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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

2009

Department of the Treasury Internal Revenue Service Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2009, or tax year beginning , 2009, and ending G Check all that apply: Initial return Initial Return of a former public charity Final return Amended return Address change Name change Name of foundation Employer identification number Use the Serfco, Inc.

Number and street (or PO box number if mail is not delivered to street address) IRS label 23-7328056 Otherwise, Room/suite В Telephone number (see the instructions) print 14241 Midlothian Turnpike, #144 (804) 683-2139 or type State ZIP code See Specific City or town If exemption application is pending, check here Instructions. Midlothian VA 23113-6500 D 1 Foreign organizations, check here Check type of organization |X | Section 501(c)(3) exempt private foundation 2 Foreign organizations meeting the 85% test, check here and attach computation Section 4947(a)(1) nonexempt charitable trust | Other taxable private foundation If private foundation status was terminated Fair market value of all assets at end of year J Accounting method | X | Cash under section 507(b)(1)(A), check here (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination ► S (Part I, column (d) must be on cash basis) 630,689. under section 507(b)(1)(B), check here Part I Analysis of Revenue and (a) Revenue and (c) Adjusted net (b) Net investment (d) Disbursements Expenses (The total of amounts in expenses per books income ıncome for charitable columns (b), (c), and (d) may not necespurposes sarily equal the amounts in column (a) (cash basis only) (see the instructions)) 1 Contributions, gifts, grants, etc, received (att sch) 2 Ck X if the foundn is not req to att Sch B Interest on savings and temporary cash investments 12,281 12,281 12,281 1,271. 1,309. Dividends and interest from securities 1,271. 5a Gross rents b Net rental income or (loss) 6a Net gain/(loss) from sale of assets not on line 10 REVENUE **b** Gross sales price for all assets on line 6a 109 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 b Less Cost of ٥4 c Gross profit/(loss) (att sch) Other income (attach schedule) Miscellaneous 265 265 Total. Add (GE Through) 11 13,855. 13,661. 13,817. 13 Compensation of officers, direct Other employee salaries and wages Bension plans, employee ber 15 16 a Legal fees (attach schedule) ADMINISTRATIVE Accounting fees (attach sch)
Other out fees (attach sch) 216 650. 216 434. 370. 123. 123. 246. 2010 SZ-TRAMAO 17 Interest 148. 49. 49 98. 435. 290. Taxes (attach schedule)(see instr.) Excise Tax 145. 145. 19 Depreciation (attach sch) and depletion 20 Occupancy 21 Travel, conferences, and meetings Printing and publications 514. 171 171. 342. 23 Other expenses (attach schedule) See Line 23 Stmt 1,825. 696 696 1,128. Total operating and administrative expenses. Add lines 13 through 23 3,942 1,400 1,400 2,538. 41,412. Contributions, gifts, grants paid Total expenses and disbursements.

45,354

-31,499.

Add lines 24 and 25

and disbursements

Subtract line 26 from line 12: a Excess of revenue over expenses

b Net investment income (if negative, enter -0-)c Adjusted net income (if negative, enter -0-)

1,400

417.

12.

1,400

12,261

2,538.

Cash - ron-intrests bosoning 4, 263. 13, 407. 13, 407.	Part	11	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	
2 Savings and temporary cash investments 3 Accounts receivable Less allowance for doubtful accounts 4 Pledges receivable 6 Roards receivable 6 Roards receivable 7 Other notes and learn receivable (see the individuo) 7 Other notes and learn receivable (see the individuo) 8 Prepared expenses and deferred charges 10 Investments—a load state government 10 Investments—a load state government 10 Investments—a load state government 11 Investments—a load state government 12 Investments—a load state government 13 Investments—a load state government 14 Less accountable defensed (state strebule) 15 Investments—a load state government 16 Investments—a load state government 17 Investments—a load state government 18 Investments—a load state government 19 Pepade deprecation (states strebule) 10 Investments—a load state government 10 Investments—a load state government 10 Investments—a load state government 11 Investments—a load state government 12 Investments—a load state government 13 Investments—a load state government 14 Land, buildings, and sequepment basis * Less accumulated deprecation (states strebule) 15 Other assets (describe) 15 Other assets (describe) 15 Other assets (describe) 16 Total assets (to be completed by all files —) 16 Total assets (to be completed by all files —) 17 Total assets (to be completed by all files —) 18 Gents payable 19 Deterred revenue 10 Deterred revenue 10 Deterred revenue 10 Deterred revenue 11 Deterred revenue 12 Lear from offers, director, trustee, 8 other dequalified persons 14 Maragase and other note populo (states strebule) 15 Other assets (describe) 16 Total assets (so describe) 17 Total assets (so del lines 27 through 31 investments) 18 Complete lines 24 through 26 and lines 30 and 31 Land states and complete lines 24 through 26 and lines 30 and 31 Land states and complete lines 24 through 27 Land states and complete lines 24 through 28 and lines 30 and 31 Land states and complete lines 24 through 28 and lines 30 and 31 Land states and complete lines 24 through 28 and lines 30 a			(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
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2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 See Other Increases Stmt 6 29,197.	1	Tota	il net assets or fund balances at beginning of year — Part II, colun	nn (a), line 30 (must agree		660 415
3 281. 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) See Other Increases Stmt 4 629,197. 5	2		• •			
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5	_		•	Stmt		
5 Decreases not included in line 2 (itemize)	_		• • • • • • • • • • • • • • • • • • • •	<u> </u>		
` '						023,131.
	_		` ' ==========			629,197.

Lái	(14 Capital Gains and L	osses for rax off filtestifier	it income				
	(a) List and describe 2-story brick warehous	the kind(s) of property sold (e.g , r e, or common stock, 200 shares ML	eal estate, .C Company)	(b) How acc P — Purcl D — Dona	nase	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a	Treasury Note GE4			P		01/31/07	01/31/09
	Treasury Note GT1			P		05/31/07	05/29/09
	Treasury Note GY0			P		07/31/07	07/31/09
	Treasury Note HB9		<u> </u>	P		08/31/07	08/31/09
e	See Columns (a) thru (d)						
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bar plus expense of sa			(h) Gain or (e) plus (f) m	
a	5,000.			4,995.			5.
t	27,000.			6,994.			6.
	5,000.			4,990.			10.
- 0	5,000.			4,989.			11.
	See Columns (e) thru (h)		5	5,923.			77.
	Complete only for assets showing	ng gain in column (h) and owned by	the foundation on 12/31/69			(I) Gains (Colt	ımn (h)
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if a	n (I) ny		ain minus column (k an -0-) or Losses (fr	
a							5.
t)						6.
							10.
	<u> </u>						11.
	See Columns (i) thru (l)						77.
2	Capital gain net income or (net	capital loss) — If gain, also	enter in Part I, line 7 ter -0- in Part I, line 7		2		109.
3	Net short-term capital gain or (le	oss) as defined in sections 1222(5)	and (6)	}			
	If gain, also enter in Part I, line in Part I, line 8	8, column (c) (see the instructions)	If (loss), enter -0-	-	3		
Par		Section 4940(e) for Reduce	d Tay on Net Investme	ent Inco			
If sec	ction 4940(d)(2) applies, leave the the foundation liable for the sectes, the foundation does not quali	ion 4942 tax on the distributable am fy under section 4940(e) Do not co	nount of any year in the base mplete this part	e period?	,	X Yes	☐ No
1	Enter the appropriate amount in	each column for each year, see th	e instructions before making	any entri	es		
	(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use as:	sets	(colı	(d) Distributior umn (b) divided	
	2008						
	2007						
	2006						
	2005						
	2004						
2	Total of line 1, column (d)				2		
3	Average distribution ratio for the number of years the foundation	e 5-year base period – divide the tol has been in existence if less than 5	al on line 2 by 5, or by the years		3		
4	Enter the net value of noncharit	able-use assets for 2009 from Part	X. line 5		4		
			· ,	ŀ	-		
5	Multiply line 4 by line 3				5		
6	Enter 1% of net investment inco	ome (1% of Part I, line 27b)			6		
7	Add lines 5 and 6				7_		
8	Enter qualifying distributions fro	m Part XII, line 4		Į	8		
	If line 8 is equal to or greater the Part VI instructions.	an line 7, check the box in Part VI,	line 1b, and complete that p	oart using	a 1%	tax rate. See th	e

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Part		ıctions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling or determination letter: (attach copy of letter if necessary · see instr.)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V,		2	245.
	check here ▶ ☐ and enter 1% of Part I, line 27b			1
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable		-	
	foundations only Others enter -0-)			0.
3	Add lines 1 and 2			<u> 245.</u>
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			<u> </u>
-	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			245.
	Credits/Payments			
	2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 436.			
	Exempt foreign organizations — tax withheld at source 6b			
	Tax paid with application for extension of time to file (Form 8868)			
	Backup withholding erroneously withheld 6d			J
	Total credits and payments Add lines 6a through 6d			<u> 136.</u>
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8			
	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			
	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			<u>191.</u>
	Enter the amount of line 10 to be Credited to 2010 estimated tax			
Part	VII-A Statements Regarding Activities	 _		
1 a	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?	1a	Yes	No X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		x
	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			
С	Did the foundation file Form 1120-POL for this year?	1c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the foundation \$ (2) On foundation managers \$	_		
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on			
2	foundation managers \$ Has the foundation engaged in any activities that have not previously been reported to the IRS?		· 	J
2		_2		X
	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	···	X
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If 'Yes,' has it filed a tax return on Form 990-T for this year?	4b		<u> </u>
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	_	x
_	If 'Yes,' attach the statement required by General Instruction T	-		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	By language in the governing instrument, or			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		Х
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	Х	
8 a	Enter the states to which the foundation reports or with which it is registered (see the instructions) North Carolina			
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		
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5)			
10	for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV' Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names	9		X
	and addresses	10		X
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	n 990-PF (2009) Serfco, Inc.	23-	732805	6	F	Page 5
Par	t VII-A Statements Regarding Activities Continued	_ -				
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)			11	!	x
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address	applicatio	on?	13	Х	
14	Website address ► N/A The books are in care of ► Anita W. Southard Telephon		(804)	683	 -213	
	Located at ► 14606 Little Hawk DriveMidlothianVA ZIP + 4 ►			- -	_ <u></u> _ 	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	_	I		•	
Day	and enter the amount of tax-exempt interest received or accrued during the year t VII-B Statements Regarding Activities for Which Form 4720 May Be Required		15			
Par	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.				V	
1.	a During the year did the foundation (either directly or indirectly)			-	Yes	No
1 6	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes	X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a	□				
	disqualified person?	Yes	X No			!
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X 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	X 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	X No			
l	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 the instructio	ns)?		1b		
	Organizations relying on a current notice regarding disaster assistance check here	•	· 🔲			
•	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?			1 c		X_
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			:		
•	a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	Yes	X No			
	If 'Yes,' list the years ▶ 20 , 20 , 20 , 20					
1	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a	a)(2)				
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a all years listed, answer 'No' and attach statement — see the instructions))(2) to		2b		<u> </u>
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years h	oro		20	<u> </u>	X
`	► 20, 20, 20	31 C				
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X No			
I	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	<u> </u>	_x_
4:	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		х
	b Did the ferrade transaction and the second					
	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				<u> </u>	
- BAA	the tax year beginning in 2009?			4b	0.55	X_
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Part VII-B Statements Regarding Activit	ies for Which Form	14720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incur	any amount to				
(1) Carry on propaganda, or otherwise attemp	t to influence legislation	(section 4945(e))?	☐ Yes X	No	
(2) Influence the outcome of any specific publ on, directly or indirectly, any voter registra	c election (see section attion drive?	4955), or to carry	Yes X	No	
(3) Provide a grant to an individual for travel,		•	Yes X	No	
(4) Provide a grant to an organization other th in section 509(a)(1), (2), or (3), or section	an a charitable, etc, org 4940(d)(2)? (see instru	janization described ctions)	Yes X	No	
(5) Provide for any purpose other than religiou educational purposes, or for the prevention	is, charitable, scientific, n of cruelty to children o	literary, or r animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of t described in Regulations section 53 4945 or in (see instructions)?	he transactions fail to qual a current notice regardi	ualify under the exception ing disaster assistance	ons	5 b	x
Organizations relying on a current notice regar	ding disaster assistance	e check here	▶ 🗌		
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure response	ne foundation claim exemple to the control of the control of the grant?	mption from the	Yes	No	
If 'Yes,' attach the statement required by Regu	lations section 53 4945	·5(d)			
6a Did the foundation, during the year, receive an on a personal benefit contract?		3, 13,	Yes X	No	
b Did the foundation, during the year, pay premiin If 'Yes' to 6b, file Form 8870.	urns, directly or indirectl	y, on a personal benefit	contract?	6b	X
7a At any time during the tax year, was the found	ation a party to a prohib	oited tax shelter transact	non? Yes X	No	
b If yes, did the foundation receive any proceeds				7b	
Part VIII Information About Officers, D and Contractors	irectors, Trustees,	Foundation Manag	gers, Highly Paid E	imployees	,
1 List all officers, directors, trustees, foundation	n managers and their c	ompensation (see instri	uctions).		
	(b) Title and average	(c) Compensation	(d) Contributions to	(e) Expense	account.
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	other allo	
Willis Dewayne Wiesenmiller	Dinastan				
764 Corbett Road Clayton, NC 27520	Director 0.00	0.	0.		0.
Dr. Garnett B. Whitehurst				-	
1983 Hoods Creek Road	Director				
New Bern NC 28562	0.00	0.	0.		0.
Anita W. Southard14606 Little Hawk Dr	Di wa at aw				
Midlothian VA 23114-6500	Director 0.00	0.	0.		370.
		5.			
2 Compensation of five highest-paid employee	s (other than those incl	uded on line 1— see ins	tructions). If none, ente	r '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 other allo	
NONE					
0					
0					
0		-			
0					
Total number of other employees paid over \$50,000			•		None
RΔΔ	TEE ADROS O	7/06/00		Form 990	-PF (2009)

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid I and Contractors (continued)	Employees,
3 Five highest-paid independent contractors for professional services – (see 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	None
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	_
Dat IV D Common of Dogram Deleted Investment (common deleted Investment)	
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
·	_
2	
	_
All other program-related investments See instructions. 3	
~	-
Total. Add lines 1 through 3	-
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Part X Minimum Investment Return (All domestic foundations must complete this particle see instructions.)	rt. Foreign foundat	tions,
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	1 a	
b Average of monthly cash balances	1 b	
← Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	
€ Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)		
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	0.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	0.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	0.
6 Minimum investment return. Enter 5% of line 5	6	0.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private		ons
and certain foreign organizations check here ► and do not complete the	ıs part.)	
1 Minimum investment return from Part X, line 6	1	0.
2a Tax on investment income for 2009 from Part VI, line 5	245.	
b Income tax for 2009 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2c	245.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	0.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	0.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	0.
Part XII Qualifying Distributions (see Instructions)	.,	
1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	2,538.
b Program-related investments — total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 Arnounts 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	2,538.
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 instructions) 6 Adjusted qualifying distributions. Subtract line 5 from line 4	5	<u>0.</u> 2,538.
, , , , ,		<u> </u>
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating v qualifies for the section 4940(e) reduction of tax in those years		
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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7			-	0.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years 20 , 20 , 20				
3 Excess distributions carryover, if any, to 2009				
a From 2004 3,872.				
b From 2005 647.				
c From 2006 22,233.				
d From 2007 45,056.				
e From 2008 31,051.				
f Total of lines 3a through e	102,859.			
4 Qualifying distributions for 2009 from Part				
XII, line 4 ► \$2,538.				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
 Treated as distributions out of corpus (Election required — see instructions) 				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus	2,538.			
5 Excess distributions carryover applied to 2009				
(If an amount appears in column (d), the same amount must be shown in column (a))	ŕ			
		4		
6 Enter the net total of each column as	¢	*		
indicated below:				•
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	105,397.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistribut-				
ed 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 instructions		0.		
e Undistributed income for 2008 Subtract line 4a from				
line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009 Subtract lines				
4d and 5 from line 1. This amount must be				
distributed in 2010			······································	0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
,				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	3,872.		L	
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	101,525.			
10 Analysis of line 9	, = = -			· ./ · · · · · · · · · · · · ·
a Excess from 2005 647.				
b Excess from 2006 22,233.				
c Excess from 2007 45,056.				,
d Excess from 2008 31,051.				
e Excess from 2009 2,538.		,		

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Part XIV Private Operating Foundation	ons (see instruc	tions and Part V	/II-A, question 9	9)	N/A
1 a If the foundation has received a ruling or d is effective for 2009, enter the date of the r	etermination letter t	hat it is a private op	erating foundation,	and the ruling	
b Check box to indicate whether the foundation	-	atıng foundation des	cribed in section	4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year	l l l l l l l l l l l l l l l l l l l	Prior 3 years	1 1 13 12 0 0 0 1	1 10 12 17 107
income from Part I or the minimum investment return from Part X for	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Aniounts included in line 2c not used directly for active conduct of exempt activities					
 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	
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section					
512(a)(5)), or royalties)	<u> </u>				
(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 assets at any time during the			organization ha	ad \$5,000 or mor	e in
1 Information Regarding Foundation Manag					
a List any managers of the foundation who h close of any tax year (but only if they have	ave contributed more the contributed more the	re than 2% of the tot nan \$5,000) (See se	tal contributions rec ection 507(d)(2))	ceived by the foundati	on before the
b List any managers of the foundation who o	wn 10% or more of	the stock of a corpo	ration (or an equal)	ly large portion of the	ownership of
a partnership or other entity) of which the	foundation has a 10	% or greater interes	t	ly large portion of the	ownership of
2 Information Demanding Contribution Cont	A City I can Sabal				
2 Information Regarding Contribution, Gran Check here X If the foundation only in		• • • •		and does not accept	unsolicited
requests for funds. If the foundation makes complete items 2a, b, c, and d					
a The name, address, and telephone numbe	r of the person to w	hom applications sh	ould be addressed:		
	 				
b The form in which applications should be s	submitted and inforn	nation and materials	they should include	e.	
c Any submission deadlines					
d Any restrictions or limitations on awards, s	such as by geograph	iical areas, charitabl	le fields, kinds of in	stitutions, or other fac	ctors
					
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3 Grants and Contributions Paid During the Ye		ro Paymont		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of		Amount
Name and address (home or business)	substantial contributor	status of recipient	contribution	
a Paid during the year				
See attached				
VA 23120				41,412.
]		
T-1-1				
Total	 		> 3a	41,412.
b Approved for future payment				
	<u> </u>		<u> </u>	
Total			<u>► 3b</u>	<u> </u>

Enter gross amounts unless otherwise indicated	Unrelated	business income	Excluded by	section 512, 513, or 514	
1. Decrease convention	(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	(e) Related or exempt function income
1 Program service revenue			code		(see the instructions)
a			+		
b			++		
c			+	<u>-</u>	
d			+		
e	_				
g Fees and contracts from government agencies					· · · · · ·
2 Membership dues and assessments	<u> </u>				
3 Interest on savings and temporary cash investments	 		14	12 201	
4 Dividends and interest from securities		 	14	12,281. 1,309.	· · · · · · · · · · · · · · · · · · ·
5 Net rental income or (loss) from real estate			1-14-	1,309.	
a Debt-financed property			 		
b Not debt-financed property	 		-		
6 Net rental income or (loss) from personal property			1	•	
7 Other investment income		······································	18	172.	
8 Gain or (loss) from sales of assets other than inventory			1 - 3		
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory		_			
11 Other revenue					
a Refund			1	265.	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				14,027.	
13 Total. Add line 12, columns (b), (d), and (e)				13	14,027
See worksheet in the instructions for line 13 to verify	calculations)		_		
Part XVI-B Relationship of Activities to t	he Accomplish	ment of Evem	nt Purnose	<u> </u>	

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions)
	
	
	
	

Form 990-PF (2009) Serfco, Inc. Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

												V	-
	descri	ie organization dir ibed in section 50	1(c) of th	ne Code (oth	gage in any ier than sec	y of the follo	wing with a	ny othe	er organization or in section 52	7.		Yes	No
	relatır	ng to political orga	inizations	s?			. , •			•			
	a Trans (1) C	fers from the repo	orting fou	indation to a	noncharita	ible exempt	organizatio	on of			10(1)		v
	• • •	ther assets									1a (1) 1a (2)		X
		transactions:									(4 (2)		
		ales of assets to a	a noncha	ırıtable exem	not organiz	ation					1 b (1)		X
		urchases of asset					1				1 b (2)		X
		ental of facilities,			•	- 3					1 b (3)		X
	(4) R	eimbursement arr	angemer	nts							1 b (4)		X
	(5) Lo	oans or loan guar	antees								1 b (5)		Х
	(6) P	erformance of ser	vices or	membership	or fundrai	sıng solıcıta	tions				1b (6)		X
	c Sharıı	ng of facilities, eq	uıpment,	mailing list	s, other ass	sets, or paid	l employees	3			1 c	<u> </u>	X
	the go	answer to any of oods, other assets ansaction or shar	, or serv	ices aiven b	y the repor	tıng foundat	ion If the f	oundatı	on received les	s than fair mai	rket value in	of	
(:	Line no	(b) Amount invol				e exempt organ			Description of tran			nement	<u> </u>
٠,	ij cino no	(b) / mount mon	-	(G) Hame o	- Honondireasi	o oxompt organ	IIIZUUUII	(u)	Description of trui	isiers, transactions	, and sharing arrai	igonione	
								_				_	
_				·									
_				<u>.</u>									
_													
							+				- <u>-</u>		
							-			·			
_													
_													
	2a Is the descr	foundation direct ibed in section 50	ly or indi 1(c) of th	rectly affiliat ne Code (oth	ted with, or ner than sec	related to, oction 501(c)	one or more (3)) or in se	e tax-ex ection 5	kempt organiza 27°	tions	Yes	- X	No
		s,' complete the fo											
		(a) Name of orga	nization		(b)	Type of org	janization		(0	:) Description of	or relationship		
													
		 -						-		·			
													
_		· · ·											
	Under pena complete [alties of perjury, I decla Declaration of preparer	re that I have (other than	ve examined this taxpayer or fide	is return, inclui uciary) is base	ding accompany d on all informa	ring schedules ition of which p	and state reparer h	ments, and to the b as any knowledge	est of my knowledg	e and belief, it is tru	ie, corre	ct, and
3	► Signa	ature of officer or truste	Sont	hard	<i>!</i>			Date	6/2010	Title	dest		
4								Date		Observed	Preparer's Identify	ing num	ber
1	Paid	Preparer's signature	1	<u> </u>	asa	_		0.5	/03/10	Check if	(See Signature in	tne insti フザ	:s)
₹	Pre- parer's	Firm's name (or T	he Ni	chols G	roup	PA		103	, UJ/IU	employed ►	3086410	<u>' ' ' </u>	
	Ùse	WOUTE If colf		ingsley		Ste D				Lav J	2000110		
	Only	address and —	range			<u> </u>	FI	32	073	Phone no	(904) 264	-166	55
B/	\	, 0000							<u> </u>	1	Form 99		

Form 990-PF, Page 1, Part I, Line 23

Line 23 Stm	Ιt
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Other expenses.	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Bank charges	132.	132.	132.	0.
Office expense	1,693.	564.	564.	1,128.

Total <u>1,825.</u> <u>696.</u> <u>1,128.</u>

Form 990-PF, Page 2, Part III, Line 3

Other Increases Stmt

Capital Gain on Treasury Notes	109.
Capital Gain Dividend Distribution	172.
Total	281

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)	(b) How acquired P-Purchase D-Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
Treasury Note HD5	P	10/01/07	09/30/09
Treasury Note HF0	P	10/31/07	10/31/09
Treasury Note FX3	P	11/15/06	11/15/09
Treasury Note HJ2	P	11/30/07	_11/30/09

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income **Columns (e) thru (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)
3,000. 25,000. 25,000. 3,000.		3,000. 24,953. 24,972. 2,998.	0. 47. 28. 2.
Total		55,923.	77.

Form 990-PF, Part IV, Capital Gains and Losses for Tax on Investment Income Columns (i) thru (I)

by the foundation on 12/31/69				
(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	but not less than -0-) or losses (from column (h))		
		<u> </u>		
		28.		
	/31/69 (j) Adjusted basis	(j) Adjusted basis (k) Excess of column (i)		

Complete only for asset by the foundation on 12	(1) Gains (column (h) gain minus column (k),			
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (ı) over column (j), ıf any	but not less than -0-) or losses (from column (h))	

Form 990-PF, Page 2, Part II, Line 10a L-10a Stmt

	End o	of Year	End of Year		
Line 10a - Investments - US and State Government Obligations:	State and Local Obligations Book Value	State and Local Obligations FMV	US Government Obligations Book Value	US Government Obligations FMV	
Treasury Bills-CVB OID INTEREST			570,106. 1,073.	570,400. 1,073.	
Total			571,179.	571,473.	

Form 990-PF, Page 2, Part II, Line 10b L-10b Stmt

	End of Year		
Line 10b - Investments - Corporate Stock:	Book Value	Fair Market Value	
SEE ATTACHED SCHEDULE	29,437.	29,746.	
Total	29,437.	29,746.	

Form 990-PF, Page 2, Part II, Line 13 L-13 Stmt

	End of Year		
Line 13 - Investments - Other:	Book Value	Fair Market Value	
SEE ATTACHED SCHEDULE	14,688.	15,577.	
Total	14,688.	15,577.	

3

Supporting Statement of:

Form 990-PF,p12/Line 3 Column (d)

ınt
,126. 81.
,074.

Supporting Statement of:

Form 990-PF,p12/Line 4 Column (d)

Description	Amount
T. Rowe Price	1,008.
Money Market	13.
Mutual Funds	288.

Supporting Statement of:

Form 990-PF,p12/Line 7 Column (d)

Description	Amount	
Capital Gain Distribution - T.Rowe Price		
Total	172.	

SERFCO, INC. CONTRIBUTION LIST Jan. 1 to Dec. 31, 2009

501C3 Organization Alzheimer's Association PO Box 96011 Washington, DC 20090-6011 American Cancer Society PO Box 429 Richmond, VA 23218-0429 American Heart Association 4217 Park Place Court	\$100.00 \$85.00
PO Box 96011 Washington, DC 20090-6011 American Cancer Society PO Box 429 Richmond, VA 23218-0429 American Heart Association	
Washington, DC 20090-6011 American Cancer Society PO Box 429 Richmond, VA 23218-0429 American Heart Association	\$85.00
American Cancer Society PO Box 429 Richmond, VA 23218-0429 American Heart Association	\$85.00
PO Box 429 Richmond, VA 23218-0429 American Heart Association	Ψ00.00
Richmond, VA 23218-0429 American Heart Association	
American Heart Association	
	\$70.00
est it cain ciai # 1 JUU	Ψ70.00
	\$100.00
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	\$8,200.00
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	\$200.00
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	\$16,100.00
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	Ψ0,000.00
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	\$1,200.00
	Ψ1,200.00
	\$25.00
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	Glen Allen, VA 23060 Bon Secours Richmond Health Care Foundation 5875 Bremo Road, Suite 710 Richmond, VA 23226 College Leadership Foundation 13141 Rittenhouse Drive, #501 Midlothian, VA 23112 Cumberland College 6191 College Station Drive Williamsburg, KY 40769-1372 DAV Cincinnati, OH 45250-0301 First Baptist Church of Mayodan 101 South First Avenue Mayodan, NC 27025 Mayo Clinic 200 First Street SW Rochester, MN 55905 Mount Hermon Baptist Church 18100 Genito Road Moseley, VA 23120 Noah's Children One Monument Avenue 413 Stuart Circle, Suite 210 Richmond, VA 23220 Pilot Baptist Church Highway 39S Zebulon, NC 27597 Pilot's Lion Club Highway 39S Zebulon, NC 27597 RBC Ministries PO Box 2222

SERFCO, INC. CONTRIBUTION LIST Jan. 1 to Dec. 31, 2009

	Grand Rapids, MI 49501-2222	
15	Salvation Army	\$540.00
	PO Box 12400	
	Richmond, VA 23241-0400	
16	Summerfield United Methodist Church	\$1,200.00
	Churchview Lane	
	Fries, VA 24330	
17	Summerfield Cemetery Trust Fund	\$1,200.00
	Churchview Lane	
	Fries, VA 24330	
18	Trinity Baptist Church	\$7,700.00
	800 Hammond Blvd.	
	Jacksonville, FL 32221	
19	US0	\$50.00
	PO Box 96860	
	Washington, DC 20077-7677	
20	Veterans of Foreign Wars	\$120.00
	406 West 34th Street	
	Kansas City, MO 64111	
21	YMCA of Greater Richmond	\$200.00
	737 Coalfield Road	
	Midlothian, VA 23114	
	Total Contributions	\$41,412.00

SERFCO, INC. Form 900-PF Part II Balance Sheets December 31, 2009 23-7328056

		END OF YEAR
STOCKS	COST	FMV
ALTRIA GROUP INC	1,803.93	2,079.57
AQUA AMERICA INC	2,135.58	1,807.32
DUKE ENERGY CORP NEW	1,595.43	1,833.14
KRAFT FOODS INC	3,030.00	2,813.80
PIEDMONT NAT GAS INC	2,640.83	2,765.93
PLUM CREEK TIMBER CO	3,367.76	3,990.36
SOUTHERN CO COM	7,246.06	7,048.87
VALERO ENERGY CORP	2,681.75	1,733.92
VERIZON COMMUNICATIONS	3,018.57	3,467.65
WESTAR ENERGY INC	1,917.95	2,205.28
	29,437.86	29,745.84
MUTUAL FUNDS		
T. ROWE PRICE CAPITAL APPRECIATION	3,220.08	3,251.60
T.ROWE PRICE DIVIDEND GROWTH	2,870.58	3,139.44
T. ROWE PRICE INFLATION-PROTECTED BOND	2,537.96	2,653.76
T.ROWE PRICE SPECTRUM INCOME	3,421.35	3,872.70
T.ROWE PRICE TAX-FREE INCOME	2,638.32	2,659.25
	14,688.29	15,576.75