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Form **990-PF**

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

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service

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

2009

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

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

WOLFE ASSOCIATES

A Employer identification number

23-7303111

Number and street (or P O box number if mail is not delivered to street address)

34 SOUTH THIRD STREET

Room/suite

B Telephone number (see page 10 of the instructions)

614-461-5211

City or town, state, and ZIP code

COLUMBUS, OHIO 43215C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 15,061,693**J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)**Part I**

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

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	63,000	SCHEDULE 1	
	2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B			
	3	Interest on savings and temporary cash investments	286,618	286,618	
	4	Dividends and interest from securities	29,958	29,958	
	5a	Gross rents			
	b	Net rental income or (loss)			
	6a	Net gain or (loss) from sale of assets not on line 10	90,462		
	b	Gross sales price for all assets on line 6a 3,208,408			
	7	Capital gain net income (from Part IV, line 2)		90,462	
	8	Net short-term capital gain			
	9	Income modifications			
	10a	Gross sales less returns and allowances			
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	470,038	407,038		
Operating and Administrative Expenses	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)	41,385	41,385	SCHEDULE 1
	17	Interest			
	18	Taxes (attach schedule) (see page 14 of the instructions)	3,200		SCHEDULE 1
	19	Depreciation (attach schedule) and depletion			
	20	Occupancy			
	21	Travel, conferences, and meetings			
	22	Printing and publications			
	23	Other expenses (attach schedule)	200		SCHEDULE 1
	24	Total operating and administrative expenses. Add lines 13 through 23	44,785	41,385	
	25	Contributions, gifts, grants paid	1,995,221		1,995,221
26	Total expenses and disbursements. Add lines 24 and 25	2,040,006	41,385	1,995,221	
27	Subtract line 26 from line 12.				
a	Excess of revenue over expenses and disbursements	(1,569,968)			
b	Net investment income (if negative, enter -0-)		365,653		
c	Adjusted net income (if negative, enter -0-)				

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Cat No 11289X

Form **990-PF** (2009)

ENVELOPE
POSTMARK DATE
JUL 02 2010

SCANNED JUL 10 2010

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23

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	60,949	31,324	31,324
	2 Savings and temporary cash investments	4,264,926	1,281,657	1,281,657
	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 16 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			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule) <i>SCH 2</i>	162,135	162,135	179,877
	c Investments—corporate bonds (attach schedule) <i>SCH 2</i>	12,080,200	13,523,126	13,568,835
	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) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	16,568,210	14,998,242	15,061,693
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)			
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 type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	16,568,210	14,998,242	
	30 Total net assets or fund balances (see page 17 of the instructions)	16,568,210	14,998,242	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	16,568,210	14,998,242	

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	16,568,210
2 Enter amount from Part I, line 27a	2	(1,569,968)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	14,998,242
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	14,998,242

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 100,000 FANNIE MAE	P	VAR	3/26/09
b 8,056,048 FIFTH THIRD SHORT TERM BOND FUND	P	VAR	8/28/09
c 2,635,000 VARIOUS	P	MAR-MAY 09	9/15/09
d 150,000 US TREASURY	P	9/18/09	12/23/09
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 102,739		98,262	4,477
b 75,405		78,400	(2,995)
c 2,855,079		2,764,765	90,314
d 175,185		176,519	(1,334)
e			

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
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	90,462
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.

(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	2,359,825	18,006,028	.1311
2007	2,267,223	19,490,817	.1163
2006	2,391,480	19,799,738	.1208
2005	1,357,563	15,567,001	.0872
2004	1,436,940	14,336,402	.1002

2 Total of line 1, column (d)	2	.5556
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	.1111
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	16,060,999
5 Multiply line 4 by line 3	5	1,784,377
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,657
7 Add lines 5 and 6	7	1,788,034
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.	8	1,995,221

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <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		3,657
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		3,657
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		3,657
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	11,331	
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	11,331	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	7,674	
11	Enter the amount of line 10 to be. Credited to 2010 estimated tax Refunded	11	0	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		✓
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)? <i>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.</i>		✓
c Did the foundation file Form 1120-POL for this year?		
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ <u>NONE</u> (2) On foundation managers. ► \$ <u>NONE</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ <u>NONE</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		✓
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? <i>If "Yes," attach a conformed copy of the changes.</i>		✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		✓
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?	✓	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	✓	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► <u>OHIO</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	✓	
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)? <i>If "Yes," complete Part XIV</i>		✓
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		✓

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		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
Website address ▶				
14	The books are in care of ▶ SHERRY L LEWIS	Telephone no. ▶	614-461-5211	
	Located at ▶ 34 SOUTH THIRD STREET COLUMBUS, OHIO	ZIP+4 ▶	43215-4201	
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)?	1b	
Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
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	✓
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	✓

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SCHEDULE 3				

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 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 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 NONE	
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 SCHEDULE 4	1a	16,190,805
b	Average of monthly cash balances SCHEDULE 4	1b	117,544
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	16,308,349
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	16,308,349
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	244,625
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,063,724
6	Minimum investment return. Enter 5% of line 5	6	803,186

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	803,186
2a	Tax on investment income for 2009 from Part VI, line 5 2a	3,657	
b	Income tax for 2009. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	3,657
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	799,529
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	799,529
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	799,529

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	1,995,221
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	1,995,221
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	3,657
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,991,564

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				799,529
2 Undistributed income, if any, as of the end of 2009:				
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 728,963				
b From 2005 591,990				
c From 2006 1,458,747				
d From 2007 1,312,673				
e From 2008 1,466,313				
f Total of lines 3a through e	5,558,686			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 1,995,221				
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				799,529
e Remaining amount distributed out of corpus	1,195,692			
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	6,754,378			
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)	728,963			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	6,025,415			
10 Analysis of line 9:				
a Excess from 2005 591,990				
b Excess from 2006 1,458,747				
c Excess from 2007 1,312,673				
d Excess from 2008 1,466,313				
e Excess from 2009 1,195,692				

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter $\frac{2}{3}$ 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 foundation had \$5,000 or more in assets at any time during the year—see page 28 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).)

N/A

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

N/A

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:

RITA J WOLFE 34 SOUTH THIRD STREET COLUMBUS, OH 43215 614-460-3782

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

Cover letter w/brief summary of purpose/request, amount requested, IRS exemption letter, financial statements, copy of most recent 990

c Any submission deadlines.

NONE

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

Health & Medicine, Religion, Education, Culture, Community Services, Youth Skills Development, Business

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SCHEDULE 5				
Total			▶	3a
b <i>Approved for future payment</i> SCHEDULE 6				
Total			▶	3b

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

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			14	286,618	
4	Dividends and interest from securities			14	29,958	
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	90,462	
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)				407,038	
13	Total. Add line 12, columns (b), (d), and (e)				13	407,038

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

[illegible]

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part I, Line 1

Contributions, gifts, grants, etc. received:

Memorial Tournament	\$ 60,000
Snead Foundation	\$ 3,000
	<u>\$ 63,000</u>

Part I, Line 16c

Other professional fees

Investment services	<u>\$ 41,385</u>
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Part I, Line 18

Taxes

Excise Taxes Paid on Investment Income	<u>\$ 3,200</u>
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Part I, Line 23

Other Expenses

State Filing Fee	<u>\$ 200</u>
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Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part II, Line 10b
Investments - Corporate Stock

Shares	Stock	Cost	Market Value
PNC		\$ 162,135	\$ 179,877

Part II, Line 10c
Investments - Corporate Bonds

	Cost	Market Value
Abbott Laboratories	110,460	109,068
Allstate Corp	80,579	79,637
American Express	81,772	83,137
American Express	106,786	107,488
AT&T	191,399	193,967
Bank of America	434,263	433,302
Bank of America	80,209	81,380
Bank of NY	95,287	95,500
Bank of NY	16,429	16,458
Bank of NY	66,661	66,027
Barclays	108,975	109,224
Berkshire Hathaway	1,017,770	1,056,414
Berkshire Hathaway	16,185	16,138
Boeing Co	143,109	142,476
Bottling Group	191,477	192,056
BP Capital	103,196	102,741
Centerpoint Energy	265,883	270,063
Coca Cola	204,877	201,634
Comerica Inc	65,694	67,171
Comerica Inc	14,020	13,638
Conoco Funding Co	109,787	110,137
Deuts	91,885	92,431
Discover Card Master Trust	277,495	276,751
Florida Power & Light	177,071	177,998
General Electric	103,950	105,327
General Electric	451,727	450,849
General Electric	109,575	111,336
Goldman Sachs Group	105,027	107,438
Goldman Sachs Group	80,968	83,002
Honeywell	192,086	192,585
IBM	193,480	193,009
Johnson & Johnson	149,623	150,616
JP Morgan Chase	105,017	105,579
JP Morgan Chase	82,532	83,448
Kimberly Clark	178,360	175,784
Massachusetts RRB	12,540	12,696
Merrill Lynch & Co	105,543	108,214
Methlife Inc	81,080	81,158
Methlife Inc	109,562	111,672
Morgan Stanley	103,633	104,461
National Rural Util Corp	106,160	107,790
National Rural Util Corp	22,004	22,198
National Rural Util Corp	90,197	90,544
NELNE	102,750	104,720
Northern States Pwr-Minn	219,456	217,293
Nthn Trust Corp	68,383	69,109
Nucor Corp	151,537	153,386

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part II, Line 10c (Continued)
Investments - Corporate Bonds

PECO Energy Co	228,756	226,578
PNC Bank	92,338	90,703
PNC Funding Corp	87,162	86,882
Principal Life	110,575	111,905
Proctor & Gamble	36,817	36,924
Proctor & Gamble	151,970	150,668
PSE & G Trans	115,762	114,216
SLM Student Loan	247,729	248,590
State Street Bank	84,704	82,514
Suntrust Banks	84,201	84,804
Target Corp	109,398	110,310
Target Corp	151,724	152,576
United Parcel Service	153,531	155,005
United Technologies	193,974	191,428
US Bank	82,052	82,766
Walgreen co	108,321	108,542
Walt Disney Co	36,521	36,747
Walt Disney Co	148,644	147,931
Wisc Energy Corp	219,453	221,263
<i>GOVERNMENT SECURITIES</i>		
Federal National Mortgage Association	293,979	292,874
Federal National Mortgage Association	830,171	823,057
Federal National Mortgage Association	215,250	212,233
FHLMC	272,850	276,251
US Treasury	1,072,890	1,075,382
US Treasury	1,417,892	1,411,635
	<u>13,523,126</u>	<u>13,568,835</u>

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part VIII, Line 1

Officers, Directors, Trustees, Foundation Managers and their Compensation

Name and Address	Title and Avg. Hours per Week	Compensation	Contributions	Expense Account
John F. Wolfe 34 S. Third St., Columbus, OH 43215	Chairman/President/Trustee 2 hrs mo	0	0	0
Poe A. Timmons 34 S. Third St., Columbus, OH 43215	Vice President/Treasurer/Trustee 2 hrs mo	0	0	0
Nancy Wolfe Lane 5699 Bastille Place, Columbus, OH 43213	Vice President/Trustee 2 hrs mo	0	0	0
Sara Wolfe Perrini 7266 Landon Lane, New Albany, OH 43054	Vice President/Trustee 2 hrs mo	0	0	0
Rita J. Wolfe 34 S. Third St., Columbus, OH 43215	Vice President/Trustee 2 hrs mo	0	0	0
Michael J. Fiorile 34 S. Third St., Columbus, OH 43215	Vice President/Trustee 2 hrs mo	0	0	0
Katherine I. Wolfe 34 S. Third St., Columbus, OH 43215	Vice President/Trustee 2 hrs mo	0	0	0
Sherry L. Lewis 34 S. Third St., Columbus, OH 43215	Secretary 2 hrs mo	0	0	0
Michael F. Curtin 34 S. Third St., Columbus, OH 43215	Vice President/Trustee 2 hrs mo	0	0	0

Wolfe Associates, Inc.**23-7303111****Year Ended 12/31/09**

Part X, Line 1a

Average Monthly Fair Market Value of Securities

Month	Beginning Balance	Ending Balance	Total	Average
January-09	16,510,934	16,381,336	32,892,270	16,446,135
February	16,381,336	16,405,955	32,787,291	16,393,646
March	16,405,955	16,348,173	32,754,128	16,377,064
April	16,348,173	16,323,030	32,671,203	16,335,602
May	16,323,030	16,351,641	32,674,671	16,337,336
June	16,351,641	16,294,364	32,646,005	16,323,003
July	16,294,364	16,259,240	32,553,604	16,276,802
August	16,259,240	16,374,804	32,634,044	16,317,022
September	16,374,804	16,255,875	32,630,679	16,315,340
October	16,255,875	16,225,128	32,481,003	16,240,502
November	16,225,128	15,299,458	31,524,586	15,762,293
December	15,299,458	15,030,369	30,329,827	15,164,914
Total				194,289,656

Monthly Average

16,190,805

Part X, Line 1b

Average of Monthly Cash Balances

Month	Beginning Balance	Ending Balance	Total	Average
January-09	60,949	14,531	75,480	37,740
February	14,531	8,531	23,063	11,531
March	8,531	14,781	23,313	11,656
April	14,781	14,350	29,131	14,566
May	14,350	17,700	32,050	16,025
June	17,700	15,000	32,700	16,350
July	15,000	20,044	35,044	17,522
August	20,044	11,844	31,889	15,944
September	11,844	11,894	23,739	11,869
October	11,894	14,795	26,689	13,345
November	14,795	1,220,924	1,235,719	617,859
December	1,220,924	31,324	1,252,248	626,124
Total				1,410,532

Monthly Average

117,544

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part XV, Line 3a
Grants and Contributions Paid During the Year

1 *Health and Medicine*

AMERICAN CANCER SOCIETY 870 MICHIGAN AVE COLUMBUS, OH	\$ 250
ARTHUR JAMES CANCER HOSPITAL (DONATION) 300 W 10TH AVE COLUMBUS, OH 43210	\$ 800
ARTHUR JAMES CANCER HOSPITAL (MG) 300 W 10TH AVE COLUMBUS, OH 43210	\$ 10,000
CENTRAL OHIO INTL DYSLEXIA ASSOC (DONATION) 5787 CHIDDINGSTONE LN WESTERVILLE, OH 43072	\$ 1,000
COLUMBUS BLUE JACKET'S FOUNDATION (DONATION) 200 W NATIONWIDE BLVD COLUMBUS, OH 43215	\$ 2,000
HOMEREACH HOSPICE DELAWARE (DONATION) 561 W CENTRAL AVE DELAWARE, OH 43015	\$ 150
HOSPICE AT MOUNT CARMEL (DONATION) 6001 EAST BROAD ST COLUMBUS, OH 43213	\$ 200
KOBACKER HOUSE (DONATION) 3595 OLENTANGY RIVER RD COLUMBUS, OH 43214	\$ 150
KOMEN RACE FOR THE CURE (MG) 855 GRANDVIEW AVE STE 250 COLUMBUS, OH 43215	\$ 750
KOMEN RACE FOR THE CURE (MG) 855 GRANDVIEW AVE STE 250 COLUMBUS, OH 43215	\$ 750
LIFECARE ALLIANCE (COMMITMENT) 1699 WEST MOUND STREET COLUMBUS, OH 43223	\$ 30,000
MOUNT CARMEL FOUNDATION (COMMITMENT) 793 W STATE ST COLUMBUS, OH 43222	\$ 5,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (PLEDGE) P O BOX 16810 COLUMBUS, OH 43216	\$ 10,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (COMMITMENT) P O BOX 16810 COLUMBUS, OH 43216	\$ 600,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (IN MEMORY) P O BOX 16810 COLUMBUS, OH 43216	\$ 200
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 500
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 500
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 500
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 1,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 2,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 3,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 3,500
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 5,000
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 1,500
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 1,000

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part XV, Line 3a

Grants and Contributions Paid During the Year

1 Health and Medicine

NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION (MG) P O BOX 16810 COLUMBUS, OH 43216	\$ 1,000
PREGNANCY DECISION HEALTH CENTERS (MG) 665 E DUBLIN GRANVILLE RD #120 COLUMBUS, OH 43229	\$ 1,000
PREVENT BLINDNESS OHIO (MG) 1500 W THIRD AVE #200 COLUMBUS, OH 43212	\$ 1,000
PREVENT BLINDNESS OHIO (MG) 1500 W THIRD AVE #200 COLUMBUS, OH 43212	\$ 1,000
RILEY'S CHILDREN'S HOSPITAL (PLEDGE) 30 S MERIDIAN ST SUITE 200 INDIANAPOLIS, IN 46204-3509	\$ 10,000
RILEY'S CHILDREN'S HOSPITAL (MG) 30 S MERIDIAN ST SUITE 200 INDIANAPOLIS, IN 46204-3509	\$ 2,500
RONALD MCDONALD HOUSE 555 CHILDREN'S DR W COLUMBUS, OH 43205	\$ 30,000
 TOTAL HEALTH & MEDICINE	 <u>\$ 726,250</u>

Wolfe Associates, Inc.

23-7303111

Year Ended 12/31/09

Part XV, Line 3a

Grants and Contributions Paid During the Year

2.RELIGION

GIDEON'S INTERNATIONAL (DONATION)	\$	250
PO BOX 140800 NASHVILLE, TN 37214		

LUTHERAN OUTDOOR MINISTRIES IN OHIO (MG)	\$	500
863 EASTWIND DR WESTERVILLE, OH 43081		

LUTHERN SOCIAL SERVICES (MG)	\$	500
750 E BROAD ST COLUMBUS, OH 43215		

PONTIFICAL COLLEGE JOSEPHINUM (MG)	\$	1,250
7625 NORTH HIGH STREET COLUMBUS, OH 43235-1498		

TOTAL RELIGION	<u>\$</u>	<u>2,500</u>
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Part XV, Line 3a

Grants and Contributions Paid During the Year

3 *Education*

ASHLAND UNIVERSITY (SCHOLARSHIP) 1900 E DUBLIN GRANVILLE RD COLUMBUS, OH 43229	\$	3,000
BALDWIN-WALLACE COLLEGE (MG) 275 EASTLAND RD BERE A, OH 44017	\$	1,000
BISHOP HARTLEY HIGH SCHOOL (MG) 1285 ZETTLER RD COLUMBUS, OH 43227	\$	2,500
BISHOP READY HIGH SCHOOL (MG) 707 SALISBURY RD COLUMBUS, OH 43204	\$	500
BISHOP READY HIGH SCHOOL (MG) 707 SALISBURY RD COLUMBUS, OH 43204	\$	1,000
BISHOP WATTERSON HIGH SCHOOL (MG) 99 EAST COOKE RD COLUMBUS, OH 43214	\$	1,250
BUCKNELL UNIVERSITY (SCHOLARSHIP) 701 MOORE AVE LEWISBURG, PA 17837	\$	6,000
CASE WESTERN RESERVE (SCHOLARSHIP) 10900 EUCLID AVE CLEVELAND, OH 44106	\$	7,500
CASE WESTERN RESERVE (SCHOLARSHIP) 10900 EUCLID AVE CLEVELAND, OH 44106	\$	6,000
CASE WESTERN RESERVE (SCHOLARSHIP) 10900 EUCLID AVE CLEVELAND, OH 44106	\$	2,500
COLUMBIA UNIVERSITY (SCHOLARSHIP) 2960 BROADWAY NEW YORK, NY 10027	\$	7,500
THE COLUMBUS ACADEMY (MG) 4300 CHERRY BOTTOM RD GAHANNA, OH 43230	\$	2,500
THE COLUMBUS ACADEMY (MG) 4300 CHERRY BOTTOM RD GAHANNA, OH 43230	\$	3,500
COLUMBUS SCHOOL FOR GIRLS (MG) 56 SOUTH COLUMBIA AVE COLUMBUS, OH 43209	\$	2,500
COLUMBUS STATE COMMUNITY COLLEGE (COMMITMENT) 550 EAST SPRING ST COLUMBUS, OH 43215	\$	20,000
COLUMBUS STATE COMMUNITY COLLEGE (COMMITMENT) 550 EAST SPRING ST COLUMBUS, OH 43215	\$	50,000
EMORY UNIVERSITY (SCHOLARSHIP) 1525 CLIFTON RD ATLANTA, GA	\$	3,000
EVANS SCHOLARS FOUNDATION (COMMITMENT) 1 BRIAR RD GOLF, IL 60029	\$	20,000
FISHER COLLEGE OF BUSINESS (MG) OHIO STATE UNIVERSITY COLUMBUS, OHIO 43210	\$	2,500
HARVARD COLLEGE (SCHOLARSHIP) MASSACHUSETTS HALL, CAMBRIDGE, MA 02138	\$	6,000
HORATIO ALGER AWARDS (DONATION) 99 CANAL CENTER PLAZA STE 320 ALEXANDRIA, VA 22314	\$	5,000

Part XV, Line 3a

Grants and Contributions Paid During the Year

3 Education

KENTUCKY STATE UNIVERSITY (SCHOLARSHIP) 400 EAST MAIN ST FRANKFORT, KY 40601	\$ 2,500
KIDSOHIO ORG 22 EAST GAY ST STE 600 COLUMBUS, OH 43215	\$ 25,000
KIPP JOURNEY ACADEMY (MG) 1406 MYRTLE AVE COLUMBUS, OH 43211	\$ 1,000
METRO EARLY COLLEGE HIGH SCHOOL (DONATION) 1929 KENNY RD COLUMBUS, OH 43210	\$ 500
NORTHWESTERN UNIVERSITY (SCHOLARSHIP) 633 CLARK ST EVANSTON, IL 60208	\$ 3,000
OHIO DOMINICAN UNIVERSITY (COMMITMENT) 1216 SUNBURY RD COLUMBUS, OH 43219	\$ 50,000
OHIO DOMINICAN UNIVERSITY (MG) 1216 SUNBURY RD COLUMBUS, OH 43219	\$ 1,000
OHIO FOUNDATION OF INDEPENDENT COLLEGES (COMMITMENT) 250 E BROAD ST STE 1700 COLUMBUS, OH 43215	\$ 5,000
OHIO FOUNDATION OF INDEPENDENT COLLEGES (DONATION) 250 E BROAD ST STE 1700 COLUMBUS, OH 43215	\$ 5,000
THE OHIO STATE UNIVERSITY (SCHOLARSHIP) ST JOHN ARENA #225 410 WOODY HAYES DR COLUMBUS, OH 43210	\$ 2,500
THE OHIO STATE UNIVERSITY (SCHOLARSHIP) ST JOHN ARENA #225 410 WOODY HAYES DR COLUMBUS, OH 43210	\$ 2,500
THE OHIO STATE UNIVERSITY (SCHOLARSHIP) ST JOHN ARENA #225 410 WOODY HAYES DR COLUMBUS, OH 43210	\$ 2,500
THE OHIO STATE UNIVERSITY (SCHOLARSHIP) ST JOHN ARENA #225 410 WOODY HAYES DR COLUMBUS, OH 43210	\$ 2,500
THE OHIO STATE UNIVERSITY (SCHOLARSHIP) ST JOHN ARENA #225 410 WOODY HAYES DR COLUMBUS, OH 43210	\$ 3,000
THE OHIO STATE UNIVERSITY (MG) ST JOHN ARENA #225 410 WOODY HAYES DR COLUMBUS, OH 43210	\$ 1,500
OHIO WESLEYAN UNIVERSITY (MG) 61 S SANDUSKY ST DELAWARE, OH 43015	\$ 1,250
POWER OF THE PEN (DONATION) PO BOX 442 RICHFIELD, OH 44286	\$ 1,000
PURDUE UNIVERSITY (SCHOLARSHIP) WEST LAFAYETTE, IN 47907	\$ 2,500
TOM FENNESSY BACK TO SCHOOL (DONATION) 2416 HUNTMASTER LN GROVE CITY, OH 43123	\$ 1,000
TRINITY ELEMENTARY SCHOOL (MG) 1381 IDA AVENUE COLUMBUS, OH 43212	\$ 3,000
TRINITY ELEMENTARY SCHOOL (MG) 1381 IDA AVENUE COLUMBUS, OH 43212	\$ 2,500

Part XV, Line 3a

Grants and Contributions Paid During the Year

3 *Education*

UNIVERSITY OF CENTRAL FLORIDA (SCHOLARSHIP) 4000 CENTRAL FLORIDA BLVD ORLANDO, FL 32816	\$	4,000
UNIVERSITY OF CINCINNATI (SCHOLARSHIP) 2600 CLIFTON AVE, CINCINNATI, OH 45221	\$	3,000
UNIVERSITY OF KENTUCKY (SCHOLARSHIP) LEXINGTON, KY 40506	\$	3,000
UNIVERSITY OF MARYLAND (SCHOLARSHIP) COLLEGE PARK, MD 20742	\$	4,000
UNIVERSITY OF NOTRE DAME (MG) 400 MAIN BUILDING NOTRE DAME, IN 46556	\$	10,000
TOTAL EDUCATION	\$	<u>296,500</u>

Part XV, Line 3a
Grants and Contributions Paid During the Year

4 *Culture & Environment*

BALLET MET COLUMBUS (COMMITMENT) 322 MOUNT VERNON AVE COLUMBUS, OH 43215	\$	10,000
COLUMBUS ASSOCIATION FOR PERFORMING ARTS (COMMITMENT) 55 E STATE ST COLUMBUS, OH 43215	\$	15,000
COLUMBUS ASSOCIATION FOR PERFORMING ARTS (COMMITMENT) 55 E STATE ST COLUMBUS, OH 43215	\$	25,000
COLUMBUS ASSOCIATION FOR PERFORMING ARTS (COMMITMENT) 55 E STATE ST COLUMBUS, OH 43215	\$	100,000
COLUMBUS SYMPHONY ORCHESTRA (MG) 55 E STATE ST COLUMBUS, OH 43215	\$	500
FRANKLIN PARK CONSERVATORY (DONATION) 1777 E BROAD ST COLUMBUS, OH 43203	\$	25,000
FRANKLIN PARK CONSERVATORY (MG) 1777 E BROAD ST COLUMBUS, OH 43203	\$	25,000
FRANKLIN PARK CONSERVATORY (MG) 1777 E BROAD ST COLUMBUS, OH 43203	\$	1,000
FRANKLIN PARK CONSERVATORY (MG) 1777 E BROAD ST COLUMBUS, OH 43203	\$	1,000
JAZZ ARTS GROUP (DONATION) 939 N HIGH ST COLUMBUS, OH 43201	\$	5,000
WEXNER CENTER FOUNDATION (DONATION) 22 E 16TH AVE COLUMBUS, OH 43201	\$	25,000
TOTAL CULTURE & ENVIRONMENT	\$	<u>232,500</u>

Part XV, Line 3a
Grants and Contributions Paid During the Year

5 Community Services

A KID AGAIN (MG) 6863 OAK CREEK DR COLUMBUS, OH 43229	\$ 2,500
A KID AGAIN (MG) 6863 OAK CREEK DR COLUMBUS, OH 43229	\$ 2,000
AMERICAN CANCER SOCIETY (DONATION) 870 MICHIGAN AVE COLUMBUS, OH 43215	\$ 100
AMERICAN LEGION AUXILLIARY UNIT 56 (DONATION) PO BOX.13 SANTA MARIA, CA 93456	\$ 500
CAPITOL CROSSROADS SID (DONATION) 20 E BROAD ST #100 COLUMBUS, OH 43215	\$ 1,000
CAPITOL CROSSROADS SID (COMMITMENT) 20 E BROAD ST #100 COLUMBUS, OH 43215	\$ 1,000
CENTER FOR LEADERSHIP DEVELOPMENT (DONATION) 3536 WASHINGTON BLVD INDIANAPOLIS, IN 46205	\$ 2,500
CENTER FOR LIFE & HOPE (MG) 665 E DUBLIN-GRANVILLE RD SUITE 200 COLUMBUS, OH 43229	\$ 1,000
THE COLUMBUS FOUNDATION (MG) 1234 E BROAD ST COLUMBUS, OH 43205	\$ 28,000
THE COLUMBUS FOUNDATION (MG) 1234 E BROAD ST COLUMBUS, OH 43205	\$ 15,000
COLUMBUS HOUSING PARTNERSHIP (DONATION) 562 E MAIN ST COLUMBUS, OH 43215	\$ 10,000
COLUMBUS LITERACY COUNCIL (DONATION) 195 NORTH GRANT AVE COLUMBUS, OH 43215	\$ 3,000
COLUMBUS METROPOLITAN LIBRARY (COMMITMENT) 96 S GRANT AVE COLUMBUS, OH 43215	\$ 40,000
COLUMBUS ZOO (IN MEMORY) 9990 RIVERSIDE DR POWELL, OH 43065	\$ 2,500
COMMUNITY SHELTER BOARD (DONATION) 111 LIBERTY ST #150 COLUMBUS, OH 43215	\$ 2,500
COSI COLUMBUS (DONATION) 333 W BROAD ST COLUMBUS, OH 43062	\$ 50,000
COSI COLUMBUS (MG) 333 W BROAD ST COLUMBUS, OH 43062	\$ 500
EMERALD CROSSINGS RESIDENT (DONATION) 7220 MUIRFIELD DR DUBLIN, OH 43017	\$ 500
GERMAN VILLAGE SOCIETY (MG) 588 S THIRD ST COLUMBUS, OH 43206	\$ 500
GERMAN VILLAGE SOCIETY FOUNDATION (MG) 588 S THIRD ST COLUMBUS, OH 43206	\$ 500

Part XV, Line 3a
Grants and Contributions Paid During the Year

5 *Community Services*

GOODWILL COLUMBUS (COMMITMENT) 1331 EDGEHILL RD COLUMBUS, OH 43212	\$ 15,000
GOODWILL COLUMBUS (MG) 1331 EDGEHILL RD COLUMBUS, OH 43212	\$ 500
HEARTLAND FILM FESTIVAL (COMMITMENT) 200 S MERIDIAN ST INDIANAPOLIS, IN 46225	\$ 2,500
JUST THINK INC (INVENTION CONVENTION) (DONATION) 7801 N CENTRAL DR LEWIS CENTER, OH 43035	\$ 10,000
THE KELTON HOUSE (MG) 586 E TOWN ST COLUMBUS, OH 43215	\$ 1,000
KIDS VOTING CENTRAL OHIO (DONATION) 60 E BROAD ST 3RD FL COLUMBUS, OH 43215	\$ 5,000
KIDSOHIO ORG (DONATION) 22 EAST GAY ST STE 600 COLUMBUS, OH 43215	\$ 35,000
KOMEN RACE FOR THE CURE (DONATION) 855 GRANDVIEW AVE STE 250 COLUMBUS, OH 43215	\$ 15,000
LAW ENFORCEMENT FOUNDATION (DONATION) 6277 RIVERSIDE DR #2N DUBLIN, OH 43017	\$ 2,500
LAW ENFORCEMENT FOUNDATION (DONATION) 6277 RIVERSIDE DR #2N DUBLIN, OH 43017	\$ 1,500
MID-OHIO FOOD BANK (COMMITMENT) 3960 BROOKHAM DR GROVE CITY, OH 43123	\$ 100,000
MID-OHIO FOOD BANK (DONATION) 3960 BROOKHAM DR GROVE CITY, OH 43123	\$ 100
MID-OHIO FOOD BANK (DONATION) 3960 BROOKHAM DR GROVE CITY, OH 43123	\$ 5,000
MID-OHIO FOOD BANK (MG) 3960 BROOKHAM DR GROVE CITY, OH 43123	\$ 500
OPERATION FEED (DONATION)	\$ 15,000
SAFETY NET OF THE COLUMBUS FOUNDATION (DONATION) 1234 E BROAD ST COLUMBUS, OH 43205	\$ 5,000
THE SALVATION ARMY (MG) 340 E. FULTON STREET, COLUMBUS, OH 43215	\$ 500
UNITED WAY OF CENTRAL INDIANA, INC. (COMMITMENT) 3901 NORTH MERIDIAN STREET INDIANAPOLIS IN 46208	\$ 22,718
UNITED WAY OF CENTRAL OHIO (COMMITMENT) 360 SOUTH THIRD STREET COLUMBUS, OH 43215	\$ 161,167
UNITED WAY OF FAIRFIELD COUNTY (MG) 115 S BROAD ST LANCASTER, OH 43030	\$ 500

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part XV, Line 3a
Grants and Contributions Paid During the Year

5 *Community Services*

VOICECORPS READING SERVICE (DONATION) 2955 WEST BROAD ST COLUMBUS, OH 43204	\$	12,500
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YMCA OF CENTRAL OHIO (DONATION) 40 W LONG ST COLUMBUS, OH 43215	\$	5,000
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YMCA OF CENTRAL OHIO (MG) 40 W LONG ST COLUMBUS, OH 43215	\$	500
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YMCA OF CENTRAL OHIO (MG) 40 W LONG ST COLUMBUS, OH 43215	\$	500
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TOTAL COMMUNITY SERVICES	\$	580,585
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Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part XV, Line 3a

Grants and Contributions Paid During the Year

6 *Youth Skills Development*

A KID AGAIN (MG)	\$	3,000
6863 OAK CREEK DR COLUMBUS, OH 43229		

BUCKEYE RANCH (MG)	\$	750
5665 HOOVER RD GROVE CITY, OH 43123		

OHIO DOMINICAN UNIVERSITY (MG)	\$	2,500
1216 SUNBURY RD COLUMBUS, OH 43219		

TOTAL YOUTH SKILLS DEVELOPMENT	<u>\$</u>	<u>6,250</u>
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Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part XV, Line 3a

Grants and Contributions Paid During the Year

7 Business Oriented

AUDOBON OHIO (COMMITMENT) 692 N HIGH ST COLUMBUS, OH 43215	\$ 50,000
CHRISTIAN LIFE CHURCH (DONATION) 665 LINVILLE RD HEATH, OH 43056	\$ 100
COLUMBUS FOUNDATION (MG) 1234 E BROAD ST COLUMBUS, OH 43215	\$ 15,000
COLUMBUS METROPOLITAN CLUB (MG) 100 E BROAD ST #2350 COLUMBUS, OH 43215	\$ 500
FRIENDS OF GREENLAWN (COMMITMENT) 229 E STATE ST COLUMBUS, OH 43215	\$ 30,000
GROUNDWORK GROUP (MG) 300 E BROAD ST COLUMBUS, OH 43215	\$ 1,500
INDY PARTNERSHIP (PLEDGE) 111 MONUMENT CIRCLE #1800 INDIANAPOLIS, IN 46204	\$ 3,000
INVENTION CONVENTION (MG) 7801 NORTH CENTRAL DR LEWIS CENTER, OH 43035	\$ 500
INVESTIGATIVE REPORTS AND EDITORS (DONATION) 141 NEFF ANNEX COLUMBIA, MO 65211	\$ 5,000
OHIO HISTORICAL SOCIETY (MG) 1982 VELMA AVE COLUMBUS, OH 43211	\$ 2,500
UNITED WAY OF CENTRAL INDIANA, INC. (COMMITMENT) 3901 NORTH MERIDIAN STREET INDIANAPOLIS IN 46208	\$ 6,618
UNITED WAY OF CENTRAL OHIO (COMMITMENT) 360 SOUTH THIRD STREET COLUMBUS, OH 43215	\$ 35,918
 TOTAL BUSINESS ORIENTED	 <u>\$ 150,636</u>
 GRAND TOTAL GRANTS AND CONTRIBUTIONS	 \$ 1,995,221

Wolfe Associates, Inc.
23-7303111
Year Ended 12/31/09

Part XV, Line 3b

Grants and Contributions Approved for Future Payment

	2010	2011	2012
AUDOBON CENTER/WHITTIER PENINSULA	\$50,000	\$50,000	
BALLETMET	\$10,000		
CHILDRENS HOSPITAL	\$600,000		
COLUMBUS ASSOCIATION FOR PERFORMING ARTS - LINCOLN THEATER	\$25,000		
COLUMBUS COLLEGE OF ART & DESIGN	\$100,000		
COLUMBUS METROPOLITAN LIBRARY	\$40,000		
COLUMBUS STATE COMMUNITY COLLEGE	\$20,000	\$20,000	\$20,000
GOODWILL COLUMBUS	\$15,000	\$15,000	
GREENLAWN CEMETERY	\$30,000	\$30,000	
LIFECARE ALLIANCE	\$30,000		
MARION COUNTY LIBRARY	\$2,000		
MID-OHIO FOOD BANK	\$100,000	\$100,000	\$100,000
OHIO DOMINICAN UNIVERSITY FOR THE STUDENT CENTER PROJECT	\$50,000		
OHIO STATE UNIVERSITY HAMILTON HOUSE CAPITAL CAMPAIGN/ EVANS SCHOLAR	\$20,000		
PEARL MARKET	\$1,000		
RONALD MCDONALD HOUSE CHARITIES OF CENTRAL OHIO	\$30,000		
TOTAL	\$1,123,000	\$215,000	\$120,000

THE COLUMBUS DISPATCH .
PROOF OF PUBLICATION

STATE OF OHIO, FRANKLIN COUNTY. SS:

Carla Daniel
Classified Operations Manager

The Columbus Dispatch, a newspaper published at
Columbus, Franklin County, Ohio, with a daily paid
Circulation of over 200,000 copies, personally appeared and
made oath that the notice of which a true copy is hereunto
attached was published in The Columbus Dispatch for 1 Time(s) on

May 14, 2010

and that the rate charged therefore is the same
as that charged for commercial advertising for
like services.

Carla Daniel

subscribed and Sworn on this 24th day of May
2010 as witness my hand and seal of office.

Veronica Hill

NOTARY PUBLIC - STATE OF OHIO

The annual foundation
report of Wolfe Associ-
ates, Inc is available at
its principal office for in-
spection during regular
business hours by any
citizen who requests it.
This report may be in-
spected by contacting
Sherry L. Lewis, 34
South Third Street, Co-
lumbus, OH 43215.



Veronica H. Hill
Notary Public, State of Ohio
My Commission Expires 11-05-2013