



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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 Brunckhorst Foundation		A Employer identification number 23-7000850	
	Number and street (or P O box number if mail is not delivered to street address) 24 Rock Street	Room/suite	B Telephone number (see page 10 of the instructions) (516) 496-9195	
	City or town, state, and ZIP code Brooklyn, NY 11206		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"/> 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"/>	
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 Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 61,184,082		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	2,000,000			
	2 Check <input 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.	2,812,482	2,812,482		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-23,053			
	b Gross sales price for all assets on line 6a _____ 21,050,045				
	7 Capital gain net income (from Part IV , line 2)				
	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	4,789,429	2,812,482		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	28,122			
	19 Depreciation (attach schedule) and depletion	0			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,895	275		1,620
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	30,017	275		1,620
	25 Contributions, gifts, grants paid	2,857,500			2,857,500
	26 Total expenses and disbursements. Add lines 24 and 25	2,887,517	275		2,859,120
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,901,912			
	b Net investment income (if negative, enter -0-)		2,812,207		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	31,915	30,125	30,125
	2	Savings and temporary cash investments	43,715	1,226,689	1,226,689
	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	110,941	82,819	82,819
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	3,184,156	4,353,478	4,403,047
	c	Investments—corporate bonds (attach schedule).	53,371,699	53,151,227	55,375,572
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	285,000	85,000	65,830
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	57,027,426	58,929,338	61,184,082	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances		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	57,027,426	58,929,338	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	57,027,426	58,929,338	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	57,027,426	58,929,338	

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	57,027,426
2	Enter amount from Part I, line 27a	2	1,901,912
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	58,929,338
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	58,929,338

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	-23,053
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	-5,655

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	2,801,000	55,261,303	0 05069
2007	2,425,750	47,999,745	0 05054
2006	2,000,750	42,162,635	0 04745
2005	1,370,848	33,905,236	0 04043
2004	1,055,750	28,446,902	0 03711

2	Total of line 1, column (d).	2	0 22622
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 04524
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	57,498,821
5	Multiply line 4 by line 3.	5	2,601,477
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	28,122
7	Add lines 5 and 6.	7	2,629,599
8	Enter qualifying distributions from Part XII, line 4.	8	2,859,120

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	28,122
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	
3		Add lines 1 and 2.		3	28,122
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	28,122
6		Credits/Payments			
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	110,941	
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	110,941
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	82,819
11		Enter the amount of line 10 to be Credited to 2010 estimated tax	82,819	Refunded	11

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)?			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 \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
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		No
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 <ul style="list-style-type: none">By language in the governing instrument, orBy 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) NY _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	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 Richard Kandel Telephone no (516) 496-9195 Located at 100 Crossways Park West Woodbury NY ZIP+4 11797			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
		15		

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. Yes No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). Yes No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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?. 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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.).	3b		No
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.

☒

5b

No

c

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

☐ Yes ☒ No

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

6a

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

☐ Yes ☒ No

b

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

☐ Yes ☒ No

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

6b

No

7a

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

☐ Yes ☒ No

b

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

☐ Yes ☒ No

7b

No

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
Richard Todd Stravitz	Trustee	0		
301 West Drive Circle	0 00			
Richmond, VA 23229				
Barbara Brunckhorst	Trustee	0		
7960 Sanderling Road	10 00			
Sarasota, FL 34242				
Frank Brunckhorst III	Trustee	0		
1400 Ladue Lane	0 00			
Sarasota, FL 34231				

2

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

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

Total

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

☒

Part VIII

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

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	57,449,164
b	Average of monthly cash balances.	1b	925,274
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	58,374,438
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	
3	Subtract line 2 from line 1d.	3	58,374,438
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	875,617
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	57,498,821
6	Minimum investment return. Enter 5% of line 5.	6	2,874,941

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	2,874,941
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	28,122
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	28,122
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,846,819
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	2,846,819
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	2,846,819

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	2,859,120
b	Program-related investments—total from Part IX-B.	1b	
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	2,859,120
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	28,122
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,830,998
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7			
2	Undistributed income, if any, as of the end of 2008			
a	Enter amount for 2008 only.			
b	Total for prior years 20____, 20____, 20____			
3	Excess distributions carryover, if any, to 2009			
a	From 2004.			
b	From 2005.			
c	From 2006.			
d	From 2007.			
e	From 2008.			
f	Total of lines 3a through e.			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 2,859,120			
a	Applied to 2008, but not more than line 2a			
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .			
d	Applied to 2009 distributable amount.			
e	Remaining amount distributed out of corpus			
5	Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)			
6	Enter the net total of each column as indicated below:			
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5			
b	Prior years' undistributed income Subtract line 4b from line 2b.			
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions. . .			
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions.			
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.			
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).			
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a.			
10	Analysis of line 9			
a	Excess from 2005.			
b	Excess from 2006.			
c	Excess from 2007.			
d	Excess from 2008.			
e	Excess from 2009.			

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

Barbara Brunckhorst

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

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

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

a

The name, address, and telephone number of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	2,857,500
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	2,812,482	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	-23,053	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .				2,789,429	
13 Total. Add line 12, columns (b), (d), and (e).					2,789,429

[illegible]

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.			
*****		2010-05-12	*****
Signature of officer or trustee		Date	Title

Paid Preparer's Use Only	Preparer's Signature Richard Kandel	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	
	KANDEL & COMPANY 100 Crossways Park W Ste 210 Woodbury, NY 11797		Phone no (516) 496-9195	

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div>	<div>OMB No 1545-0047</div>
		<div>2009</div>

<div>Name of organization</div> <div>The Brunckhorst Foundation</div>	<div>Employer identification number</div> <div>23-7000850</div>
---	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<div><input type="checkbox"/> 501(c)() (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule—

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of \$5,000 or more during the year ▶ \$ _____

Caution. An Organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization The Brunckhorst Foundation	Employer identification number 23-7000850
---	---

Part I

Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Barbara Brunckhorst 7960 Sanderling Road Sarasota, FL 34242	\$ 2,000,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization The Brunckhorst Foundation	Employer identification number 23-7000850
--	--

Part II Noncash Property (see Instructions)			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization The Brunckhorst Foundation	Employer identification number 23-7000850
--	--

Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete columns (a) through (e) and the following line entry)

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ➤ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		

Additional Data

Software ID: 09000047

Software Version:

EIN: 23-7000850

Name: The Brunckhorst 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)
900,000 Wells Fargo Global-3 125%,4/1/09	P	2004-06-09	2009-04-01
100,000 United Healthcare-4 125%,8/15/09	P	2006-10-18	2009-08-17
500,000 Suntrust Banks-4 25%,10/15/09	P	2004-12-04	2009-10-15
400,000 Royal Bank Scotland-6 4%,4/1/09	P	2006-09-14	2009-04-01
250,000 Pfizer Inc-3 3%,3/2/09	P	2006-05-31	2009-03-02
400,000 Merrill Lynch Co-4 125%,9/10/09	P	2004-11-18	2009-09-10
100,000 Merrill Lynch Co-4 75%,11/20/09	P	2006-03-21	2009-11-20
250,000 JP Morgan Chase-3 8%,10/2/09	P	2007-01-09	2009-10-02
1,150,000 JP Morgan Chase-3 8%,10/2/09	P	2005-06-30	2009-06-15
200,000 JP Morgan Chase-3 5%,3/15/09	P	2005-06-10	2009-03-16
650,000 Int'l Lease Finance Corp-4 75%,07/1/09	P	2006-09-19	2009-07-01
500,000 IBM Corp-5 375%,2/1/09	P	2006-06-13	2009-02-02
600,000 HSBC Bank USA-3 875%,9/15/09	P	2006-01-03	2009-09-15
200,000 Household Fin'l Corp-3 875%,11/16/09	P	2004-12-13	2009-11-16
200,000 GE Capital Corp-5 25%,10/27/09	P	2007-02-01	2009-10-27
421,000 GE Capital Corp-4 625%,9/15/09	P	2004-03-11	2009-09-15
250,000 GE Capital Corp-4 125%,9/1/09	P	2006-06-06	2009-09-01
1,200,000 GE Capital Corp-4%,2/17/09	P	2005-08-29	2009-02-18
75,000 GE Capital Corp-3 875%,7/15/09	P	2004-11-29	2009-07-15
1,100,000 GE Capital Corp-3 75%,12/15/09	P	2005-06-09	2009-12-15
1,320,000 GE Capital Corp-3 25%,6/1/09	P	2005-10-11	2009-06-01
500,000 GE Capital Corp-3 125%,4/1/09	P	2005-02-25	2009-04-01
300,000 Deutsche Bank AG-5 375%,10/12/12	P	2007-10-16	2009-02-02
685,000 Credit Suisse FB USA-4 7%,6/1/09	P	2004-12-04	2009-06-01
400,000 Citigroup Global-4 25%, 7/29/09	P	2005-06-09	2009-07-29
1,000,000 Citigroup Global-3 625%,2/9/09	P	2005-02-28	2009-02-09
100,000 Bellsouth Tele-4 25%,9/15/09	P	2006-09-26	2009-09-15
100,000 Bear Stearns Global-3 25%,3/25/09	P	2004-09-28	2009-03-25
400,000 Bank of America-3 375%,2/17/09	P	2005-04-18	2009-02-17
500,000 American General Fin'l-4 625%,5/15/09	P	2004-11-17	2009-05-15

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)
900,000		900,000	
100,000		100,000	
500,000		500,000	
400,000		400,000	
250,000		250,000	
400,000		400,000	
100,000		100,000	
250,000		250,000	
1,150,000		1,150,000	
200,000		200,000	
650,000		650,000	
500,000		500,000	
600,000		600,000	
200,000		200,000	
200,000		200,000	
421,000		421,000	
250,000		250,000	
1,200,000		1,200,000	
75,000		75,000	
1,100,000		1,100,000	
1,320,000		1,320,000	
500,000		500,000	
300,000		300,000	
685,000		685,000	
400,000		400,000	
1,000,000		1,000,000	
100,000		100,000	
100,000		100,000	
400,000		400,000	
500,000		500,000	

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

[illegible]

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)
250,000 American Express-4 375%,7/30/09	P	2006-10-03	2009-07-30
1,470,000 Allstate Life Global-4 5%,5/29/09	P	2005-06-29	2009-05-01
1,000,000 Abbott Labs-3 5%,2/17/09	P	2006-06-01	2009-02-17
2,000 Teekay LNG Partners LP	P	2009-10-13	2009-12-03
2,500 Bristol Myers Squibb	P	2009-10-02	2009-12-03
6,000 JP Morgan Chase Cap-8 625% Pfd	P	2008-08-14	2009-08-18
10,000 Wells Fargo Cap-8 625% Pfd	P	2008-08-12	2009-08-06
29,230 Citigroup Inc	P	2009-07-06	2009-08-03
4,000 GE Capital Corp-6% Pfd	P	2008-06-19	2009-07-27
9,000 AT&T Pfd-6 375%,2/15/56	P	2008-06-30	2009-07-20
8,000 Corts Trust V Pfd-IBM-6 4%,	P	2006-09-22	2009-06-19
200,000 Ginnie Mae-4 5%,1/15/09	P	2005-02-25	2009-05-21
500,000 Merrill Lynch Co-4 125%,1/15/09	P	2005-10-12	2009-01-15
945,000 Goldman Sachs Group-3 875%,1/15/09	P	2005-04-18	2009-01-15
825,000 Credit Suisse FB-3 875%,1/15/09	P	2005-03-04	2009-01-15

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)
250,000		250,000	
1,470,000		1,470,000	
1,000,000		1,000,000	
46,718		52,270	-5,552
62,579		56,236	6,343
157,142		150,000	7,142
251,030		250,000	1,030
92,524		100,000	-7,476
85,297		102,520	-17,223
223,631		224,276	-645
192,129		200,000	-7,871
197,995		200,000	-2,005
500,000		498,569	1,431
945,000		943,749	1,251
825,000		824,478	522


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) FM V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-5,552
			6,343
			7,142
			1,030
			-7,476
			-17,223
			-645
			-7,871
			-2,005
			1,431
			1,251
			522

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>				
Suncoast Seabird Sanctuary18328 Gulf Blvd Indian Shores, FL 33785	N/A	Public	General Purpose	50,000
Nature Conservancy222 S Westmonte Drive-Ste 300 Altamonte Springs, FL 32714	N/A	Public	General Purpose	150,000
Espanola Valley Humane Society108 Hamm Parkway Espanola, NM 87532	N/A	Public	General Purpose	12,500
Conservation Fund1655 N Fort Myers Dr-Ste 1300 Arlington, VA 22209	N/A	Public	General Purpose	150,000
Sierra Club Foundation111 2nd Avenue-Ste1001 St Petersburg, FL 33701	N/A	Public	General Purpose	200,000
Nature Conservancy490 Westfield Road Charlottesville, VA 22901	N/A	Public	General Purpose	150,000
Santa Fe Animal Shelter Humane Soci100 Caja Del Rio Road Santa Fe, NM 87507	N/A	Public	General Purpose	35,000
Natural Resources Defense Council40 West 20th Street New York, NY 10011	N/A	Public	General Purpose	150,000
National Wildlife Foundation11100 Wildlife Center Drive Reston, VA 20190	N/A	Public	General Purpose	50,000
American Rivers1101 14th Street NW-Ste 1400 Washington, DC 20005	N/A	Public	General Purpose	150,000
Tri County Humane Society21287 Boca Rio Road Boca Raton, FL 33433	N/A	Public	General Purpose	75,000
Earth Justice111 S Martin Luther King Blvd Tallahassee, FL 32301	N/A	Public	General Purpose	150,000
NY Foundling Hospital590 Ave of the Americas New York, NY 10011	N/A	Public	General Purpose	50,000
Humane Society of Sarasota2331 15th Street Sarasota, FL 34237	N/A	Public	General Purpose	60,000
Riverside School2110 McRae Road Richmond, VA 23235	N/A	Public	General Purpose	50,000
Total ▶ 3a				2,857,500

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				
Environmental Defense Fund257 Park Ave South New York, NY 10010	N/A	Public	General Purpose	200,000
Center for Reproductive Law Policy120 Wall Street New York, NY 10005	N/A	Public	General Purpose	175,000
Conservation Fund224 Datura Street-Ste 209 W Palm Beach, FL 33401	N/A	Public	General Purpose	150,000
SPCA of Richmond2519 Hermitage Road Richmond, VA 23220	N/A	Public	General Purpose	100,000
Chesapeake Bay Foundation6 Herndon Avenue Annapolis, MD 21403	N/A	Public	General Purpose	200,000
So Environmental Law Ctr201 West Main St-Ste 14 Charlottesville, VA 22902	N/A	Public	General Purpose	200,000
Planned Parenthood736 Central Ave Sarasota, FL 34236	N/A	Public	General Purpose	200,000
Sierra Club Foundation422 E Franklin St-Ste 302 Richmond, VA 23219	N/A	Public	General Purpose	150,000
Total  3a				2,857,500

TY 2009 Investments Corporate
Bonds Schedule

Name: The Brunckhorst Foundation

EIN: 23-7000850

Software ID: 09000047

Software Version: 2009v1.3

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Western Union Co-6.5%, 2/26/14	170,703	177,881
Wells Fargo Co-4.95%, 10/16/13	295,301	313,995
Well Point Inc-6%, 2/15/14	736,519	759,143
Walt Disney Co-4.5%, 12/15/13	175,739	180,583
Wachovia Bank-5.25%, 8/1/14	202,215	207,052
Wachovia Bank-4.8%, 11/1/14	483,695	511,140
US Bank NA Notes-4.95%, 10/30/14	357,158	371,214
United Healthcare Group-5%, 8/15/14	255,243	258,925
Unilever Capital-3.65%, 2/15/14	101,622	102,989
Tyco Int'l Group	209,661	217,840
Staples Inc-9.75%, 1/15/14	71,930	73,107
SBC Communications-5.1%, 9/15/14	103,187	107,566
Prudential Fin'l-5.1%, 9/20/14	255,834	260,660
Procter & Gamble-4.6%, 1/15/14	319,531	319,434
Potash Corp-5.25%, 5/15/14	150,346	155,817
PNC Funding Corp-5.25%, 11/15/15	258,806	257,090
Philip Morris-6.875%, 3/17/14	109,217	113,312
Paccar Inc-6.875%, 2/15/14	207,154	225,612
NYSE Euronext-4.8%, 6/28/13	70,420	73,439
National City Bank-4%, 2/1/11	188,505	203,750
Morgan Stanley-6%, 5/13/14	101,827	107,520
Morgan Stanley-4.75%, 4/1/14	398,575	402,300
MetLife-5.5%, 6/15/14	509,921	530,230
Merrill Lynch Co-5.3%, 9/30/15	207,560	203,654
Mellon Funding-5%, 12/1/14	411,680	426,136
Medtronics Inc-1.625%, 4/15/13	183,121	208,750
Marathon Oil-6.5%, 2/15/14	208,749	221,232
JP Morgan Chase-5.375%, 1/15/14	200,861	214,114
JP Morgan Chase-5.125%, 9/15/14	206,290	210,952
JP Morgan Chase-4.65%, 6/1/14	776,691	816,416
John Deere Cap Corp-4.9%, 9/9/13	102,101	107,496
International Paper-5.3%, 4/1/15	204,364	206,180
HSBC Finance Corp-5%, 6/30/15	409,322	413,200
Hewlett Packard-6.125%, 5/1/14	107,252	111,739
Goldman Sachs Group-6%, 5/1/14	204,771	218,754
Goldman Sachs Group-5.25%, 10/15/13	203,413	212,402
Goldman Sachs Group-5%, 10/1/14	347,731	369,075
Glaxo Smithkline Cap-4.375%, 4/15/14	102,400	104,900
GE Capital Corp-11/1/12	81,505	96,441
GE Capital Corp-5.9%, 5/13/14	521,538	540,535
GE Capital Corp-5.65%, 6/9/14	307,245	320,319
Duke Energy Carolinas-5.75%, 11/15/13	69,585	71,109
Du Pont EI De Nemou-5.875%, 1/15/14	108,053	110,464
Deutsche Telecom-4.875%, 7/8/14	201,846	209,730
Dell Inc-5.625%, 4/15/14	210,803	217,888
Daimler Chrysler-6.5%, 11/15/13	155,334	164,436
Credit Suisse New York-5.5%, 5/1/14	747,394	786,770
Credit Suisse FB USA-5.5%, 8/15/13	102,686	108,635
Credit Suisse FB USA-5.125%, 1/15/14	201,297	213,512
Conoco Phillips-4.75%, 2/12/14	205,945	214,738
Coca Cola HBC Fin-5.125%, 9/17/13	102,517	107,102
CME Group Inc-5.75%. 2/15/14	517,482	546,885
Charles Schwab-4.95%, 6/1/14	201,218	210,986
Caterpillar Fin Ser Corp-6.2%, 9/30/13	105,568	111,434
Caterpillar Fin Ser Corp-6.125%, 2/17/14	922,757	1,005,786
Carolina Power & Light-5.125%, 9/15/13	105,712	107,033
BP Capital Markets-5.25%, 11/7/13	215,485	217,846
Berkshire Hathaway Inc-4.625%, 10/15/13	205,323	213,218
Bellsouth Corp-5.2%, 9/15/14	103,111	107,099
Bear Stearns Co-5.7%, 11/15/14	407,827	440,132
BB&T Corp-5.7%, 4/30/14	301,054	324,735
Barclays Bank-5.2%, 7/10/14	508,631	530,005
Bank of New York-4.95%, 11/1/12	204,685	215,396
Bank of America Corp-4.9%, 5/1/13	198,312	207,342
Bank of America Corp-5.125%, 11/15/14	414,175	414,716
AT&T Corp-6.7%, 11/15/13	108,285	112,825
AT&T Corp-4.85%, 2/15/14	202,343	212,659
American Express Co-7.25%, 5/20/14	420,198	451,348
Allstate Life Global-5.375%,4/13/13	605,229	640,482
Wyeth Notes-5.5%,3/15/13	104,389	108,729
Wells Fargo Co-4.375%,1/13/13	1,179,395	1,246,416
United Healthcare Group-5.25%,3/15/11	203,017	207,242
Travelers Cos-5.375%,6/15/12	201,105	211,742
SBC Communications-5.875%,8/15/12	78,004	81,877
SBC Communications-5.875%,2/1/12	206,274	216,280
Royal Bank of Scotland-5%,11/12/13	203,154	180,290
Royal Bank of Canada-5.65%,7/20/11	311,213	320,307
Morgan Stanley-5.625%,1/9/12	708,062	738,724
Key Bank NA-7%,2/1/11	205,391	207,696
Household Financial-6.375%,11/27/12	205,752	217,806
Hartford Life Global-5.2%,2/15/11	176,874	178,469
Goldman Sachs Group-5.7%,9/1/12	406,403	430,264
Goldman Sachs Group-6.6%,1/15/12	95,500	108,714
GE Capital Corp-5.45%,1/15/13	983,517	1,063,090
Credit Suisse-5%,5/15/13	496,445	534,400
Credit Suisse FB USA-6.5%,1/15/12	207,917	217,638
Credit Suisse FB USA-5.5%,8/16/11	150,962	159,361
Costco Wholesale Corp-5.3%,3/15/12	205,686	215,752
Consolidated Edison-4.875%,2/1/13	309,476	319,686
Citigroup-5.1%, 9/29/11	200,006	206,766
Citigroup Global Markets-6%,2/21/12	75,341	78,122
BankAmerica Corp-4.9%,5/1/13		
BankAmerica Corp-4.875%,1/15/13	99,030	103,996
BankAmerica Corp-4.875%,9/15/12	249,054	261,960
Banc One Corp-5.25%,1/30/13	505,239	530,230
At&T Corp-7.3%,11/15/11	210,859	220,214
Anheuser Busch-4.375%,1/15/13	195,394	204,644
American Int'l Group-5.375%,10/15/11	205,295	198,624
American Express-5.875%,5/2/13	502,943	536,580
American Express-5.55%.10/17/12	253,161	267,357
Wal-Mart Stores-4.125%,2/15/11	244,372	258,963
Target Corp Global Notes-5.875%,3/11/12	362,322	379,232
Public Service Elec & Gas	406,729	429,068
National Rual Utils Coop-5.7%,1/15/10	170,085	170,224
National City Bank-4.5%,3/15/10	149,453	150,920
Merrill Lynch Co-4.79%,8/4/10	99,739	102,067
Merrill Lynch Co-4.25%,2/8/10	98,891	100,321
Merck & Co-5.125%,11/15/11	272,969	288,349
MBNA Corp Sr Notes-5%,5/4/10	200,100	202,192
Marshall & Ilsley-4.4%,3/15/10	299,599	299,715
JP Morgan Chase-4.6%,1/17/11	99,883	103,458
John Deere Cap Corp-4.125%,1/15/10	197,712	200,178
IBM Corp-4.75%,11/29/12	153,061	161,151
Hershey Co Notes-5.3%,9/1/11	251,728	264,838
Hartford Fin'l Services-5.25%,10/15/11	718,883	730,670
Goldman Sachs Group-5.450%,11/1/12	202,448	215,036
GE Capital Corp-4.15%,6/15/11	64,763	66,039
GE Capital Corp-4.875%,10/21/10	400,211	413,660
GE Capital Corp-5.25%,10/27/09		
FPL Group Capital-5.625%,9/1/11	1,021,457	1,063,730
Deutsch Bank AG London-5.375%,10/12/12	1,522,896	1,619,340
Credit Suisse FB USA-4.125%,1/15/10	196,328	200,176
Conoco Phillips-5.5%,4/15/13	515,067	542,975
Conoco Phillips-4.75%,10/15/12	1,214,567	1,285,848
Citigroup Inc-5.3%,10/17/12	202,169	208,348
Citigroup Inc-4.125%,2/22/10	148,200	150,546
Chubb Corp-6%,11/15/11	308,094	322,299
Caterpillar Fin Serv Corp-4.15%,1/15/10	270,798	275,228
Berkshire Hathaway Notes-4.75%,5/15/12	1,313,133	1,385,891
Bear Stearns Co Notes-5.35%,2/1/12	299,281	318,771
Astrazeneca PLC Global-5.4%,9/15/12	613,846	655,410
Associates Corp-7.95%,2/15/10	140,568	140,176
Amer Gen'l Fin'l-7.5%,8/11/10	304,860	306,330
American Express-5.25%,11/21/11	201,492	206,970
Allstate Life Global-4.25%,2/26/10	98,025	100,452
Aetna Inc Notes-5.75%,6/15/11	153,505	157,306
Abbott Labs-5.6%,5/15/11	203,458	212,126
Abbott Labs-3.75%,3/15/11	599,303	619,830
WM Wrigley Notes-4.3%, 7/15/10	485,610	504,805
Wells Fargo Global-4.875%, 1/12/11	299,859	310,830
Wal-Mart Stores-4.75%, 8/15/10	247,418	257,035
US Bancorp Notes-4.5%, 07/29/10	247,967	256,183
United Healthcare-4.125%, 8/15/09		
Toyota Motor Credit-4.25%, 3/15/10	1,229,865	1,264,500
Royal Bank of Scotland-6.4%, 4/1/09		
Pfizer Inc-3.3%, 3/2/09		
Merrill Lynch-4.5%, 11/4/10	394,480	411,200
Merrill Lynch-4.75%, 11/20/09		
IBM Corp-5.375%, 2/1/09		
HSBC Finance Corp-5.25%, 1/14/11	903,515	931,770
Home Depot Global-4.625%, 8/15/10	983,995	1,023,710
Goldman Sachs Group-5%, 1/15/11	299,481	311,649
DNA Finance Corp-4.4%, 7/15/10	344,696	357,203
GE Capital Corp-4.125%, 9/1/09		
Du Pont EI De Nemou-4.125%, 4/30/10	534,418	557,387
Cisco Systems-5.25%, 2/22/11	502,517	524,665
Berkshire Hathway-4.125%, 1/15/10	1,173,542	1,181,144
BellSouth Communications-4.2%, 9/15/09		
American Express Co-5%, 12/2/10	199,056	206,446
Abbott Labs-3.5%, 2/17/09		
Wal Mart Stores-4%, 1/15/10	1,147,730	1,176,069
Merrill Lynch-4.125%, 1/15/09		
JP Morgan Chase-4.5%,1/15/12	403,308	419,196
JP Morgan Chase-3.5%, 3/15/09		
JP Morgan Chase-4.5%, 11/15/10	50,211	51,687
HSBC Bank USA-3.875%, 9/15/09		
Ginnie Mae-4.5%, 7/20/32		
GE Capital-4%, 2/17/09		
GE Capital-3.125%, 4/1/09		
Citigroup Global-3.625%, 2/9/09		
Credit Suisse-3.875%, 1/15/09		
Citigroup Global-4.25%, 7/29/09		
Allstate Life Global-4.5%, 5/29/09		
American Express-4.375%, 7/30/09		
Wells Fargo Global Notes-4.2%, 1/15/10	497,849	500,435
Wells Fargo Global Notes-3.125%, 4/1/09		
Suntrust Banks Inc-4.25%, 10/15/09		
Morgan Stanley-4.25%, 5/15/10	345,083	354,302
Morgan Stanley-4%, 1/15/10	473,190	475,347
Merrill Lynch Co-4.125%, 9/10/09		
JP Morgan Chase-3.8%, 10/2/09		
Int'l Lease Fi Corp Global-4.75%, 7/1/09		
Household Fin'l Corp-4.125%, 11/16/09		
Goldman Sachs Group-3.875%, 1/15/09		
GE Capital Corp Global-4.25%, 12/1/10	559,215	593,647
GE Capital Corp Global-3.75%, 12/15/09		
GE Capital Corp Global-4.625%, 9/15/09		
GE Capital Corp Global-3.875%, 7/15/09		
GE Capital Corp Global-3.25%, 6/15/09		
Credit Suisse FB USA-4.7%, 6/1/09		
Berkshire Hathway-4.2%, 12/15/10	98,940	103,528
Bear Stearns Global-3.250%, 3/25/09		
Bank of America-4.375%, 12/1/10	301,143	309,708
Bank of America-4.250%, 10/01/10	200,728	205,112
Bank of America-3.375%, 2/17/09		
Amer Gen'l Fin'l-4.625%, 5/15/09		

TY 2009 Investments Corporate
Stock Schedule

Name: The Brunckhorst Foundation
EIN: 23-7000850
Software ID: 09000047
Software Version: 2009v1.3

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Met Life-6.5%, Ser B Pfd	276,491	288,120
Procter & Gamble	58,106	60,630
Oneok Partners LP	55,780	62,300
Morgan Stanley Cap Tr-6.45%	102,862	107,250
Merck & Co	50,614	54,810
Home Depot Inc	55,311	57,860
DU Pont EI Nemours	62,148	67,340
CSX Corp	53,950	58,188
Citigroup Inc	78,750	82,750
Caterpillar Inc	52,531	56,990
BP PLC	62,569	69,564
AT&T Inc	53,908	56,060
Apple Inc	57,967	63,220
Wells Fargo Cap-8.625%-Pfd		
Bank of America-8.625%-Pfd	250,000	245,400
JP Morgan Chase Cap-8%	204,615	214,880
JP Morgan Chase-8.625%-Pfd		
ING Group-8.5%-PFD	284,367	263,040
ING Group-7.375%-PFD	391,299	354,420
HSBC Holdings PLC-8.125%-Pfd	323,934	339,300
GE Capital Corp-6%-Pfd		
Deutsch Bank-8.05%-Pfd	127,400	125,950
Deutsche Bank-7.6%-PFD	250,000	237,300
Credit Suisse-7.9%-PFD	375,000	385,200
Citigroup-8.5%-Pfd		
Barclays Bank PLC-8.125%-Pfd	330,484	348,040
Bank of America-8.2%-Pfd	421,474	435,060
AT&T-6.375%-Pfd		
Allianz SE-8.375%-Pfd	373,918	369,375

TY 2009 Investments - Other Schedule

Name: The Brunckhorst Foundation

EIN: 23-7000850

Software ID: 09000047

Software Version: 2009v1.3

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Columbia Marsico 21st Century	AT COST	85,000	65,830
Corts Tr V-IBM 6.4%,12/1/2096	AT COST		

TY 2009 Other Expenses Schedule

Name: The Brunckhorst Foundation

EIN: 23-7000850

Software ID: 09000047

Software Version: 2009v1.3

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Service Charges	275	275		
Public Notice	120			120
Filing Fees	1,500			1,500

TY 2009 Taxes Schedule

Name: The Brunckhorst Foundation

EIN: 23-7000850

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax -'09	28,122			