551	N/A	PUBLIC UNIVERSITY	SCHOLARSHIP FUND	10,000
LANCASTER PUBLIC LIBRARY125 N Duke St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	2,500
LANCASTER SCIENCE CENTER454 NEW HOLLAND AVENUE LANCASTER, PA 17602	N/A	PUBLIC CHARITY	CAPITAL CAMPAIGN	30,000
LANCASTER SUMMER ARTS FESTIVAL13 N LIME STREET LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	2,500
LANCASTER SYMPHONY ORCHESTRA226 N Arch St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	1,750
LINDEN HALL SCHOOL FOR GIRLS212 East Main Street Lititz, PA 17543	N/A	PRIVATE SCHOOL	OPERATIONS	2,000
LITITZ COMMUNITY CENTER301 MAPLE ST Lititz, PA 17543	N/A	PUBLIC CHARITY	CAPITAL CAMPAIGN	25,000
LONG HOME200 N WEST End Ave LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	33,000
LONGS PARK630 JANET AVE LANCASTER, PA 17608	N/A	PUBLIC CHARITY	PATRIOTIC CONCERT	2,000
MARTIN LUTHER KING SCHOLARSHIP FUND1641 Old Philadelphia Pike LANCASTER, PA 17602	N/A	PUBLIC CHARITY	SCHOLARSHIP FUND	2,000
MENNONITE HISTORICAL SOCIETY2215 Millstream Road LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	500
MILAGRO HOUSE669 West Chestnut Street LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	7,500
Total  3a				2,453,024

Form 990PF Part XV Line 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				
MOM'S HOUSE415 S Queen St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	2,500
MULTIPLE SCLEROSIS SOCIETY 1630 Manheim Pike 8 LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	1,000
NATIONAL WATCH AND CLOCK MUSUEM514 POPLAR ST COLUMBIA, PA 17512	N/A	PUBLIC CHARITY	OPERATIONS	2,500
NEW HOLLAND REC CENTER123 N SHIRK ROAD NEW HOLLAND, PA 17557	N/A	PRIVATE CHARITY	CONSTRUCTION	25,000
OCTORARO WATERSHED ASSOCIATION517 Pine Grove Rd Nottingham, PA 19362	N/A	PUBLIC CHARITY	OPERATIONS	2,000
PA COLLEGE OF ART AND DESIGN 204 N PRINCE ST LANCASTER, PA 17608	N/A	PRIVATE COLLEGE	SCHOLARSHIP FUND	12,500
PENN STATE COLLEGE OF COMMUNICATIONS301 JAMES BLDG UNIVERSITY PARK, PA 16802	N/A	PUBLIC UNIVERSITY	SCHOLARSHIP FUND	12,500
PENNSYLVANIA ACADEMY OF MUSIC313 W LIBERTY ST LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	10,000
PENNSYLVANIA ACADEMY OF MUSIC313 W LIBERTY ST LANCASTER, PA 17603	N/A	PUBLIC CHARITY	MAJOR CAMPAIGN	200,000
PHILHAVEN HOSPITAL1884 Rohrerstown Rd LANCASTER, PA 17601	N/A	COMMUNITY HOSPITAL	OPERATIONS	500
PHILHAVEN HOSPITAL1884 Rohrerstown Rd LANCASTER, PA 17601	N/A	COMMUNITY HOSPITAL	COMMUNITY CENTER	40,000
PLANNED PARENTHOOD31 S Lime St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	1,500
PROJECT FORWARD LEAP1706 Race Street 2nd Floor Philadelphia, PA 19103	N/A	PUBLIC CHARITY	PROGRAM PLEDGE	10,000
ROCK FORD FOUNDATION881 Rockford Rd LANCASTER, PA 17602	N/A	PUBLIC CHARITY	REV WAR ENCAMPMENT	5,000
ROCK FORD FOUNDATION881 Rockford Rd LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	1,000
Total  3a				2,453,024

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
S JUNE SMITH FOUNDATION600 Eden Rd I LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	2,500
SPANISH AMERICAN CIVIC ASSOCIATION545 Pershing Ave LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	1,000
SPINA BIFIDA ASSOCIATION215 E State St D Quarryville, PA 17566	N/A	PUBLIC CHARITY	OPERATIONS	1,000
ST JAMES EPISCOPAL CHURCH119 N DUKE STREET LANCASTER, PA 17602	N/A	PUBLIC CHARITY	OPERATIONS	5,000
SUSQUEHANNA ASSOCIATION FOR THE BLIND244 North Q ueen Street LANCASTER, PA 17603	N/A	PUBLIC CHARITY	OPERATIONS	1,500
THE JANUS SCHOOL205 LEFEVER ROAD MOUNT JOY, PA 17552	N/A	PRIVATE SCHOOL	CAPITAL CAMPAIGN	100,000
THEATER OF THE SEVENTH SISTER 451 E Ross St LANCASTER, PA 17602	N/A	PUBLIC CHARITY	HERITAGE DRAMA	25,000
UNITED DISABILITIES SERVICES 1901 Olde Homestead Ln LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	3,000
UNITED WAY OF LANCASTER630 JANET AVE LANCASTER, PA 17601	N/A	PUBLIC CHARITY	OPERATIONS	78,500
WATER STREET RESCUE MISSION 210 S Prince St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	RESCUE LIVES	40,000
YMCA OF LANCASTER572 N Queen St LANCASTER, PA 17603	N/A	PUBLIC CHARITY	ANNUAL CAMPAIGN	55,000
Total ▶ 3a				2,453,024

**TY 2009 Investments Corporate
Bonds Schedule****Name:** THE JAMES HALE STEINMAN FOUNDATION**EIN:** 23-6266377

Name of Bond	End of Year Book Value	End of Year Fair Market Value
200000 PV COX COMM NOTE DUE 01/15/10	199,652	200,166
100000 PV DONNELLEY RR & SONS NOTE DUE 05/15/10	95,750	100,714
100000 PV ALCOA INC NOTE DUE 8/01/10	104,830	103,160
200000 PV WASTE MGMT NOTE DUE 08/01/10	197,900	207,172
300000 PV GENERAL MILLS NOTE DUE 10/15/10	324,900	324,711
300000 PV VERIZON COMM NOTE DUE 02/15/01	294,186	312,822
200000 PV VIACOM NOTE DUE 05/15/11	201,580	209,592
300000 PV XEROX CORP NOTE DUE 8/15/11	302,376	320,568
200000 PV AT & T NOTE DUE 11/15/11	198,638	220,214
300000 PV WEYERHAEUSER CO NOTE DUE 03/15/12	296,808	317,841
150000 PV AOL TIME WARNER NOTE DUE 05/1/12	136,238	164,211
200000 PV LAMAR MEDIA CORP NOTE DUE 1/1/13	198,000	199,500
200000 PV AMERICAN EXPRESS NOTE DUE 05/02/13	194,960	214,632
200000 PV ALCOA INC NOTE DUE 07/15/13	175,412	210,686

TY 2009 Investments Corporate
Stock Schedule

Name: THE JAMES HALE STEINMAN FOUNDATION
EIN: 23-6266377

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4000 SHARES CHEVRON CORP	12,723	307,960
4000 SHARES EXXON MOBIL CORP	42,984	272,760
6000 SHARES SCHLUMBERGER LTD	194,726	390,540
20000 SHARES ALCOA INC	501,256	322,400
17000 SHARES DOW CHEMICAL CO	252,442	469,710
4000 SHARES ECOLAB INC	165,006	178,320
5000 SHARES NEWMONT MINING	67,863	236,550
1000 SHARES PRAXAIR	81,603	80,310
18000 SHARES SONOCO PRODUCTS CO	384,989	526,500
12000 SHARES AVERY DENNISON	584,683	437,880
10000 SHARES EMERSON ELECTRIC	185,794	426,000
10000 SHARES EXPEDITORS INTL	369,552	347,700
35000 SHARES GENERAL ELECTRIC CO	905,953	529,550
10000 SHARES HUBBELL INC. CL A	410,984	453,000
55000 SHARES SOUTHWEST AIRLINES	713,242	628,650
3000 SHARES STERICYCLE	147,957	165,510
3000 SHARES 3M	196,259	248,010
2000 SHARES UNITED TECH CORP	95,432	138,820
40000 SHARES COMCAST CO.	845,936	640,400
20000 SHARES WALT DISNEY CO.	397,081	645,000
10000 SHARES DISCOVERY COMMUNICATIONS	147,746	306,700
10000 SHARES DISCOVERY COMMUNICATIONS	132,658	265,200
30000 SHARES GANNETT INC	343,443	445,500
10000 SHARES LAMAR ADVERTISING	356,905	310,900
20000 SHARES LIBERTY MEDIA	222,907	216,800
30000 SHARES NEWS CORP.	479,520	410,700
50000 SHARES SERVICE CORP	362,150	409,500
10000 SHARES THOMSON REUTERS	322,206	322,500
15000 SHARES TIME WARNER	659,169	437,100
17000 SHARES CAMPBELL SOUP	452,139	574,600

Name of Stock	End of Year Book Value	End of Year Fair Market Value
13000 SHARES COCA-COLA CO	628,785	741,000
10000 SHARES GENERAL MILLS INC	500,204	708,100
10000 SHARES HEINZ HJ	360,288	427,600
5000 SHARES KIMBERLY CLARK	280,991	318,550
13000 SHARES KRAFT FOODS	391,961	353,340
3000 SHARES MCCORMICK & CO	86,257	108,390
4000 SHARES NESTLE SA	167,348	193,400
5000 SHARES PEPSICO INC	208,932	304,000
9750 SHARES P & G CO	317,205	591,142
5000 SHARES SYSCO CORP	142,340	139,700
5000 SHARES UNILEVER NV	147,669	161,650
10000 SHARES QIAGEN NV	143,314	223,300
8000 SHARES ABBOTT LABS	323,288	431,920
3000 SHARES AMGEN INC	167,767	169,710
40000 SHARES BOSTON SCIENTIFIC	709,228	360,000
15000 SHARES BRISTOL MYERS SQUI	338,874	378,750
3000 SHARES CERNER	112,347	247,320
10000 SHARES DENTSPLY INTL	271,361	351,700
12000 SHARES MEDTRONIC	530,298	527,760
15767 SHARES MERCK & CO	503,482	576,126
2000 SHARES MILLIPORE CORP	153,335	144,700
10000 SHARES NOVARTIS AG	552,964	544,300
3000 SHARES AIG	1,087,181	89,940
50000 SHARES CITIGROUP	188,855	165,500
1000 SHARES HSBC HLDGS	57,044	57,090
30000 SHARES ISTAR FIN	381,833	76,800
25000 SHARES MARSH & MCLENNAN	710,656	552,000
2000 SHARES US BANCORP	45,787	45,020
1363 SHARES AOL INC	48,151	31,731
30000 SHARES APPLIED MATL INC	527,364	418,200

Name of Stock	End of Year Book Value	End of Year Fair Market Value
20000 SHARES CISCO SYSTEMS	256,606	478,800
20000 SHARES EBAY INC	676,711	470,600
15000 SHARES INTEL CORP	255,450	306,000
35000 SHARES JDS UNIPHASE	864,026	288,750
10000 SHARES LINEAR TECH CORP	321,232	305,600
1000 SHARES MASTERCARD INC	187,302	255,980
10000 SHARES MICROSOFT CORP	284,304	304,800
15000 SHARES MICROCHIP TECH	462,287	435,750
12000 SHARES QUALCOMM INC	37,475	555,120
30000 SHARES VISA INC	204,508	262,380
20000 SHARES WESTERN UNION CO	469,789	377,000
15000 SHARES VERIZON COMM	475,488	496,950
15000 SHARES VODAFONE GRP PLC	406,871	346,350

TY 2009 Legal Fees Schedule

Name: THE JAMES HALE STEINMAN FOUNDATION

EIN: 23-6266377

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ATTORNEY FEES	7,882	0	0	7,882

TY 2009 Other Expenses Schedule**Name:** THE JAMES HALE STEINMAN FOUNDATION**EIN:** 23-6266377

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursement s for Charit able Purposes
BANK FEES	464	0	0	464
PA FILING FEE	15	0	0	15
SOFTWARE EXPENSE	1,547	0	0	1,547
BAD DEBT - PROGRAM RELATED INVESTMENT	15,529	0	0	0

TY 2009 Other Increases Schedule

Name: THE JAMES HALE STEINMAN FOUNDATION

EIN: 23-6266377

Description	Amount
ACCREDITED BOND DISCOUNTS	19,921

TY 2009 Other Professional Fees Schedule

Name: THE JAMES HALE STEINMAN FOUNDATION

EIN: 23-6266377

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT COUNSEL FEES	110,240	110,240	0	0
MELLON CUSTODIAL FEES	16,668	16,668	0	0

TY 2009 Taxes Schedule

Name: THE JAMES HALE STEINMAN FOUNDATION

EIN: 23-6266377

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
US EXCISE TAX	36,225	0	0	0
FOREIGN tAX	2,868	2,868	0	0