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Return of Private Foundation

2009

Department of the Treasury
Internal Revenue Serviceor Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

H&R BLOCK FOUNDATION

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

ONE H&R BLOCK WAY

City or town, state, and ZIP code

KANSAS CITY, MO 64105

A Employer identification number

23-7378232

B Telephone number

816-854-4361

C 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 foundation

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

\$ 54,319,047. (Part I, column (d) must be on cash basis.)

J Accounting method

☐ Cash☐ Accrual☒ Other (specify) MODIFIED CASH

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not
necessarily equal the amounts in column (a))(a) Revenue and
expenses per books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable purposes
(cash basis only)

Revenue	1 Contributions, gifts, grants, etc., received	2,000,000.		N/A		
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B					
	3 Interest on savings and temporary cash investments	27,654.	27,654.		STATEMENT 1	
	4 Dividends and interest from securities	903,972.	903,972.		STATEMENT 2	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	-3,910,118.				
	b Gross sales price for all assets on line 6a	5,472,675.				
	7 Capital gain net income (from Part IV, line 2)		0.			
	8 Net short-term capital gain					
9 Income modifications						
10a Gross sales less returns and allowances						
b Less Cost of goods sold						
c Gross profit or (loss)						
11 Other income	12,276,378.	22,587.		STATEMENT 3		
12 Total. Add lines 1 through 11	11,297,886.	954,213.				
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	223,664.	33,550.		190,114.	
	14 Other employee salaries and wages					
	15 Pension plans, employee benefits					
	16a Legal fees					
	b Accounting fees	STMT 4	18,260.	14,608.		3,652.
	c Other professional fees	STMT 5	159,151.	156,018.		3,133.
	17 Interest					
	18 Taxes	STMT 6	7,843.	8,595.		0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 7	192,445.	24,080.		160,723.
	24 Total operating and administrative expenses. Add lines 13 through 23		601,363.	236,851.		357,622.
25 Contributions, gifts, grants paid		3,134,701.			3,134,701.	
26 Total expenses and disbursements. Add lines 24 and 25		3,736,064.	236,851.		3,492,323.	
27 Subtract line 26 from line 12		7,561,822.				
a Excess of revenue over expenses and disbursements						
b Net investment income (if negative, enter -0-)		717,362.				
c Adjusted net income (if negative, enter -0-)			N/A			

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	33,048.	44,763.	44,763.
	2 Savings and temporary cash investments	2,524,931.	1,053,127.	1,053,127.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	41,643,001.	53,221,157.	53,221,157.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	44,200,980.	54,319,047.	54,319,047.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 10)	30,445.	31,591.	
Net Assets or Fund Balances	23 Total liabilities (add lines 17 through 22)	30,445.	31,591.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	35,584,560.	35,584,560.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
Net Assets or Fund Balances	29 Retained earnings, accumulated income, endowment, or other funds	8,585,975.	18,702,896.	
	30 Total net assets or fund balances	44,170,535.	54,287,456.	
	31 Total liabilities and net assets/fund balances	44,200,980.	54,319,047.	

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	44,170,535.
2 Enter amount from Part I, line 27a	2	7,561,822.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	2,555,099.
4 Add lines 1, 2, and 3	4	54,287,456.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	54,287,456.

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				
b SEE ATTACHED STATEMENTS				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 5,472,675.		9,382,793.	-3,910,118.

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			-3,910,118.

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	-3,910,118.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	2,014,405.	55,734,107.	.036143
2007	2,949,153.	65,353,698.	.045126
2006	2,255,722.	58,302,586.	.038690
2005	3,608,694.	52,438,568.	.068818
2004	3,371,202.	48,206,359.	.069933

2 Total of line 1, column (d)	2	.258710
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	.051742
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	45,849,727.
5 Multiply line 4 by line 3	5	2,372,357.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	7,174.
7 Add lines 5 and 6	7	2,379,531.
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	8	3,292,323.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	7,174.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	7,174.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	7,174.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	68,954.	
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	68,954.	
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	61,780.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 61,780. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

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

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>HRBLOCKFOUNDATION.ORG</u>	13	X	
14	The books are in care of ► <u>DAVID MILES</u> Telephone no ► <u>816-854-4361</u> Located at ► <u>ONE H&R BLOCK WAY, KANSAS CITY, MO</u> ZIP+4 ► <u>64105</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► <u>15</u>			

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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	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 ► _____		
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)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

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

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

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

X**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE SCHEDULE 4A	PRESIDENT/VICE	PRESIDENT		
	40.00	223,664.	32,327.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

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

Total number of other employees paid over \$50,000**0**

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
HRB MANAGEMENT, INC. ONE H&R BLOCK WAY, KANSAS CITY, MO 64105	ADMINISTRATIVE	284,199.
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET, BOSTON, MA 02110-2112	CONSULTING	78,524.

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 SEE ATTACHED GRANT SCHEDULE	
	3,134,701.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	45,075,755.
b	Average of monthly cash balances	1b	1,472,191.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	46,547,946.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	46,547,946.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	698,219.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	45,849,727.
6	Minimum investment return Enter 5% of line 5	6	2,292,486.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6	1	2,292,486.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	7,174.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	7,174.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	2,285,312.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,285,312.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	2,285,312.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	3,492,323.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	SEE STATEMENT 11
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	3,292,323.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	7,174.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	3,285,149.

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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				2,285,312.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	900,520.			
b From 2005	1,035,290.			
c From 2006	100,000.			
d From 2007	100,000.			
e From 2008				
f Total of lines 3a through e	2,135,810.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 3,292,323.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				2,285,312.
e Remaining amount distributed out of corpus	1,007,011.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	3,142,821.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
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		0.		
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 instr			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)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	900,520.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	2,242,301.			
10 Analysis of line 9				
a Excess from 2005	1,035,290.			
b Excess from 2006	100,000.			
c Excess from 2007	100,000.			
d Excess from 2008				
e Excess from 2009	1,007,011.			

N/A

- ▶

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income

[illegible]

SEE SCHEDULE 5A

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> SEE SCHEDULE 6A				3,134,701.
Total			► 3a	3,134,701.
b <i>Approved for future payment</i> SEE SCHEDULE 7A				1,132,580.
Total			► 3b	1,132,580.

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

- | | | Yes | No |
|---|--|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |


[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		





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

Sign Here


Signature of officer or trustee

8/31/10
Date

✓ President

Paid Preparer's Use Only	Preparer's signature  JEFFREY D. ROSEN, C.P.A.	Date 08/19/10	Check if self-employed  <input checked="" type="checkbox"/>	Preparer's identifying number
	Firm's name (or yours if self-employed), address, and ZIP code  J.D. ROSEN, C.P.A., P.C. 11300 TOMAHAWK CREEK PKWY., SUITE 120 LEAWOOD, KS 66211-2670	EIN 	Phone no (913) 451-4510	

Form **990-PF** (2009)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

H&R BLOCK FOUNDATION

Employer identification number

23-7378232

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule**

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

H&R BLOCK FOUNDATION

23-7378232

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	H&R BLOCK, INC. ONE H&R BLOCK WAY KANSAS CITY, MO 64105	\$ 2,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

H&R BLOCK FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a WELLINGTON CTF REAL ESTATE SECURITIES PER K-1		VARIOUS	VARIOUS
b ACADIAN INTERNATIONAL SMALL CAP FUND-PER K1		VARIOUS	VARIOUS
c BANK OF AMERICA CAPITAL MGMT FUND (MARSICO) PER K		VARIOUS	VARIOUS
d STATE STREET BANK & TRUST RUSSELL 3000 PER K-1		VARIOUS	VARIOUS
e STATE STREET BANK & TRUST MSCI EAFE PER K-1		VARIOUS	VARIOUS
f STATE STREET BANK & TRUST US AGGREGATE BOND PER K		VARIOUS	VARIOUS
g VANGUARD SECURITIES	P	VARIOUS	VARIOUS
h IRONWOOD INTERNATIONAL		VARIOUS	VARIOUS
i WELLINGTON CTF REAL ESTATE SECURITIES PER K-1		VARIOUS	VARIOUS
j ACADIAN INTERNATIONAL SMALL CAP FUND PER K-1		VARIOUS	VARIOUS
k BANK OF AMERICA CAPITAL MGMT FUND (MARSICO) PER K		VARIOUS	VARIOUS
l VANGUARD SECURITIES	P	VARIOUS	VARIOUS
m ARCHIPELAGO HOLDING CLASS A	P	VARIOUS	VARIOUS
n DIMENSIONAL EMERGING MARKETS	P	VARIOUS	VARIOUS
o STATE STREET BANK & TRUST RUSSELL 3000 PER K-1		VARIOUS	VARIOUS

(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		322,304.	-322,304.
b		79,067.	-79,067.
c	11,250.		11,250.
d		23,504.	-23,504.
e	637.		637.
f	67,314.		67,314.
g	208,953.	259,000.	-50,047.
h	300.		300.
i		2,236,656.	-2,236,656.
j		211,233.	-211,233.
k		170,727.	-170,727.
l	4,763,114.	5,903,952.	-1,140,838.
m	114,687.		114,687.
n	59,460.		59,460.
o		10,546.	-10,546.

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-322,304.
b			-79,067.
c			11,250.
d			-23,504.
e			637.
f			67,314.
g			-50,047.
h			300.
i			-2,236,656.
j			-211,233.
k			-170,727.
l			-1,140,838.
m			114,687.
n			59,460.
o			-10,546.

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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)
If gain, also enter in Part I, line 8, column (c)
If (loss), enter "-0-" in Part I, line 8

3

H&R BLOCK FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a	STATE STREET BANK & TRUST MSCI EAFE PER K-1		VARIOUS	VARIOUS
b	STATE STREET BANK & TRUST US AGGREGATE BOND PER K	P	VARIOUS	VARIOUS
c	IRONWOOD INTERNATIONAL		VARIOUS	VARIOUS
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a		7,364.	-7,364.
b	246,960.		246,960.
c		158,440.	-158,440.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) 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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-7,364.
b			246,960.
c			-158,440.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	-3,910,118.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	3	N/A

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
COMMERCE BANK	4.
H&R BLOCK BANK	27,621.
INTERNAL REVENUE SERVICE	29.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	27,654.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
INVESTMENTS-DIVIDENDS	443,873.	0.	443,873.
INVESTMENTS-INTEREST	460,099.	0.	460,099.
TOTAL TO FM 990-PF, PART I, LN 4	903,972.	0.	903,972.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
UNREALIZED CAPITAL INCOME	12,253,791.	0.	
MISCELLANEOUS INCOME (EXPENSE)	22,587.	22,587.	
TOTAL TO FORM 990-PF, PART I, LINE 11	12,276,378.	22,587.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	18,260.	14,608.		3,652.
TO FORM 990-PF, PG 1, LN 16B	18,260.	14,608.		3,652.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CONSULTING FEES	9,066.	7,253.		1,813.	
INVESTMENT SERVICE FEE	64,961.	64,961.		0.	
AUDIT FEES	6,600.	5,280.		1,320.	
INVESTMENT ADVISER FEE	78,524.	78,524.		0.	
TO FORM 990-PF, PG 1, LN 16C	159,151.	156,018.		3,133.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX PAYMENT	-752.	0.		0.	
FOREIGN TAXES	8,595.	8,595.		0.	
TO FORM 990-PF, PG 1, LN 18	7,843.	8,595.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
SEE SCHEDULE 2A	184,803.	16,438.		160,723.	
OTHER INVESTMENT EXPENSES	7,642.	7,642.		0.	
TO FORM 990-PF, PG 1, LN 23	192,445.	24,080.		160,723.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
INVESTMENT ACTIVITY RECORDED ON TAX RETURN NOT ON BOOKS--SEE SCHEDULE 2B	2,544,660.
INVESTMENT EXPENSES DEDUCTED ON TAX RETURN NOT ON BOOKS--SEE SCHEDULE 2B	10,439.
TOTAL TO FORM 990-PF, PART III, LINE 3	2,555,099.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE INVESTMENTS SCHEDULE	FMV	53,221,157.	53,221,157.
TOTAL TO FORM 990-PF, PART II, LINE 13		53,221,157.	53,221,157.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	10
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DUE TO H&R BLOCK, INC.	30,445.	31,591.
TOTAL TO FORM 990-PF, PART II, LINE 22	30,445.	31,591.

FORM 990-PF

EXPLANATION OF CASH SET-ASIDE
PART XII, LINE 3B

STATEMENT 11

PLEASE SEE ATTACHMENT SCHEDULE 4 FOR THE DETAIL SUPPORTING THE CASH
SET ASIDE ADJUSTMENT

The H&R Block Foundation
23-7378232
2009
Form 990-PF-Schedule 2A
Part 1, Analysis of Revenues and Expenses

Line 16b, Accounting fees

Type of Service	Per Books	Net Investment Income	Adjusted Net Income	Charitable Purpose
Accounting Expense	18,260 00	14,608 00		3,652 00
Total	18,260 00	14,608 00		3,652 00

Line 16c, Other Professional Fees

Type of Service	Per Books	Net Investment Income	Adjusted Net Income	Charitable Purpose
Investment Service Fee	64,961 00	64,961 00		
Consulting Expenses	9,066 00	7,252 80		1,813 20
Audit Fee	6,600 00	5,280 00		1,320 00
Investment Adviser Fees	78,524 00	78,524 00		-
Total	159,151.00	156,017 80		3,133 20

Line 18, Taxes

Type of Service	Per Books	Net Investment Income	Adjusted Net Income	Charitable Purpose
2009 Excise Tax Payments	(752 00)			
Foreign Taxes	8,595.00	8,595 00		
Total	7,843 00	8,595 00		

Line 23, Other Expenses

Type of Service	Per Books	Net Investment Income	Adjusted Net Income	Charitable Purpose
Subscriptions and Books	2,320 00			2,320 00
Volunteer Program Expense	2,042 00			2,042 00
Special Event Expense	10,457 00			10,457 00
Miscellaneous	343 00			343 00
Meeting Expense	4,463 00			4,463 00
Computer and Data Processing Expense	4,643 00			4,643 00
Administrative Fee	160,535 00	24,080 25		136,454 75
Other Investment Expenses	7,642 00	7,642 00		-
Total	192,445 00	24,080 25		160,722 75

H&R Block Foundation
23-7378232
2009
Schedule 4A
Part VIII, Officers and Directors, Line 1

Name & Address	Title/Avg Hrs Per Week	Contribution to Employee Benefit Plan	Exp Acct Other Allowances	Compensation
Henry W Bloch 6400 Wenonga Terrace Shawnee Mission, KS 66205	Chairman, Treasurer Director/Varies	None	None	0
Frank L. Salizzoni One H&R Block Way Kansas City, MO 64105	Vice Chairman Director/Varies	None	None	0
William A Hall One H&R Block Way Kansas City, MO 64105	Director/Varies	None	None	0
Russell P Smyth One H&R Block Way Kansas City, MO 64105	Director/Varies	None	None	0
Edward T Matheny, Jr 2300 Main Street Kansas City, MO 64108	Director/Varies	None	None	0
Morton I Sosland One H&R Block Way Kansas City, MO 64105	Director/Varies	None	None	0
Doug Salaway One H&R Block Way Kansas City, MO 64105	Assistant Secretary/ Varies	None	None	0
Becky S Shulman One H&R Block Way Kansas City, MO 64105	Assistant Treasurer/ Varies	None	None	0
David P Miles One H&R Block Way Kansas City, MO 64105	President/40 hrs	17,637	None	140,000
Carey Wilkerson Looney One H&R Block Way Kansas City, MO 64105	Vice President & Secretary/40 Hrs	14,690	None	<u>83,664</u>
			Total	<u><u>223,664</u></u>

The H&R Block Foundation
23-7378232
2009
Form 990-PF-Schedule 2B
Changes in Net Assets

	<u>Per Books</u>	<u>Per Tax Form K-1</u>	<u>Tax Adjustment</u>
<i>Income:</i>			
Interest-Russell 3000	-	572.00	572.00
Interest-SSGA Passive Bond	-	446,128.00	446,128.00
Interest-SSGA MSCI	-	9.00	9 00
Interest-Marsico	-	301.00	301 00
Interest-CTF Wellington	-	13,035.00	13,035 00
Dividends-Acadian	63,982 00	58,336.00	(5,646 00)
Dividends-CTF Wellington	129,776.00	50,541 00	(79,235.00)
Dividends-Marsico	32,049 00	33,602.00	1,553 00
Dividends-SSGA MSCI	16,201 00	28,429.00	12,228 00
Dividends-SSGA Russell 3000	177,871 00	174,108 00	(3,763 00)
Dividends-SSGA Passive Bond	449,607 00	1,192 00	(448,415 00)
Capital Gains-CTF Wellington	(19,611.00)	(2,558,960.00)	(2,539,349 00)
Capital Gains-Acadian	(73,254 00)	(88,727 00)	(15,473 00)
Capital Gains-Marsico	3,842.00	(159,476 00)	(163,318.00)
Capital Gains-SSGA Russell 3000	(17 00)	(34,050.00)	(34,033.00)
Capital Gains-SSGA Passive Bonds	59,910.00	314,273.00	254,363 00
Capital Gains-SSGA MSCI	-	(6,729 00)	(6,729.00)
CTF Wellington	-	6,377.00	6,377 00
SSGA-Russell 3000	-	6,899 00	6,899 00
SSGA MSCI	-	943.00	943 00
SSGA-Passive Bond	-	8,893 00	8,893 00
Book/Tax Difference in Income	<u>840,356.00</u>	<u>(1,704,304.00)</u>	<u>(2,544,660.00)</u>
<i>Expense:</i>			
<i>Investment Expense</i>			
CTF Wellington		1,247 00	1,247.00
Marsico		411.00	411 00
SSGA-Russell 3000		1,995 00	1,995 00
SSGA MSCI	-	465.00	465 00
SSGA-Passive Bond		3,523 00	3,523 00
Total Investment Expense	-	7,641 00	7,641 00
<i>Foreign Tax</i>			
Wellington	-	2,357 00	2,357 00
Marsico	-	443 00	443 00
Total Foreign Tax	-	2,800.00	2,800.00
Book/Tax Difference in Expense			<u>10,441.00</u>
Net Book/Tax Difference			<u>(2,555,101.00)</u>

The H&R Block Foundation
23-7378232
2009
Form 990PF
Income Reconciliation

Summary:	Book/Tax Difference	Book Per Audit	Adj Income Tax
Capital Gains	(2,504,539)	(1,405,579)	(3,910,118)
Dividends	(523,278)	967,151	443,873
Interest	460,045	27,708	487,753
Foreign Taxes	(2,800)	(5,795)	(8,595)
Other Income	23,113	(526)	22,587
Other Expense	(7,641)	0	(7,641)
Total Book/Tax Difference	<u>(2,555,100)</u>	<u>(417,041)</u>	<u>(2,972,141)</u>

To reconcile income to tax return

Audited book income above (excluding foreign taxes)	(411,246)
Add (Subtract):	
Tax Cap Gains (Losses)	(2,504,539)
Tax Dividends	(523,278)
Tax Interest	460,045
Tax Adj for Other Income	23,113
Unrealized Gain on Books	12,253,791
Contribution Income	2,000,000
Book Taxable Income--Line 12(a) of 990-PF	<u>11,297,886</u>

Audited book expenses	3,725,623
Foreign Taxes	2,800
Other Expenses	7,641

Total Book Exp per tax return Line 26(a)	<u>3,736,064</u>
---	-------------------------

Adjusted Taxable Income per tax return line 27(a)	<u>7,561,822</u>
--	-------------------------

Adjustment to Retained Earnings to reconcile taxable income to Book Income

Beginning Net Assets	44,170,535
Net Income Per Tax Return	7,561,822
Add: Additional Taxable Income (loss)	2,544,659
Add: Additional Tax Expense	10,441
Ending Net Assets Per books-Part II, Line 6	<u>54,287,457</u>

The H&R Block Foundation
23-7378232
2009
Schedule 3
Part II, Balance Sheet, Investments-Securities, Line 13

Summary

Investments.	End of Year Book Value	Fair Market Value
Acadian International Small Cap Fund	2,448,508	2,448,508
Archipelago Holdings Class A	5,214,400	5,214,400
Dimensional Emerging Markets Fund	4,282,027	4,282,027
Longleaf Partners Fund	2,841,999	2,841,999
Ironwood International	4,941,013	4,941,013
Overstone Global Equity Fund	2,690,452	2,690,452
SSGA Passive Bond Market SL CTF	10,356,407	10,356,407
SSGA Russell 3000 Lending Index CTF	10,158,847	10,158,847
SSGA MSCI EAFE Index	4,492,021	4,492,021
T. Rowe Price New Era Fund	1,964,084	1,964,084
Wellington CTF Real Estate Securities	3,831,399	3,831,399
Total Investments	53,221,157	53,221,157

The H&R Block Foundation
23-7378232
2009
Cash Set Aside-Part XII, Line 3B
Schedule 4

Part XII—Qualifying Distributions

In 2009, The H&R Block Foundation did not set aside any contributions attributable to their 2009 Form 990 PF. The following provides information regarding the 2005 and 2004 funds set aside.

2005 Set Aside Amounts

In 2005, The H&R Block Foundation has set aside \$450,000 in funds to support Phase III of the Kansas City Community Development Initiative. The project entitled "Neighborhoods NOW" was fully funded and was completed in 2008. Remaining Funding due on Neighborhoods NOW is zero.

The Foundation has also set aside \$500,000 in funds to support start up expenses for the Partnership for regional education Preparation-Kansas City to provide necessary infrastructure to support regional school reform. The project funding will be completed in 2010. This project was not complete as of December 31, 2009. The remaining funding due on the Phase III project is \$100,000.

Amount Set Aside in 2005	\$ 950,000
Amount Paid in 2006—Subtracted from Current Year Grants Paid	(350,000)
Amount Paid in 2006—Subtracted from Current Year Grants Paid	(200,000)
Amount Paid in 2007—Subtracted from Current Year Grants Paid	(80,000)
Amount Paid in 2008—Subtracted from Current Year Grants Paid	(20,000)
Amount Paid in 2008—Subtracted from Current Year Grants Paid	(100,000)
Amount Paid in 2009—Subtracted from Current Year Grants Paid	(100,000)
Remaining Balance of Funds Set Aside in 2005	<u>\$ 100,000</u>

The H&R Block Foundation was incorporated on March, 7, 1974 as a nonprofit, Missouri, charitable organization. The H&R Block Foundation distributed in cash the start up period minimum amount as well as the full payment period minimum amounts in each taxable year of the Foundation's full payment period. The Foundation has maintained a carryover of distributions in excess of full-payment period minimum amounts for at least the past 5 years. Following are the distributable amounts under Section 4942(d) and the actual payments made for the past 5 years.

Date	Distributable Amount	Actual Payment
12/31/2008	\$ 2,762,257	\$ 2,014,405
12/31/2007	3,130,974	2,949,153
12/31/2006	2,828,034	2,255,722
12/31/2005	2,597,666	3,632,956
12/31/2004	2,343,336	2,738,184
12/31/2003	2,167,559	2,721,083

2004 Set Aside Amounts

In 2004, The H&R Block Foundation set aside \$700,000 in contributions to The Nelson Gallery Foundation. In 2005-2008 \$600,000 was of the contribution was paid. The prior year payments and current year payment was used to support the inaugural exhibition of the Block Building by presenting the Henry and Marion Bloch impressionist exhibit and to support educational programs and community outreach. The amounts set aside for The Nelson Gallery Foundation's contributions was paid in full as of December 31, 2009.

Amount Set Aside in 2004	\$ 700,000
Amount Paid in 2005—Subtracted from 2005 Year Grants Paid	(150,000)
Amount Paid in 2006—Subtracted from Current Year Grants Paid	(150,000)
Amount Paid in 2007—Subtracted from Current Year Grants Paid	(150,000)
Amount Paid in 2008—Subtracted from Current Year Grants Paid	(150,000)
Amount Paid in 2009—Subtracted from Current Year Grants Paid	(100,000)
Remaining Balance of Funds Set Aside in 2004	<u>\$ -</u>

Reconciliation of Part XII Line 3(b):

2009 Funds Set Aside	\$ -
2009 Grant Payments associated with Funds Set Aside in 2004	(100,000)
2009 Grant Payments associated with Funds Set Aside in 2005	(100,000)
Net Adjustment to Current Year Grant Payments	<u>\$ (200,000)</u>

The H&R Block Foundation
23-7378232
2009
Form 990-PF
Schedule 5
Part IV, Capital Gains And Losses, Line 1

Company	Shares/ Rate	How Acquired	Date Acquired	Date Sold	Proceeds	Adjusted Basis	Gain (Loss) On Sale
Russell 3000 Index	Various	Purchase	Various	Various		23,504	(23,504) ST
Russell 3000 Index	Various	Purchase	Various	Various		10,546	(10,546) LT
Archipelago	Various	Purchase	Various	Various	114,687		114,687 LT
Dimensional	Various	Purchase	Various	Various	59,460		59,460 LT
Russell Passive Bond Market	Various	Purchase	Various	Various	67,314		67,314 ST
Russell Passive Bond Market	Various	Purchase	Various	Various	246,959		246,959 LT
Russell MSCI	Various	Purchase	Various	Various	637		637 ST
Russell MSCI	Various	Purchase	Various	Various		7,364	(7,364) LT
Bank of America Cap Mgt Funds I, LLC	Various	Purchase	Various	Various	11,250		11,250 ST
Bank of America Cap Mgt Funds I, LLC	Various	Purchase	Various	Various		170,726	(170,726) LT
Acadian International Small Cap Fund	Various	Purchase	Various	Various		79,067	(79,067) ST
Acadian International Small Cap Fund	Various	Purchase	Various	Various		211,233	(211,233) LT
Ironwood	Various	Purchase	Various	Various	300		300 ST
Ironwood	Various	Purchase	Various	Various		158,440	(158,440) LT
Vanguard International Value Fund	Various	Purchase	Various	Various		50,047	(50,047) ST
Vanguard International Value Fund	Various	Purchase	Various	Various		1,140,838	(1,140,838) LT
WTC-CTF Real Estate Sec	Various	Purchase	Various	Various		322,304	(322,304) ST
WTC-CTF Real Estate Sec	Various	Purchase	Various	Various		2,236,656	(2,236,656) LT
Total					500,607	4,410,725	(3,910,118)
Realized Gain Recon:					Book	Tax Adj	Total Tax
Russell 3000 Index					(17)	(34,033)	(34,050)
Russell Passive Bond Market					59,911	254,362	314,273
Russell MSCI					-	(6,727)	(6,727)
Bank of America Cap Mgt Funds I, LLC					3,843	(163,319)	(159,476)
Acadian International Small Cap Fund					(274,827)	(15,473)	(290,300)
Dimensional Emerging Markets					59,460	0	59,460
Vanguard International Value Fund					(1,190,885)	0	(1,190,885)
Ironwood					(158,140)	0	(158,140)
Archipelago					114,687	0	114,687
WTC-CTF Real Estate Sec					(19,611)	(2,539,349)	(2,558,960)
Total					(1,405,579)	(2,504,539)	(3,910,118)

The H & R Block Foundation

Payments Made Year-to-Date

December 31, 2009

12/31/2009

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Acadia University	Hillary Beuschel	\$200.00 3662 10/15/2009	\$200.00
<i>Grant for Match [436]</i>			
Accessible Arts, Inc. English, Martin 1100 State Ave. Kansas City, KS 66102 <i>funds to replace damaged and deteriorating asbestos tile from a room in the organization's facility</i>	Robert Bloch	\$2,500.00 3398 2/9/2009	\$2,500.00
Actors Theatre of Phoenix Black, Erica PO Box 1924 Phoenix, AZ 85001 <i>RSM Bloch Award Winner 2009 George Cohen</i>	Hillary Beuschel	\$5,000.00 3632 9/28/2009	\$5,000.00
AdHoc Group Against Crime Brooks, Alvin 3116 Prospect Kansas City, MO 64128 <i>funds to support ongoing programs and operations</i>	Carey Wilkerson Looney	\$5,000.00 3538 4/22/2009	\$5,000.00
Alleman High School	Hillary Beuschel	\$1,000.00 3283 1/8/2009	\$1,000.00
<i>Grant for Match [268]</i>			
Alleman High School	Hillary Beuschel	\$1,000.00 3539 5/11/2009	\$1,000.00
<i>Grant for Match [390]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Alliance on Aging Silva, Sandra 6025 Martway, Suite 112 Shawnee Mission, KS 66202 <i>funds to purchase Donor Perfect fundraising software</i>	Carey Wilkerson Looney	\$4,675 00 3493 4/22/2009	\$4,675 00
American Cancer Society - Fox Valley Regional Office Nelson, Kerl 143 First Street Suite 100 Batavia, IL 60510-3102 <i>Bloch Community Service Award Sophie Mitzel (Tax)</i>	Hillary Beuschel	\$1,000 00 3634 9/28/2009	\$1,000 00
American Cancer Society Thompson, Tondi 3727 Blackhawk Rd Rock Island, IL 61201 <i>Cash for Champions Tasha Reisz-Serrano (RSM)</i>	Hillary Beuschel	\$100 00 3633 9/28/2009	\$100 00
American Red Cross <i>Funds to support H&R Block associate volunteer projects during 2009</i>	Carey Wilkerson Looney	\$2,500 00 3494 4/22/2009	\$2,500 00
American Royal Association McNair, Jim 1701 American Royal Court Kansas City, MO 64102 <i>2009 IJ Mnookin Award Winner Barbara Herrin</i>	Hillary Beuschel	\$1,000 00 3663 10/15/2009	\$1,000 00
The Arts Council of Metropolitan Kansas City Ellison, Kelly 906 Grand Avenue, Suite 10B Kansas City, MO 64106 <i>funds to support phase II of the Arts Council's web site upgrade</i>	David Miles	\$5,000 00 3739 12/10/2009	\$5,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Arts Incubator of Kansas City Becker, Jeff 115 West 18th Street Kansas City, MO 64108 <i>funds to purchase computers and color printer for business library</i>	Robert Bloch	\$4,490 00 3567 6/24/2009	\$4,490 00
Arts Partners in Kansas City Brownlee, Harlan 5601 Wyandotte Kansas City, MO 64113 <i>funds to support ongoing operation of the Arts Partners program during the 2008 - 2009 school year coded as OPIY during 2008</i>	Robert Bloch	\$12,000 00 3284 1/8/2009	\$12,000 00
Arts Partners in Kansas City Crosby-Huwar, Debra 5601 Wyandotte Kansas City, MO 64113 <i>funds to support ongoing operation of the Arts Partners program</i>	Robert Bloch	\$12,000 00 3687 11/3/2009	\$12,000 00
ArtsTech Sullivan, Dave 1522 Holmes Street Kansas City, MO 64108 <i>funds to purchase supplies for art programs</i>	Robert Bloch	\$10,000 00 3635 9/28/2009	\$10,000 00
Avery Coonley School <i>Grant for Match [435]</i>	Hillary Beuschel	\$1,000 00 3664 10/15/2009	\$1,000 00
Ball State University Foundation <i>Grant for Match [420]</i>	Hillary Beuschel	\$250 00 3623 9/2/2009	\$250.00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Baltimore County Police Foundation	Hillary Beuschel	\$100.00	\$100 00
Heggs, Deborah		3450	
PO Box 9846		3/5/2009	
Loch Raven, MD 21284-9846			
<i>Cash for Champions George Garrett (RSM)</i>			
The Barnesville School	Hillary Beuschel	\$1,000 00	\$1,000 00
		3344	
		1/29/2009	
<i>Grant for Match [275]</i>			
Baruch College	Hillary Beuschel	\$1,000 00	\$1,000 00
		3688	
		11/3/2009	
<i>Grant for Match [441]</i>			
Belles of the American Royal	Hillary Beuschel	\$200 00	\$200 00
Minette, Laura		3434	
845 Meadow Lane North		2/19/2009	
Golden Valley, MN 55422			
<i>Cash for Champions Kathie Manda (WHQ)</i>			
Benilde Hall	Carey Wilkerson Looney	\$12,000 00	\$12,000 00
Jewell, Kent		3636	
3220 East 23rd Street		9/28/2009	
Kansas City, MO 64127			
<i>funds to support the street outreach program</i>			
Bethel College	Hillary Beuschel	\$1,000 00	\$1,000 00
		3345	
		1/29/2009	
<i>Grant for Match [276]</i>			
Bethel College	Hillary Beuschel	\$1,000 00	\$1,000 00
		3399	
		2/9/2009	
<i>Grant for Match [334]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Big Brothers\Big Sisters, Kansas City Lawrence, Micheal 3908 Washington Kansas City, MO 64111 <i>funds to support outsourcing of Human Resource functions and the AIM information management system</i>	Carey Wilkerson Looney	\$20,000 00 3568 6/24/2009	\$20,000 00
Binghamton University <i>Grant for Match [336]</i>	Hillary Beuschel	\$100 00 3400 2/9/2009	\$100 00
Binghamton University <i>Grant for Match [492]</i>	Hillary Beuschel	\$1,000 00 3787 12/22/2009	\$1,000 00
Blue Hills Community Services Corporation Bussinger, Joanne 3101 Broadway, Suite 120 Kansas City, MO 64111 <i>funds to support the building of a community garden</i>	David Miles	\$2,500 00 3788 12/22/2009	\$2,500 00
Boston College <i>Grant for Match [266]</i>	Hillary Beuschel	\$100.00 3285 1/8/2009	\$100 00
Boston College <i>Grant for Match [286]</i>	Hillary Beuschel	\$500 00 3346 1/29/2009	\$500 00
Boys and Girls Clubs of Greater Kansas City Smith, David 6301 Rockhill Road Kansas City, MO 64131 <i>funds to support completion of construction/renovation of the JD Wagner BGC at 2405 Elmwood</i>	Carey Wilkerson Looney	\$25,000.00 3740 12/10/2009	\$25,000.00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Bradley University	Hillary Beuschel	\$250.00	\$250.00
		3610	
		8/14/2009	
<i>Grant for Match [414]</i>			
Brookside Irish Festival Inc	Hillary Beuschel	\$200 00	\$200 00
Regan, Daniel		3541	
4049 Central		5/11/2009	
Kansas City, MO 64111			
<i>Cash for Champions Natalie Smith</i>			
Bryant University	Hillary Beuschel	\$150 00	\$150 00
		3497	
		4/22/2009	
<i>Grant for Match [384]</i>			
Buena Vista University	Hillary Beuschel	\$1,000 00	\$1,000 00
Nothwehr, Teresa		3286	
610 W Fourth Street		1/8/2009	
Staim Lake, IA 50588			
<i>Grant for Match [242]</i>			
Cabot Westside Clinic	Carey Wilkerson Looney	\$25,000 00	\$25,000 00
Levin, Liz		3637	
2121 Summit		9/28/2009	
Kansas City, MO 64108			
<i>funds to support expansion of the organization's parking lot</i>			
Calvary Bible College	Hillary Beuschel	\$100 00	\$100 00
		3435	
		2/19/2009	
<i>Grant for Match [356]</i>			
Camp Del-Ja-Ri	Hillary Beuschel	\$200 00	\$200 00
Grady, Berdine		3789	
618 Brookview Drive		12/22/2009	
Greenwood, IN 46142			
<i>Cash for Champions Deb Hein (RSM)</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Camp Fire USA, Heartland Council	Carey Wilkerson Looney	\$1,500 00 3475 4/6/2009	\$1,500.00
<i>Funds to support H&R Block associate volunteer projects during 2009</i>			
Camps for Kids McCue, Steve 1080 Washington Kansas City, MO 64105	Carey Wilkerson Looney	\$6,000 00 3498 4/22/2009	\$6,000 00
<i>funds to support camperships for low-income children during summer 2009</i>			
Canisius College	Hillary Beuschel	\$1,000.00 3288 1/8/2009	\$1,000 00
<i>Grant for Match [269]</i>			
Capital University	Hillary Beuschel	\$500.00 3741 12/10/2009	\$500 00
<i>Grant for Match [484]</i>			
Carleton College	Hillary Beuschel	\$250 00 3625 9/2/2009	\$250 00
<i>Grant for Match [417]</i>			
Carnegie Mellon University	Hillary Beuschel	\$250.00 3743 12/10/2009	\$250 00
<i>Grant for Match [468]</i>			
Jackson County CASA Gershun, Martha 625 East 26th Street Kansas City, MO 64108	Carey Wilkerson Looney	\$10,000 00 3759 12/10/2009	\$10,000 00
<i>funds to support ongoing programs and operations</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
CASA of Johnson & Wyandotte Counties Rice, Lois Cloverleaf Office Park 6901 Shawnee Mission Parkway Suite 112 Overland Park, KS 66202 <i>funds to support ongoing programs and operations coded as OPIY during 2008</i>	Carey Wilkerson Looney	\$4,000 00 3340 1/8/2009	\$4,000 00
CASA of Johnson & Wyandotte Counties Rice, Lois Cloverleaf Office Park 6901 Shawnee Mission Parkway Suite 112 Overland Park, KS 66202 <i>funds to support ongoing programs and operations</i>	Carey Wilkerson Looney	\$4,000 00 3744 12/10/2009	\$4,000 00
Catholic Charities of Northeast Kansas Doyle, Wendy 9720 West 87th Street Overland Park, KS 66212 <i>Funds to support ongoing operation of the Family Support Centers</i>	Carey Wilkerson Looney	\$25,000 00 3500 4/22/2009	\$25,000 00
Central Methodist University <i>Grant for Match [287]</i>	Hillary Beuschel	\$1,000 00 3347 1/29/2009	\$1,000 00
Central Washington University <i>Grant for Match [272]</i>	Hillary Beuschel	\$750 00 3290 1/8/2009	\$750 00
Central Washington University <i>Grant for Match [288]</i>	Hillary Beuschel	\$1,000 00 3348 1/29/2009	\$1,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Central Washington University	Hillary Beuschel	\$1,000 00 3790 12/22/2009	\$1,000 00
<i>Grant for Match [493]</i>			
Chameleon Theatre Inc. Merrill, Hugh 2025 Tracy Avenue Kansas City, MO 64108 <i>funds to purchase a portable dance floor, tables, and chairs for youth arts programs</i>	Robert Bloch	\$6,000.00 3712 11/16/2009	\$6,000 00
Charlotte Street Foundation Hughes, David P O Box 10263 Kansas City, MO 64171 <i>funds to support the Charlotte Street awards program for individual visual artists working in the Kansas City area</i>	Robert Bloch	\$5,000 00 3690 11/3/2009	\$5,000 00
Child Abuse Prevention Association, Inc. Issa, Jeanetta 503 E 23rd Street Independence, MO 64055 <i>funds to support the purchase of an IT network printer for the organization</i>	Carey Wilkerson Looney	\$8,000 00 3639 9/28/2009	\$8,000 00
Children's Campus of Kansas City Staker, Martha Tower II, Suite 900 400 State Avenue Kansas City, KS 66101 <i>funds to support the Children's Campus of Kansas City capital campaign</i>	David Miles	\$25,000 00 3452 3/5/2009	\$25,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Children's Center for the Visually Impaired Dolemba, Mary Lynne 3101 Main Street Kansas City, MO 64111 <i>funds to support ongoing operation of the Infant Intervention program</i>	Carey Wilkerson Looney	\$6,000 00 3570 6/24/2009	\$6,000 00
Children's Hospital Association Inc. Hoen, Dorothy 345 N Smith Avenue St. Paul, MN 55102 <i>Cash for Champions Deborah Peters Splett</i>	Hillary Beuschel	\$100 00 3291 1/8/2009	\$100 00
Children's Mercy Hospital Fehr, Terri 2401 Gillham Road Kansas City, MO 64108 <i>June 2006- grant redirected to support the Don Chisholm Hospital Hill Center</i>	Carey Wilkerson Looney	\$50,000 00 3501 4/22/2009	\$50,000 00
Christ the King School <i>Grant for Match [423]</i>	Hillary Beuschel	\$1,000 00 3640 9/28/2009	\$1,000 00
CHWC, Inc. Carroll, Susan 2 South 14th Street Kansas City, KS 66102 <i>funds to support ongoing operation of the Homebuyer Assistance and Preservation program</i>	David Miles	\$5,000 00 3602 7/21/2009	\$5,000 00
Scholarship America Weber, Barb One Scholarship Way P O Box 297 St Peter, MN 56082 <i>Funds to support The H & R Block Foundation Scholarship program for the 2009-2010 school year</i>	Hillary Beuschel	\$207,315 00 3598 7/9/2009	\$207,315 00

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
Scholarship America	Hillary Beuschel	\$19,920 00	\$19,920.00
Bachtie, Brandon		3682	
One Scholarship Way		10/15/2009	
P O. Box 297			
St Peter, MN 56082			
<i>Funds to support The H & R Block Foundation</i>			
<i>Scholarship program for the 2010-2011 school year</i>			
City Vision Ministries	David Miles	\$15,000 00	\$15,000 00
Harvey, John		3502	
726 Armstrong Avenue		4/22/2009	
Kansas City, KS 66101			
<i>funds to support design and construction of the 1210</i>			
<i>Energy House</i>			
Clarke College	Hillary Beuschel	\$300 00	\$300 00
		3401	
		2/9/2009	
<i>Grant for Match [333]</i>			
Clay County Clothes Closet	Carey Wilkerson Looney	\$2,000 00	\$2,000 00
Pfaff, Art		3476	
P O Box 46625		4/6/2009	
Kansas City, MO 64188			
<i>funds to support ongoing programs and operations</i>			
Coleman A. Young Foundation	Hillary Beuschel	\$5,000.00	\$5,000 00
		3713	
		11/16/2009	
<i>Grant for Match [456]</i>			
The College of William and Mary	Hillary Beuschel	\$1,000 00	\$1,000 00
		3402	
		2/9/2009	
<i>Grant for Match [335]</i>			

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
Commonwealth Cats, Inc. Magesky, Sheila P O. Box 26 Peabody, MA 01960 <i>Cash for Champions Teresa Sarandrea</i>	Hillary Beuschel	\$200 00 3403 2/9/2009	\$200 00
Community LINC Gray, Laura 4012-14 Troost Kansas City, MO 64110 <i>funds to provided required match for HUD funding in 2009</i>	Carey Wilkerson Looney	\$20,000 00 3571 6/24/2009	\$20,000 00
Community Services League Levine, Michael 300 West Maple P.O Box 4178 Independence, MO 64050 <i>funds to support emergency assistance and direct assistance programs for homeless and low-income individuals in eastern Jackson County, Missouri</i>	Carey Wilkerson Looney	\$25,000 00 3641 9/28/2009	\$25,000 00
Community Theatre of Cedar Rapids Prince, Casey 102 Third Street SE Cedar Rapids, IA 52401 <i>Cash for Champions Matt Stoner (RSMM)</i>	Hillary Beuschel	\$100 00 3292 1/8/2009	\$100 00
Compass Inc Seaver, Julie 201 North Dixie Hwy Lake Worth, FL 33460 <i>Cash for Champions Dana Perez (RSM)</i>	Hillary Beuschel	\$200 00 3642 9/28/2009	\$200 00
Concordia College <i>Grant for Match [289]</i>	Hillary Beuschel	\$1,000 00 3349 1/29/2009	\$1,000.00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Connecticut College	Hillary Beuschel	\$100.00	\$100 00
		3404	
		2/9/2009	
<i>Grant for Match [347]</i>			
Contra Costa Civic Theatre	Hillary Beuschel	\$200 00	\$200 00
Winter, Holly		3572	
951 Pomona Ave		6/24/2009	
El Cerrito, CA 94530			
<i>Cash for Champions Sierra Liebman</i>			
The Coterie	Robert Bloch	\$8,000 00	\$8,000 00
Pelster, Joette		3330	
2450 Grand		1/8/2009	
Kansas City, MO 64108			
<i>funds to support ongoing programs and operations</i>			
<i>coded as OPIY during 2008</i>			
The Coterie	Robert Bloch	\$8,000.00	\$8,000 00
Pelster, Joette		3804	
2450 Grand		12/22/2009	
Kansas City, MO 64108			
<i>funds to support ongoing programs and operations</i>			
<i>during the 2009 - 2010 performance season</i>			
Covenant House	Hillary Beuschel	\$2,500 00	\$2,500 00
		3746	
		12/10/2009	
<i>Grant for Match [478]</i>			
Cristo Rey Kansas City	Carey Wilkerson Looney	\$25,000 00	\$25,000.00
Stith, Andrew		3643	
211 West Linwood Blvd		9/28/2009	
Kansas City, MO 64111			
<i>funds to support the college readiness seminar series</i>			
<i>during the 2009 - 2010 school year</i>			

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
DeLa Salle Education Center Dougherty, Jim 3740 Forest Kansas City, MO 64109 <i>funds to support the Leadership Academy and Recovery Program for students at risk of suspension, expulsion, or dropping out</i>	Carey Wilkerson Looney	\$20,000 00 3504 4/22/2009	\$20,000 00
DeMatha Catholic High School <i>Grant for Match [433]</i>	Hillary Beuschel	\$600 00 3666 10/15/2009	\$600 00
DePaul University <i>Grant for Match [290]</i>	Hillary Beuschel	\$250 00 3350 1/29/2009	\$250 00
DePaul University <i>Grant for Match [418]</i>	Hillary Beuschel	\$150 00 3626 9/2/2009	\$150 00
DePaul University <i>Grant for Match [424]</i>	Hillary Beuschel	\$750 00 3644 9/28/2009	\$750 00
DePaul University <i>Grant for Match [452]</i>	Hillary Beuschel	\$500 00 3714 11/16/2009	\$500.00
DePaul University <i>Grant for Match [458]</i>	Hillary Beuschel	\$100 00 3715 11/16/2009	\$100 00

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
DePaul University	Hillary Beuschel	\$1,000 00	\$1,000 00
		3748	
		12/10/2009	
<i>Grant for Match [485]</i>			
Developing Potential, Inc.	Hillary Beuschel	\$14,044 00	\$14,044 00
Case, Rebecca		3749	
120 West Walnut Street		12/10/2009	
Independence, MO 64050-3846			
<i>funds to purchase an online database and purchase notebooks for the organization's staff for mobile entry of program data</i>			
Don Bosco Community Center	Carey Wilkerson Looney	\$15,000 00	\$15,000 00
Wright, Katie		3645	
531 Garfield		9/28/2009	
Kansas City, MO 64124			
<i>funds to support the Work Empowerment Program</i>			
Donnelly College	Carey Wilkerson Looney	\$22,191 00	\$22,191 00
		3556	
		5/29/2009	
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			
Donnelly College	David Miles	\$15,000 00	\$15,000 00
LaNasa, Steve		3573	
608 N 18th Street		6/24/2009	
Kansas City, KS 66102			
<i>funds to support the English as a Second Language program</i>			
Donnelly College	Carey Wilkerson Looney	\$30,559 00	\$30,559 00
		3750	
		12/10/2009	
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Dowling Catholic High School	Hillary Beuschel	\$1,000.00 3293 1/8/2009	\$1,000 00
<i>Grant for Match [256]</i>			
Dowling Catholic High School	Hillary Beuschel	\$1,000 00 3716 11/16/2009	\$1,000 00
<i>Grant for Match [465]</i>			
Downtown Council of Kansas City, Missouri O'Byrne, Sean 911 Main, Suite 110 Kansas City, MO 64105 <i>funds to support capital improvements for the Downtown Community Services Center</i>	Carey Wilkerson Looney	\$10,000 00 3558 5/29/2009	\$10,000 00
Downtown Outreach Lyon, Lauien 1307 Holmes Kansas City, MO 64106 <i>funds to purchase personal grooming and hygiene items for distribution to homeless and fans for the lunchroom area of the pantry</i>	Carey Wilkerson Looney	\$1,000 00 3751 12/10/2009	\$1,000 00
Drake University	Hillary Beuschel	\$100 00 3574 6/24/2009	\$100 00
<i>Grant for Match [406]</i>			
Drake University	Hillary Beuschel	\$1,000 00 3752 12/10/2009	\$1,000.00
<i>Grant for Match [475]</i>			
Duke University	Hillary Beuschel	\$100 00 3294 1/8/2009	\$100 00
<i>Grant for Match [241]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
East Carolina University	Hillary Beuschel	\$250 00 3407 2/9/2009	\$250 00
<i>Grant for Match [338]</i>			
East Carolina University	Hillary Beuschel	\$250 00 3408 2/9/2009	\$250 00
<i>Grant for Match [337]</i>			
East Carolina University	Hillary Beuschel	\$250 00 3406 2/9/2009	\$250 00
<i>Grant for Match [339]</i>			
East Carolina University	Hillary Beuschel	\$500 00 3405 2/9/2009	\$500 00
<i>Grant for Match [340]</i>			
East Carolina University	Hillary Beuschel	\$441 00 3453 3/5/2009	\$441 00
<i>Grant for Match [366]</i>			
El Centro, Inc. Jarmillo, Mary Lou 650 Minnesota Avenue Kansas City, KS 66101 <i>funds to support ongoing programs and operations</i>	Carey Wilkerson Looney	\$10,000 00 3575 6/24/2009	\$10,000 00
Elder Services, Inc. Fulton, B Allen 1556 S 1st Ave STE A Iowa City, IA 52240 <i>Cash for Champions Stan Miller (RSM)</i>	Hillary Beuschel	\$200 00 3791 12/22/2009	\$200 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Emerson College	Hillary Beuschel	\$100 00 3351 1/29/2009	\$100 00
<i>Grant for Match [292]</i>			
Emerson School	Hillary Beuschel	\$1,000 00 3691 11/3/2009	\$1,000 00
<i>Grant for Match [442]</i>			
Emmanuel College	Hillary Beuschel	\$150 00 3505 4/22/2009	\$150 00
<i>Grant for Match [379]</i>			
Episcopal Community Services	Carey Wilkerson Looney	\$2,500 00 3717 11/16/2009	\$2,500 00
<i>Funds to support H&R Block associate volunteer projects during 2009</i>			
Equal Justice America	Hillary Beuschel	\$200 00 3477 4/6/2009	\$200 00
<i>Grant for Match [372]</i>			
Family Health Care	Hillary Beuschel	\$900 00 3692 11/3/2009	\$900 00
<i>Grant for Match [448]</i>			
Family Health Care Lee, Sharon 340 Southwest Blvd Kansas City, KS 66103 <i>funds to purchase digital radiography equipment</i>	Carey Wilkerson Looney	\$38,700 00 3777 12/10/2009	\$38,700.00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Francis Child Development Institute Kitzi, Gerard MCC- Penn Valley 3201 Southwest Trafficway Kansas City, MO 64111 <i>funds to support the Missouri Youth Worker Pathways project</i>	Carey Wilkerson Looney	\$20,000 00 3506 4/22/2009	\$20,000 00
Friends of Chamber Music Beebe, Kate 4635 Wyandotte Ste. 201 Kansas City, MO 64112-1542 <i>funds to support ongoing programs and operations coded as OPIY during 2008</i>	Robert Bloch	\$13,500 00 3295 1/8/2009	\$13,500 00
Friends of Chamber Music <i>Grant for Match [381]</i>	Hillary Beuschel	\$2,000 00 3507 4/22/2009	\$2,000 00
Friends of Chamber Music Beebe, Kate 4635 Wyandotte Ste. 201 Kansas City, MO 64112-1542 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$13,500 00 3792 12/22/2009	\$13,500 00
Friends of the Parks Tranter, Emma 17 N State Street Suite 1450 Chicago, IL 60602 <i>Cash for Champions Matthew Haas</i>	Hillary Beuschel	\$200 00 3409 2/9/2009	\$200 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Friends of the Zoo Berger, Laura 6800 Zoo Drive Kansas City, MO 64132 <i>funds to support renovation of the Peacock Cafe</i>	David Miles	\$50,000 00 3646 9/28/2009	\$50,000 00
Galesburg High School Band Parents Brady, Rhonda PO Box 298 Galesburg, IL 61402-0298 <i>Cash for Champions Nancy Reed (RSMM)</i>	Hillary Beuschel	\$100 00 3296 1/8/2009	\$100 00
George Washington University <i>Grant for Match [307]</i>	Hillary Beuschel	\$100 00 3352 1/29/2009	\$100 00
Georgetown University <i>Grant for Match [345]</i>	Hillary Beuschel	\$1,000 00 3410 2/9/2009	\$1,000 00
Gillis Center Biggs, John 8150 Wornall Road Kansas City, MO 64114 <i>funds to support curriculum upgrades for students attending Gillis Alternative School</i>	Carey Wilkerson Looney	\$11,326.14 3647 9/28/2009	\$11,326 14
Girl Scouts of Greater Los Angeles Pappas, Myrina 14799 San Felicino La Mirada, CA 90638 <i>Cash for Champions Barbara Fortune</i>	Hillary Beuschel	\$200 00 3576 6/24/2009	\$200 00
The Gooden School <i>Grant for Match [342]</i>	Hillary Beuschel	\$500 00 3411 2/9/2009	\$500 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Gordon Parks Elementary School	Hillary Beuschel	\$200 00 3297 1/8/2009	\$200 00
<i>Grant for Match [250]</i>			
Gordon Parks Elementary School	Hillary Beuschel	\$200 00 3544 5/11/2009	\$200 00
<i>Grant for Match [389]</i>			
Gordon Parks Elementary School	Hillary Beuschel	\$200 00 3718 11/16/2009	\$200.00
<i>Grant for Match [453]</i>			
Greater Kansas City Community Foundation	Hillary Beuschel	\$9,000 00 3298 1/8/2009	\$9,000 00
<i>Grant for Match [265]</i>			
Greater Kansas City Community Foundation Porter, Julie 3535 Broadway, Suite 200 Kansas City, MO 64111-2545 <i>funds to support Phase II of the Neighborhoods NOW initiative</i>	David Miles	\$100,000 00 3318 1/8/2009	\$100,000 00
Greater Kansas City Community Foundation	Hillary Beuschel	\$8,292 00 3719 11/16/2009	\$8,292.00
<i>Grant for Match [457]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Greater Kansas City Hispanic Scholarship Fund Murgia, Ramon 1055 Broadway Suite 130 Kansas City, MO 64105 <i>funds to support scholarships for Hispanic students attending colleges and universities-coded as OPIY during 2008</i>	Carey Wilkerson Looney	\$10,000 00 3299 1/8/2009	\$10,000 00
Greater Kansas City Hispanic Scholarship Fund Murgia, Ramon 1055 Broadway Suite 130 Kansas City, MO 64105 <i>funds to provide scholarships for area Hispanic students</i>	Carey Wilkerson Looney	\$10,000 00 3793 12/22/2009	\$10,000 00
Guadalupe Center, Inc. Medina, Cris 1015 Avenida Cesar E. Chavez Kansas City, MO 64108 <i>funds to support the CLAMECAC Nutrition program</i>	David Miles	\$25,000 00 3508 4/22/2009	\$25,000 00
Gustavus Adolphus College <i>Grant for Match [375]</i>	Hillary Beuschel	\$100.00 3509 4/22/2009	\$100 00
Hall Center for the Humanities <i>Grant for Match [386]</i>	Hillary Beuschel	\$3,000 00 3510 4/22/2009	\$3,000 00
Harriman-Jewell Series Hinkle, Kimberly William Jewell College 500 College Hill, Box 1015 Liberty, MO 64068 <i>funds to support ongoing programs and operations during the 2009 - 2010 performance season</i>	Robert Bloch	\$8,500 00 3693 11/3/2009	\$8,500 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Harry S. Truman Library and Museum	Hillary Beuschel	\$1,000 00 3511 4/22/2009	\$1,000 00
<i>Grant for Match [383]</i>			
Harvard University	Hillary Beuschel	\$600 00 3512 4/22/2009	\$600 00
<i>Grant for Match [380]</i>			
Harvard University	Hillary Beuschel	\$3,000 00 3545 5/11/2009	\$3,000 00
<i>Grant for Match [397]</i>			
Harvesters	Hillary Beuschel	\$5,000 00 3342 1/8/2009	\$5,000 00
<i>Grant for Match [245]</i>			
Harvesters Haren, Karen 301 E. Armour Blvd , Suite 460 Kansas City, MO 64111 <i>funds to support the Building Enhancement and Program Expansion Initiative</i>	David Miles	\$50,000 00 3341 1/8/2009	\$50,000 00
Harvesters Haren, Karen 301 E. Armour Blvd , Suite 460 Kansas City, MO 64111 <i>funds to support emergency needs of individuals in the greater Kansas City area</i>	Carey Wilkerson Looney	\$25,000 00 3437 2/19/2009	\$25,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Health Partnership Clinic of Johnson County Lowe, Amanda 7171 West 95th Street, Suite 100 Overland Park, KS 66212 <i>funds to support medications for uninsured persons living in Johnson County, Kansas</i>	Carey Wilkerson Looney	\$15,000 00 3753 12/10/2009	\$15,000 00
Heart of America Community AIDS Partnership Dennis, Alinda 1080 Washington Kansas City, MO 64105-2216 <i>funds to support collaborative grant making activities for AIDS service organizations during 2009</i>	Carey Wilkerson Looney	\$10,000.00 3513 4/22/2009	\$10,000 00
Heart to Heart International North, Jon 401 South Clairborne Suite 302 Olathe, KS 66062 <i>funds to purchase school supplies for the Heart to Heart School Packs program (formerly Project SOS)</i>	Carey Wilkerson Looney	\$5,000 00 3603 7/21/2009	\$5,000 00
Heartland Alliance for Human Needs & Human Rights Mohn, Sid 208 S LaSalle Street Suite 1818 Chicago, IL 60604 <i>Cash for Champions Michael Tapia (RSM)</i>	Hillary Beuschel	\$200 00 3667 10/15/2009	\$200 00
The Helping Hand of Goodwill Industries Jones, Larry 1817 Campbell Kansas City, MO 64108 <i>funds to support materials and supplies for the Job Hunter's program</i>	Carey Wilkerson Looney	\$15,000 00 3577 6/24/2009	\$15,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Higher M-Pact Flowers, Tyone P O Box 11718 Kansas City, MO 64138 <i>funds to support the Leaders of Tomorrow program</i>	Carey Wilkerson Looney	\$5,000 00 3514 4/22/2009	\$5,000 00
Hilbert College <i>Grant for Match [469]</i>	Hillary Beuschel	\$1,000 00 3754 12/10/2009	\$1,000 00
Hillcrest Transitional Housing Cooper, Scott 216 South Jewell Street Liberty, MO 64068 <i>funds to support the Circle of Hope capital campaign</i>	David Miles	\$25,000 00 3579 6/24/2009	\$25,000 00
Holy Cross High School <i>Grant for Match [371]</i>	Hillary Beuschel	\$100 00 3478 4/6/2009	\$100 00
Holy Cross High School <i>Grant for Match [476]</i>	Hillary Beuschel	\$250 00 3756 12/10/2009	\$250 00
The Hugh O'Brian Youth Foundation Nofsinger, William 10880 Wilshire Boulevard Room 1500 Los Angeles, CA 90024 <i>Cash for Champions Dara Griffith -- Restricted to Illinois</i>	Hillary Beuschel	\$200 00 3560 5/29/2009	\$200 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Hugh O'Brian Youth Leadership of New Hampshire Hogshed, Anne PO Box 472 Northwood, NH 03261 <i>Cash for Champions Benjamin Leavitt</i>	Hillary Beuschel	\$200 00 3413 2/9/2009	\$200 00
Illinois State University Foundation <i>Grant for Match [293]</i>	Hillary Beuschel	\$500 00 3353 1/29/2009	\$500 00
Illinois State University Foundation <i>Grant for Match [459]</i>	Hillary Beuschel	\$500 00 3721 11/16/2009	\$500 00
Immanuel Lutheran High School <i>Grant for Match [359]</i>	Hillary Beuschel	\$1,000 00 3438 2/19/2009	\$1,000 00
Immanuel Lutheran High School <i>Grant for Match [363]</i>	Hillary Beuschel	\$1,000 00 3454 3/5/2009	\$1,000 00
The Iowa Children's Museum Dunkhase, Deb 1451 Coral Ridge Ave Coralville, IA 52241 <i>Cash for Champions Barbara Murphy (RSM)</i>	Hillary Beuschel	\$200 00 3669 10/15/2009	\$200 00
Iowa State University <i>Grant for Match [263]</i>	Hillary Beuschel	\$1,000 00 3303 1/8/2009	\$1,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Iowa State University	Hillary Beuschel	\$200 00 3649 9/28/2009	\$200 00
<i>Grant for Match [427]</i>			
Iowa State University	Hillary Beuschel	\$250 00 3694 11/3/2009	\$250 00
<i>Grant for Match [439]</i>			
Jackson County Historical Society	Hillary Beuschel	\$200 00 3671 10/15/2009	\$200 00
<i>Grant for Match [434]</i>			
Japan America Society of Chicago Kono, Erika 20 N Clark #750 Chicago, IL 60602 <i>Cash for Champions Goran Lukic (RSMM)</i>	Hillary Beuschel	\$200 00 3305 1/8/2009	\$200 00
Jewish Family Services Goldman, Don 5801 West 115th Street, Suite 103 Overland Park, KS 66211-1824 <i>funds to support purchase and implementation of a computer-based, client information system</i>	Carey Wilkerson Looney	\$10,000 00 3356 1/29/2009	\$10,000 00
Johnson County Interfaith Hospitality Network Bradley-Geary, Heather 11503 Strang Line Road, Suite C Olathe, KS 66062 <i>funds to support homeless services for persons in Johnson County, Kansas</i>	Carey Wilkerson Looney	\$5,000 00 3517 4/22/2009	\$5,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Jumpstart for Young Children Cleveland, James 308 Congress Street, 6th Floor Boston, MA 002210 <i>funds to support implementation of a new curriculum for program enhancement</i>	Carey Wilkerson Looney	\$15,000 00 3761 12/10/2009	\$15,000 00
Junior Achievement of Middle America, Inc. <i>Funds to support H&R Block associate volunteer projects during 2009</i>	Carey Wilkerson Looney	\$6,000 00 3481 4/6/2009	\$6,000 00
Junior Achievement of Middle America, Inc. Dillane, Matt 4049 Pennsylvania Avenue, Suite 150 Kansas City, MO 64111-3006 <i>funds to support ongoing programs and operations</i>	Carey Wilkerson Looney	\$5,000 00 3651 9/28/2009	\$5,000 00
Junior League of Peoria Balkema, Julie 256 NE Randolph Peoria, IL 61602 <i>Cash for Champions Tenley Damrow</i>	Hillary Beuschel	\$100 00 3582 6/24/2009	\$100 00
Kansas Children's Service League Fried, SuEllen 4003 Homestead Drive Shawnee Mission, KS 66208 <i>funds to meet the terms of a 2009 UMB challenge grant to support development of Bullysafte USA</i>	Carey Wilkerson Looney	\$2,500 00 3762 12/10/2009	\$2,500 00
Kansas City Art Institute Collins, Kathleen 4415 Warwick Blvd Kansas City, MO 64111 <i>funds to support ongoing operation of the H&R Block Artspace during 2009</i>	Robert Bloch	\$16,500 00 3482 4/6/2009	\$16,500 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Kansas City Ballet Bentley, Jeffrey 1616 Broadway Kansas City, MO 64108-1208 <i>funds to support construction of a new facility and for future outreach and education programs</i>	Robert Bloch	\$50,000 00 3306 1/8/2009	\$50,000 00
Kansas City Ballet Bentley, Jeffrey 1616 Broadway Kansas City, MO 64108-1208 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$20,000 00 9/28/2009	\$20,000 00
Kansas City Ballet Bentley, Jeffrey 1616 Broadway Kansas City, MO 64108-1208 <i>funds to support construction of a new facility and for future outreach and education programs</i>	Robert Bloch	\$50,000 00 3763 12/10/2009	\$50,000 00
Kansas City Chamber Orchestra Sorrell, Bruce 11 East 40th Street Kansas City, MO 64111 <i>funds to support ongoing programs and operations during the 2009 -2010 performance seasons</i>	Robert Bloch	\$2,500.00 3764 12/10/2009	\$2,500 00
Kansas City Foundation for Higher Education <i>Grant for Match [385]</i>	Hillary Beuschel	\$2,500 00 3518 4/22/2009	\$2,500 00
Kansas City Free Health Clinic Wood, Sheridan Y 3515 Broadway Kansas City, MO 64111 <i>funds to support medications for uninsured persons in Jackson County, Missouri</i>	Carey Wilkerson Looney	\$15,000 00 3765 12/10/2009	\$15,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Kansas City Friends of Alvin Ailey Aiken, Tyrone 1714 East 18th Street Kansas City, MO 64108 <i>funds to support ongoing programs and operations coded as OPIY during 2008</i>	Robert Bloch	\$11,500 00 3307 1/8/2009	\$11,500 00
Kansas City Friends of Alvin Ailey Aiken, Tyrone 1714 East 18th Street Kansas City, MO 64108 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$11,500 00 3766 12/10/2009	\$11,500 00
The Kansas City Jazz Orchestra <i>Grant for Match [463]</i>	Hillary Beuschel	\$200 00 3724 11/16/2009	\$200 00
Kansas City Public Library Kemper, Crosby 14 West 10th Street Kansas City, MO 64105 <i>funds to support the hiring of a professional staff person for the H&R Block Business Information Center</i>	David Miles	\$25,000 00 3767 12/10/2009	\$25,000 00
Kansas City Repertory Theatre Lenahan, Carrie 4949 Cherry Kansas City, MO 64110-2499 <i>Funds to support construction and furnishings for the theatre located at the downtown H&R Block World Headquarters location</i>	David Miles	\$25,000 00 3519 4/22/2009	\$25,000 00
Kansas City Rescue Mission, Inc. Colaizzi, Joe 1520 Cherry Kansas City, MO 64108 <i>Cash for Champions Scott Ostrander</i>	Hillary Beuschel	\$200 00 3596 7/9/2009	\$200 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Kansas City Symphony	Hillary Beuschel	\$4,000 00 3520 4/22/2009	\$4,000 00
<i>Grant for Match [382]</i>			
Kansas City Symphony	Hillary Beuschel	\$2,000 00 3562 5/29/2009	\$2,000 00
<i>Grant for Match [399]</i>			
Kansas City Symphony Williams, Eric 1020 Central Suite 300 Kansas City, MO 64105-1672 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$22,500 00 3695 11/3/2009	\$22,500 00
Kansas State University Foundation	Hillary Beuschel	\$250 00 3308 1/8/2009	\$250 00
<i>Grant for Match [254]</i>			
Kansas State University Foundation	Hillary Beuschel	\$100 00 3521 4/22/2009	\$100 00
<i>Grant for Match [387]</i>			
Kansas State University Foundation	Hillary Beuschel	\$480 00 3583 6/24/2009	\$480 00
<i>Grant for Match [405]</i>			
The Kansas University Endowment Association	Hillary Beuschel	\$100 00 3309 1/8/2009	\$100 00
<i>Grant for Match [264]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
The Kansas University Endowment Association	Hillary Beuschel	\$2,000.00 3696 11/3/2009	\$2,000.00
<i>Grant for Match [446]</i>			
The Kansas University Endowment Association	Hillary Beuschel	\$1,000.00 3768 12/10/2009	\$1,000.00
<i>Grant for Match [479]</i>			
Kelsey Smith Foundation, Inc. Smith, Greg PO Box 40393 Overland Park, KS 66204 <i>IJ Mnookin Award Winner Barbara Herrin (2009)</i>	Hillary Beuschel	\$4,000.00 3674 10/15/2009	\$4,000.00
Kemper Museum of Contemporary Art Blackburn Cozad, Rachel 4420 Warwick Blvd Kansas City, MO 64111 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$9,000.00 3697 11/3/2009	\$9,000.00
KIPP Endeavor Academy Richard, Jon 2700 East 18th Street Kansas City, MO 64127 <i>funds to support increased math teacher salaries during the 2009 - 2010 school year</i>	Carey Wilkerson Looney	\$15,000.00 3523 4/22/2009	\$15,000.00
Lake Superior College Foundation	Hillary Beuschel	\$100.00 3769 12/10/2009	\$100.00
<i>Grant for Match [483]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Legal Aid of Western Missouri Carpenter, Kelly 1125 Grand, Suite 1900 Kansas City, MO 64106 <i>funds to support ongoing operation of the Economic Development Unit</i>	David Miles	\$20,000 00 3796 12/22/2009	\$20,000 00
Lewis University <i>Grant for Match [401]</i>	Hillary Beuschel	\$6,000 00 3563 5/29/2009	\$6,000 00
Lewis University <i>Grant for Match [473]</i>	Hillary Beuschel	\$6,000 00 3770 12/10/2009	\$6,000 00
Liberty Memorial Association Alexander, Brian 100 West 26th Street Kansas City, Missouri 64108 <i>funds to meet the terms of the We the People Challenge grant from the National Endowment for the Humanities</i>	Carey Wilkerson Looney	\$10,000 00 3606 7/21/2009	\$10,000 00
Local Initiatives Support Corporation - LISC Porter, Julie 3535 Broadway, Suite 200 Kansas City, MO 64111-2545 <i>funds to support Phase II of the Neighborhoods NOW initiative</i>	David Miles	\$100,000 00 3797 12/22/2009	\$100,000 00
Loras College <i>Grant for Match [273]</i>	Hillary Beuschel	\$250.00 3357 1/29/2009	\$250 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Loras College	Hillary Beuschel	\$1,000 00 3628 9/2/2009	\$1,000 00
<i>Grant for Match [416]</i>			
Lourdes High School	Hillary Beuschel	\$1,000 00 3311 1/8/2009	\$1,000 00
<i>Grant for Match [261]</i>			
Lourdes High School	Hillary Beuschel	\$1,000 00 3771 12/10/2009	\$1,000 00
<i>Grant for Match [480]</i>			
Loyola Blakefield	Hillary Beuschel	\$500 00 3698 11/3/2009	\$500 00
<i>Grant for Match [451]</i>			
Lyrice Opera Steinacker, Nancy 1029 Central Kansas City, MO 64105-1677 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$17,000 00 3699 11/3/2009	\$17,000 00
Manchester College Kin, Nancy P.O Box 365 North Manchester, IN 46962-0365 <i>Grant for Match [243]</i>	Hillary Beuschel	\$500 00 3312 1/8/2009	\$500 00
Marian Central Catholic High School	Hillary Beuschel	\$1,000 00 3676 10/15/2009	\$1,000 00
<i>Grant for Match [428]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Marin Academy	Hillary Beuschel	\$1,000 00 3483 4/6/2009	\$1,000 00
<i>Grant for Match [369]</i>			
Marshall School	Hillary Beuschel	\$1,000 00 3798 12/22/2009	\$1,000.00
<i>Grant for Match [488]</i>			
Maryvale Preparatory School	Hillary Beuschel	\$500 00 3725 11/16/2009	\$500 00
<i>Grant for Match [462]</i>			
Mattie Rhodes Counseling & Arts Center Cruz, Consuelo 1740 Jefferson Kansas City, MO 64108 <i>funds to support the Hand-in-Hand to Community Creative Diversity with Latino Cultural Arts project</i>	Robert Bloch	\$10,000 00 3524 4/22/2009	\$10,000 00
McKendree College Dowling, Victoria 701 College Road Lebanon, IL 62254-1299 <i>Grant for Match [295]</i>	Hillary Beuschel	\$1,000 00 3358 1/29/2009	\$1,000 00
Mercy Hospital Foundation Johnston, Julie 500 E Market St. Iowa City, IA 52245 <i>Cash for Champions Mark Phillips (RSM)</i>	Hillary Beuschel	\$200 00 3726 11/16/2009	\$200 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$15,450 00 3359 1/29/2009	\$15,450 00
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$1,300 00 3439 2/19/2009	\$1,300 00
<i>Funds to support emergency assistance needs of Henry W Bloch Scholars during 2009</i>			
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$270 00 3469 3/20/2009	\$270 00
<i>Funds to support emergency assistance needs of Henry W Bloch Scholars during 2009</i>			
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$439 00 3484 4/6/2009	\$439 00
<i>Funds to support emergency assistance needs of Henry W Bloch Scholars during 2009</i>			
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$338 00 3525 4/22/2009	\$338 00
<i>Funds to support emergency assistance needs of Henry W Bloch Scholars during 2009</i>			
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$4,487 00 3584 6/24/2009	\$4,487 00
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$24,028 00 3700 11/3/2009	\$24,028 00
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			
Metropolitan Community Colleges Foundation	Carey Wilkerson Looney	\$650 00 3727 11/16/2009	\$650 00
<i>Funds to support emergency assistance needs of Henry W Bloch Scholars during 2009</i>			
Metropolitan Lutheran Ministry Glynn, Jim 3031 Holmes Kansas City, MO 64109	Carey Wilkerson Looney	\$9,250 00 3799 12/22/2009	\$9,250 00
<i>funds to stabilize the front of the organization's 3027 Holmes building, which houses the life skills education program and warehouse</i>			
Mid America Assistance Coalition Rich, John 1 West Armour Kansas City, MO 64111	Carey Wilkerson Looney	\$25,000 00 3440 2/19/2009	\$25,000 00
<i>funds to support emergency assistance needs of individuals in the greater Kansas City area</i>			
Mid America Assistance Coalition Rich, John 1 West Armour Kansas City, MO 64111	Carey Wilkerson Looney	\$10,000 00 3772 12/10/2009	\$10,000 00
<i>funds to support ongoing operation of the MAACLink data system</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Mid-America Regional Council Community Services Corporation Caccamo, James 600 Broadway, Suite 300 Kansas City, MO 64105-1554 <i>funds to support implementation of a pilot to determine the efficacy of teacher/child interactions and improved child outcomes</i>	Carey Wilkerson Looney	\$36,512 00 3653 9/28/2009	\$36,512 00
Mid-America Soap Box Derby Fortnei, Roy 2504 NW Overbrook Drive Lee's Summit, MO 64081 <i>Cash for Champions Bryan Stephens (WHQ)</i>	Hillary Beuschel	\$200 00 3313 1/8/2009	\$200 00
Middlebury College <i>Grant for Match [404]</i>	Hillary Beuschel	\$100 00 3585 6/24/2009	\$100 00
Miracles in Motion Handicapped Horseman Van Auken, Dennis PO Box 14 Cedar Rapids, IA 52406-0014 <i>Cash for Champions Jason Weeks (RSM)</i>	Hillary Beuschel	\$200 00 3678 10/15/2009	\$200 00
Missouri Colleges Fund, Inc. Backer, Mike 3401 West Truman Blvd, Suite 202 Jefferson City, MO 65109 <i>funds to support scholarships awarded through the Teacher's First initiative during 2009</i>	Carey Wilkerson Looney	\$2,500 00 3485 4/6/2009	\$2,500 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Missouri Council on Economic Education English, Mike University of Missouri-Kansas City 104H Manheim Hall 5100 Rockhill Rd Kansas City, MO 64110 <i>funds to build an on-line personal finance course for teachers, launch a recruitment effort, and to establish relationships with Kansas City area schools for participation</i>	Carey Wilkerson Looney	\$23,800 00 3314 1/8/2009	\$23,800 00
MOCSA Rilinger, Palle M Penn Tower Office Center 3100 Broadway, Suite 400 Kansas City, MO 64111 <i>Cash for Champions Brandy Lang</i>	Hillary Beuschel	\$200 00 3470 3/20/2009	\$200 00
MOCSA Chalfant, June Ann Penn Tower Office Center 3100 Broadway, Suite 400 Kansas City, MO 64111 <i>funds to support ongoing programs and operations</i>	Carey Wilkerson Looney	\$10,000 00 3547 5/11/2009	\$10,000 00
Montana State University <i>Grant for Match [240]</i>	Hillary Beuschel	\$350 00 3315 1/8/2009	\$350 00
Mount St. Mary's University <i>Grant for Match [450]</i>	Hillary Beuschel	\$1,000 00 3701 11/3/2009	\$1,000.00
Mount Vernon Nazarene University <i>Grant for Match [415]</i>	Hillary Beuschel	\$1,000 00 3629 9/2/2009	\$1,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Muscular Dystrophy Association Hollen, Shonna 1100 W 31st St Suite 120 Downers Grove, IL 60515 <i>Bloch Community Service Award Sophie Mitzel (Tax)</i>	Hillary Beuschel	\$4,000 00 3654 9/28/2009	\$4,000 00
Nassau Community College <i>Grant for Match [260]</i>	Hillary Beuschel	\$100 00 3316 1/8/2009	\$100 00
The Nature Conservancy, Kansas Chapter Palmer, Ruth 700 S W Jackson Suite 804 Topeka, KS 66603-3758 <i>funds to support The Kansas Prairie Legacy Campaign</i>	David Miles	\$5,000 00 3317 1/8/2009	\$5,000 00
The Nature Conservancy, Kansas Chapter Palmer, Ruth 700 S W Jackson Suite 804 Topeka, KS 66603-3758 <i>funds to support The Kansas Prairie Legacy Campaign</i>	David Miles	\$5,000 00 3773 12/10/2009	\$5,000 00
Neighborhood Self Help Fund MacDonald, Jim United Way of Greater Kansas City 1080 Washington Kansas City, MO 64105 <i>funds to support collaborative grant making activities for neighborhood improvement projects in low-income neighborhoods during 2009</i>	David Miles	\$5,000 00 3526 4/22/2009	\$5,000 00
The Nelson Gallery Foundation <i>Grant for Match [360]</i>	Hillary Beuschel	\$20,000 00 3456 3/5/2009	\$20,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
The Nelson Gallery Foundation Wilson, Maic 4525 Oak Street Kansas City, MO 64111 <i>funds to support the inaugural exhibition of the Bloch Building by presenting the Henry and Marion Bloch impressionist exhibit and to support educational programs and community outreach</i>	David Miles	\$100,000 00 3527 4/22/2009	\$100,000 00
The Nelson Gallery Foundation <i>Grant for Match [432]</i>	Hillary Beuschel	\$200 00 3679 10/15/2009	\$200 00
The Nelson Gallery Foundation Mark, Janet 4525 Oak Street Kansas City, MO 64111 <i>Sponsorship of the reception and Egyptian Gallery viewing during the Friends of Art Tribute in honor of Marc Wilson's retirement \$40,000 (\$2,400 expense)</i>	Carey Wilkerson Looney	\$37,600 00 3800 12/22/2009	\$37,600 00
Nonprofit Connect: Network, Learn, Grow Davis, Michelle P O Box 5813 4747 Troost, #201 Kansas City, MO 64171-0813 <i>funds to purchase IT equipment, software to set-up a new network, technical assistance, and internet access</i>	Carey Wilkerson Looney	\$7,725 00 3361 1/29/2009	\$7,725 00
Northern Illinois University Foundation <i>Grant for Match [403]</i>	Hillary Beuschel	\$250 00 3586 6/24/2009	\$250 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Northland Health Care Access Dolt, Karen P O Box 14414 Parkville, MO 64152 <i>funds to support evening hours of service at the Crestview Family Medical Clinic</i>	Hillary Beuschel	\$15,000 00 3774 12/10/2009	\$15,000 00
Northwestern University <i>Grant for Match [323]</i>	Hillary Beuschel	\$500 00 3416 2/9/2009	\$500 00
Oakhill Day School <i>Grant for Match [246]</i>	Hillary Beuschel	\$200 00 3319 1/8/2009	\$200 00
Oakhill Day School <i>Grant for Match [296]</i>	Hillary Beuschel	\$100 00 3362 1/29/2009	\$100 00
Oakhill Day School <i>Grant for Match [367]</i>	Hillary Beuschel	\$100 00 3471 3/20/2009	\$100 00
Oakhill Day School <i>Grant for Match [373]</i>	Hillary Beuschel	\$100 00 3486 4/6/2009	\$100 00
Oakhill Day School <i>Grant for Match [392]</i>	Hillary Beuschel	\$100 00 3548 5/11/2009	\$100.00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Oakhill Day School	Hillary Beuschel	\$100 00 3587 6/24/2009	\$100 00
<i>Grant for Match [402]</i>			
Oberlin College	Hillary Beuschel	\$1,000 00 3417 2/9/2009	\$1,000 00
<i>Grant for Match [331]</i>			
O'Gorman High School	Hillary Beuschel	\$1,000 00 3702 11/3/2009	\$1,000 00
<i>Grant for Match [429]</i>			
The Ohio State University	Hillary Beuschel	\$200 00 3418 2/9/2009	\$200 00
<i>Grant for Match [341]</i>			
The Ohio State University	Hillary Beuschel	\$120 00 3775 12/10/2009	\$120 00
<i>Grant for Match [481]</i>			
Operation Breakthrough Weil, Regina 3039 Troost Kansas City, MO 64109 <i>funds to support daycare and before and after school expenses for children whose parents are recently unemployed</i>	Carey Wilkerson Looney	\$25,000 00 3528 4/22/2009	\$25,000 00
Ozanam Hart, Judy 421 East 137th Street Kansas City, MO 64145 <i>funds to support ongoing programs and operations</i>	Carey Wilkerson Looney	\$6,000 00 3529 4/22/2009	\$6,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Pacific Lutheran University	Hillary Beuschel	\$500 00 3728 11/16/2009	\$500 00
<i>Grant for Match [461]</i>			
Parents as Teachers National Center Stepleton, Sue 2228 Ball Drive St Louis, MO 63146 <i>funds to support the 25th anniversary capital campaign for program expansion</i>	Carey Wilkerson Looney	\$10,000 00 3655 9/28/2009	\$10,000 00
Park School of Baltimore	Hillary Beuschel	\$250 00 3320 1/8/2009	\$250 00
<i>Grant for Match [267]</i>			
Pasadena Sunrise Rotary Foundation McKee, Roger P O Box 5301 East Pasadena Station Pasadena, CA 91117 <i>Cash for Champions Greg Jones (RSM)</i>	Hillary Beuschel	\$200 00 3458 3/5/2009	\$200 00
Pembroke Hill School	Hillary Beuschel	\$1,000 00 3703 11/3/2009	\$1,000 00
<i>Grant for Match [444]</i>			
Pentacrest Inc. Kellbach, Jeff 817 Pepperwood Lane Iowa City, IA 52240 <i>Cash for Champions Susan Moore</i>	Hillary Beuschel	\$200 00 3607 7/21/2009	\$200 00
Pepperdine University	Hillary Beuschel	\$1,000 00 3441 2/19/2009	\$1,000 00
<i>Grant for Match [355]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Phillips Academy	Hillary Beuschel	\$100 00 3321 1/8/2009	\$100 00
<i>Grant for Match [244]</i>			
Preuel School of Music	Hillary Beuschel	\$100 00 3597 7/9/2009	\$100.00
Zeithamel, Sonja 524 N Johnson Street Iowa City, IA 52245 <i>Cash for Champions Madeline Windauer</i>			
Providence Day School	Hillary Beuschel	\$500.00 3363 1/29/2009	\$500 00
<i>Grant for Match [319]</i>			
Providence Day School	Hillary Beuschel	\$1,000 00 3549 5/11/2009	\$1,000 00
<i>Grant for Match [388]</i>			
KCPT- Public Television 19	Carey Wilkerson Looney	\$25,000 00 3310 1/8/2009	\$25,000 00
Bioderick, Patricia 125 E 31st Street Kansas City, MO 64108 <i>funds to support global coversion to digital production equipment</i>			
KCPT- Public Television 19	Hillary Beuschel	\$700 00 3415 2/9/2009	\$700 00
<i>Grant for Match [324]</i>			
Ramaz School	Hillary Beuschel	\$1,000 00 3630 9/2/2009	\$1,000 00
<i>Grant for Match [421]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Raytown Sports Association Gleson, Julie PO Box 9503 Raytown, MO 64133 <i>Cash for Champions Deloris Wells</i>	Hillary Beuschel	\$200 00 3442 2/19/2009	\$200 00
reStart, Inc. Craig, Evelyn 918 E 9th Kansas City, MO 64106 <i>funds to support essential services provided for homeless individuals in the greater Kansas City area</i>	Carey Wilkerson Looney	\$25,000 00 3588 6/24/2009	\$25,000 00
Rice University <i>Grant for Match [413]</i>	Hillary Beuschel	\$100 00 3618 8/14/2009	\$100 00
Rockhurst University <i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>	Carey Wilkerson Looney	\$15,600 00 3459 3/5/2009	\$15,600 00
Rockhurst University <i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>	Carey Wilkerson Looney	\$7,800 00 3704 11/3/2009	\$7,800 00
Rose Brooks Center Miller, Susan P O Box 320599 Kansas City, MO 64132 <i>funds to support the Brighter Tomorrow Comprehensive campaign</i>	Carey Wilkerson Looney	\$50,000 00 3589 6/24/2009	\$50,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
The Roxbury Latin School	Hillary Beuschel	\$100 00 3322 1/8/2009	\$100 00
<i>Grant for Match [258]</i>			
Royal Family Kids Camp	Hillary Beuschel	\$200 00 3619 8/14/2009	\$200 00
Van Wicklin, John 7338 Park Drive Houghton, NY 14744 <i>Cash for Champions Betty Casey</i>			
Saint Luke's Hospital Foundation	Hillary Beuschel	\$200 00 3420 2/9/2009	\$200 00
<i>Grant for Match [325]</i>			
Saint Luke's Hospital Foundation	Hillary Beuschel	\$2,000 00 3707 11/3/2009	\$2,000 00
<i>Grant for Match [447]</i>			
Schlarman High School	Hillary Beuschel	\$100 00 3443 2/19/2009	\$100 00
<i>Grant for Match [358]</i>			
Schlarman High School	Hillary Beuschel	\$100 00 3802 12/22/2009	\$100 00
<i>Grant for Match [487]</i>			
Schools Count Corp., NFP	Hillary Beuschel	\$100 00 3487 4/6/2009	\$100 00
Flesher, Richard 219 Brookside Lande #A Willowbrook, IL 60527 <i>Cash for Champions Deborah Waggoner</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Sheffield Place Streeter, Karen 6604 East 12th Street Kansas City, MO 64126-2208 <i>funds to support ongoing operation of Project Hope</i>	Carey Wilkerson Looney	\$6,000 00 3776 12/10/2009	\$6,000 00
The Shepherd's Center Wurth, JoEllen 5200 Oak Kansas City, MO 64112 <i>funds to support implementation of the Coming of Age program</i>	Carey Wilkerson Looney	\$20,000 00 3323 1/8/2009	\$20,000 00
Siegal College <i>Grant for Match [297]</i>	Hillary Beuschel	\$500 00 3364 1/29/2009	\$500 00
Sigma Chi Educational Foundation of Missouri, Inc. <i>Grant for Match [326]</i>	Hillary Beuschel	\$4,980 00 3419 2/9/2009	\$4,980 00
Skidmore College <i>Grant for Match [298]</i>	Hillary Beuschel	\$1,000 00 3365 1/29/2009	\$1,000 00
Smith College <i>Grant for Match [449]</i>	Hillary Beuschel	\$3,000 00 3705 11/3/2009	\$3,000 00
Southern Illinois University Foundation Haas, Kathi Mailcode 6805, SIUC Carbondale, IL 62901 <i>Grant for Match [299]</i>	Hillary Beuschel	\$1,000 00 3366 1/29/2009	\$1,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Southern States Mastiff Rescue Zimmer, Jill 111 Greenbrier Terrace Charlottesville, VA 22901 <i>Cash for Champions Sue Martin</i>	Hillary Beuschel <i>VOIDED</i>	\$200 00 3472 3/20/2009	\$200 00
St. Ambrose University <i>Grant for Match [317]</i>	Hillary Beuschel	\$1,000 00 3367 1/29/2009	\$1,000 00
St. Ambrose University <i>Grant for Match [346]</i>	Hillary Beuschel	\$1,000 00 3421 2/9/2009	\$1,000 00
St. Ambrose University <i>Grant for Match [396]</i>	Hillary Beuschel	\$1,000 00 3550 5/11/2009	\$1,000 00
St. Andrew's School <i>Grant for Match [321]</i>	Hillary Beuschel	\$150 00 3368 1/29/2009	\$150 00
St. Cloud State University Foundation <i>Grant for Match [271]</i>	Hillary Beuschel	\$100 00 3324 1/8/2009	\$100 00
St. Cloud State University Foundation <i>Grant for Match [460]</i>	Hillary Beuschel	\$500 00 3729 11/16/2009	\$500 00

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
St. Ignatius College Preparatory	Hillary Beuschel	\$1,000 00 3444 2/19/2009	\$1,000 00
<i>Grant for Match [357]</i>			
St. John's Preparatory	Hillary Beuschel	\$120 00 3730 11/16/2009	\$120 00
<i>Grant for Match [467]</i>			
St. John's University	Hillary Beuschel	\$100 00 3326 1/8/2009	\$100 00
<i>Grant for Match [252]</i>			
St. Joseph Collegiate Institute	Hillary Beuschel	\$1,000 00 3731 11/16/2009	\$1,000 00
<i>Grant for Match [455]</i>			
St. Joseph's Collegiate Institute	Hillary Beuschel	\$1,000 00 3325 1/8/2009	\$1,000 00
<i>Grant for Match [248]</i>			
St. Joseph School	Hillary Beuschel	\$1,000 00 3369 1/29/2009	\$1,000 00
<i>Grant for Match [306]</i>			
St. Joseph School Vielhauer, Ruth Ann 5901 Flint Shawnee, KS 66203 <i>Cash for Champions Thomas Yearsley</i>	Hillary Beuschel	\$200 00 3778 12/10/2009	\$200 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
St. Mary's Catholic School	Hillary Beuschel	\$1,000 00 3803 12/22/2009	\$1,000 00
<i>Grant for Match [496]</i>			
St. Thomas Aquinas High School	Hillary Beuschel	\$500 00 3327 1/8/2009	\$500.00
<i>Grant for Match [257]</i>			
St. Thomas More Parish School	Hillary Beuschel	\$1,000 00 3370 1/29/2009	\$1,000 00
<i>Grant for Match [318]</i>			
Stanford University	Hillary Beuschel	\$150 00 3371 1/29/2009	\$150 00
<i>Grant for Match [300]</i>			
Stanford University	Hillary Beuschel	\$150 00 3708 11/3/2009	\$150 00
<i>Grant for Match [443]</i>			
Stony Brook University	Hillary Beuschel	\$100 00 3372 1/29/2009	\$100 00
<i>Grant for Match [303]</i>			
Summer of the Arts, Inc Keller, Dirk PO Box 3128 Iowa City, IA 52244 <i>Cash for Champions Jason Wagner (RSM)</i>	Hillary Beuschel	\$100 00 3732 11/16/2009	\$100 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Summerfest Concerts, Inc. Grant, Mary P O Box 22697 Kansas City, MO 64113-0697 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$3,000 00 3656 9/28/2009	\$3,000 00
Susquehanna University <i>Grant for Match [407]</i>	Hillary Beuschel	\$5,000 00 3599 7/9/2009	\$5,000 00
Synergy Services Shanberg Winner, Robin 400 E 6th Street Parkville, MO 64152 <i>funds to support the Place to Call Home capital campaign</i>	Carey Wilkerson Looney	\$50,000 00 3328 1/8/2009	\$50,000 00
Synergy Services Shanberg Winner, Robin 400 E 6th Street Parkville, MO 64152 <i>funds to purchase and install Community Carelink for electronic client records</i>	Carey Wilkerson Looney	\$25,000 00 3657 9/28/2009	\$25,000 00
Tabor College <i>Grant for Match [365]</i>	Hillary Beuschel	\$1,000 00 3460 3/5/2009	\$1,000 00
Teach for America Herald, Alicia Penn Tower Office Building 3100 Broadway, Suite 1114 Kansas City, MO 64111 <i>funds to support start-up of a Teach for America site in Kansas City</i>	Carey Wilkerson Looney	\$25,000 00 3329 1/8/2009	\$25,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Teach for America	Carey Wilkerson Looney	\$25,000 00	\$25,000 00
Herald, Alicia		3786	
Penn Tower Office Building		12/10/2009	
3100 Broadway, Suite 1114			
Kansas City, MO 64111			
<i>funds to support start-up of a Teach for America site in Kansas City</i>			
TLC for Children and Families	Carey Wilkerson Looney	\$22,500 00	\$22,500 00
West, Hillary		3780	
480 S Rogers Road		12/10/2009	
Olathe, KS 66062-1706			
<i>funds to support strategic planning</i>			
Truman Medical Center Charitable Foundation	Carey Wilkerson Looney	\$25,000 00	\$25,000 00
Bass, Debbie		3531	
2301 Holmes Road		4/22/2009	
Kansas City, MO 64108			
<i>funds to support services provided through outpatient clinic space</i>			
Tulane University	Hillary Beuschel	\$100 00	\$100 00
		3781	
		12/10/2009	
<i>Grant for Match [471]</i>			
Turning Point	Carey Wilkerson Looney	\$25,000 00	\$25,000 00
Mulhern, Julie		3782	
8900 State Line Road		12/10/2009	
Suite 240			
Shawnee Mission, KS 66206			
<i>funds to support evaluation of Turning Point programs</i>			
U.S. Navy Memorial Foundation	Hillary Beuschel	\$200 00	\$200 00
		3462	
		3/5/2009	
<i>Grant for Match [364]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Unicorn Theatre Levin, Cynthia 3828 Main Street Kansas City, MO 64111 <i>funds to support ongoing programs and operations</i>	Robert Bloch	\$8,000 00 3709 11/3/2009	\$8,000 00
Union Station Kansas City, Inc. O'Connor, Bridgette 30 West Pershing Suite 850 Kansas City, MO 64108 <i>funds to support expansion and renovation of Union Station's lower level, creation of new meeting and event space, and improvements to its telecommunications and ticketing systems</i>	David Miles	\$50,000 00 3658 9/28/2009	\$50,000 00
United Community Services of Johnson County Wulfschlegel, Karen 12351 West 96th Terrace, Suite 200 Lenexa, KS 66215 <i>funds to support strategic planning for homeless services in Johnson County, Kansas</i>	Carey Wilkerson Looney	\$10,000 00 3733 11/16/2009	\$10,000 00
United Inner City Services Mann, Sam 1101 Euclid Kansas City, MO 64127 <i>funds to support professional for teachers at the St Mark Child and Family Development Center</i>	Carey Wilkerson Looney	\$15,000 00 3590 6/24/2009	\$15,000 00
United Way of Greater Kansas City Stewart, Brent 1080 Washington Kansas City, MO 64105-2216 <i>funds to support collaborative grantmaking efforts for Kansas City area organizations providing emergency assistance</i>	Carey Wilkerson Looney	\$25,000 00 3445 2/19/2009	\$25,000 00

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
United Way of Greater Kansas City Dennis, Alinda 1080 Washington Kansas City, MO 64105-2216 <i>funds to support operation of the 2-1-1 referral and service information system</i>	Carey Wilkerson Looney	\$25,000 00 3532 4/22/2009	\$25,000 00
United Way of Greater Kansas City <i>Grant for Match [430]</i>	Hillary Beuschel	\$20,000 00 3684 10/15/2009	\$20,000 00
United Way of Greater Kansas City <i>Grant for Match [445]</i>	Hillary Beuschel	\$10,000 00 3710 11/3/2009	\$10,000 00
Indiana University Foundation <i>Grant for Match [472]</i>	Hillary Beuschel	\$500 00 3758 12/10/2009	\$500 00
University Academy <i>Grant for Match [362]</i>	Hillary Beuschel	\$1,800 00 3463 3/5/2009	\$1,800 00
University at Buffalo Foundation <i>Grant for Match [301]</i>	Hillary Beuschel	\$200 00 3376 1/29/2009	\$200 00
University of Central Missouri Foundation <i>Grant for Match [316]</i>	Hillary Beuschel	\$200 00 3377 1/29/2009	\$200 00

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
University of Connecticut	Hillary Beuschel	\$100 00	\$100 00
		3564	
		5/29/2009	
Grant for Match [400]			
University of Detroit Jesuit High School and Academy	Hillary Beuschel	\$150 00	\$150 00
		3331	
		1/8/2009	
Grant for Match [251]			
University of Dubuque	Hillary Beuschel	\$300 00	\$300 00
		3333	
		1/8/2009	
Grant for Match [270]			
University of Illinois Foundation	Hillary Beuschel	\$100 00	\$100 00
		3378	
		1/29/2009	
Grant for Match [302]			
University of Illinois Foundation	Hillary Beuschel	\$1,000 00	\$1,000 00
		3446	
		2/19/2009	
Grant for Match [354]			
University of Illinois Foundation	Hillary Beuschel	\$150 00	\$150 00
		3621	
		8/14/2009	
Grant for Match [411]			
University of Illinois Foundation	Hillary Beuschel	\$100 00	\$100 00
		3783	
		12/10/2009	
Grant for Match [474]			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Illinois Foundation	Hillary Beuschel	\$1,000 00 3806 12/22/2009	\$1,000 00
<i>Grant for Match [491]</i>			
University of Iowa Foundation	Hillary Beuschel	\$500 00 3335 1/8/2009	\$500 00
<i>Grant for Match [262]</i>			
University of Iowa Foundation	Hillary Beuschel	\$1,000 00 3334 1/8/2009	\$1,000 00
<i>Grant for Match [239]</i>			
University of Iowa Foundation	Hillary Beuschel	\$800 00 3379 1/29/2009	\$800 00
<i>Grant for Match [308]</i>			
University of Iowa Foundation	Hillary Beuschel	\$1,000 00 3488 4/6/2009	\$1,000 00
<i>Grant for Match [374]</i>			
University of Iowa Foundation	Hillary Beuschel	\$240 00 3552 5/11/2009	\$240 00
<i>Grant for Match [395]</i>			
University of Iowa Foundation	Hillary Beuschel	\$1,000 00 3551 5/11/2009	\$1,000 00
<i>Grant for Match [394]</i>			
University of Iowa Foundation	Hillary Beuschel	\$250 00 3735 11/16/2009	\$250 00
<i>Grant for Match [464]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Iowa Foundation	Hillary Beuschel	\$150 00 3734 11/16/2009	\$150 00
<i>Grant for Match [454]</i>			
University of Kansas Endowment Association	Hillary Beuschel	\$500 00 3414 2/9/2009	\$500 00
<i>Grant for Match [332]</i>			
University of Kansas Endowment Association Blaesing, Rebecca 1891 Constant Avenue Lawrence, KS 66044 <i>funds to support general operations and to purchase an ultrasound machine</i>	Carey Wilkerson Looney	\$18,900 00 3522 4/22/2009	\$18,900 00
University of Kansas Endowment Association	Hillary Beuschel	\$960 00 3615 8/14/2009	\$960 00
<i>Grant for Match [410]</i>			
University of Maryland-Baltimore Foundation	Hillary Beuschel	\$1,000 00 3659 9/28/2009	\$1,000 00
<i>Grant for Match [426]</i>			
University of Maryland College Park Foundation	Hillary Beuschel	\$100 00 3343 1/8/2009	\$100 00
<i>Grant for Match [247]</i>			
University of Maryland College Park Foundation	Hillary Beuschel	\$1,000 00 3601 7/9/2009	\$1,000 00
<i>Grant for Match [408]</i>			

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
University of Massachussetts - Amerherst	Hillary Beuschel	\$250 00 3380 1/29/2009	\$250 00
Grant for Match [322]			
University of Michigan	Hillary Beuschel	\$400 00 3381 1/29/2009	\$400 00
Grant for Match [309]			
University of Michigan	Hillary Beuschel	\$100 00 3382 1/29/2009	\$100 00
Grant for Match [305]			
University of Michigan	Hillary Beuschel	\$1,000 00 3383 1/29/2009	\$1,000 00
Grant for Match [304]			
University of Michigan	Hillary Beuschel	\$500 00 3464 3/5/2009	\$500 00
Grant for Match [361]			
University of Michigan	Hillary Beuschel	\$1,000 00 3474 3/20/2009	\$1,000 00
Grant for Match [368]			
University of Minnesota Foundation	Hillary Beuschel	\$1,000 00 3337 1/8/2009	\$1,000 00
Grant for Match [249]			
University of Minnesota Foundation	Hillary Beuschel	\$1,000 00 3384 1/29/2009	\$1,000 00
Grant for Match [291]			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Minnesota Foundation	Hillary Beuschel	\$500 00 3385 1/29/2009	\$500 00
<i>Grant for Match [310]</i>			
University of Minnesota Foundation	Hillary Beuschel	\$1,000.00 3386 1/29/2009	\$1,000 00
<i>Grant for Match [315]</i>			
University of Minnesota Foundation	Hillary Beuschel	\$500 00 3553 5/11/2009	\$500 00
<i>Grant for Match [393]</i>			
University of Minnesota Foundation	Hillary Beuschel	\$1,000 00 3660 9/28/2009	\$1,000 00
<i>Grant for Match [425]</i>			
University of Missouri - Columbia	Hillary Beuschel	\$400 00 3608 7/21/2009	\$400 00
<i>Grant for Match [409]</i>			
University of Missouri - Columbia	Hillary Beuschel	\$500 00 3784 12/10/2009	\$500 00
<i>Grant for Match [470]</i>			
University of Missouri, Kansas City	Carey Wilkerson Looney	\$75,162 91 3533 4/22/2009	\$75,162 91
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Missouri, Kansas City	Carey Wilkerson Looney	\$70,072.81 3533 4/22/2009	\$70,072.81
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			
University of Missouri, Kansas City	Carey Wilkerson Looney	\$4,560.87 3622 8/14/2009	\$4,560.87
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			
University of Missouri, Kansas City	Carey Wilkerson Looney	\$65,547.75 3736 11/16/2009	\$65,547.75
<i>Funds to support Henry W Bloch Scholars attending UMKC, Rockhurst University, Donnelly College, and Penn Valley Community College during 2009</i>			
University of Missouri-Columbia	Hillary Beuschel	\$220.00 3661 9/28/2009	\$220.00
<i>Grant for Match [422]</i>			
University of Nebraska at Omaha	Hillary Beuschel	\$100.00 3554 5/11/2009	\$100.00
<i>Grant for Match [391]</i>			
University of North Carolina at Wilmington	Hillary Beuschel	\$200.00 3534 4/22/2009	\$200.00
<i>Grant for Match [377]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of North Carolina at Wilmington	Hillary Beuschel	\$200 00 3535 4/22/2009	\$200 00
<i>Grant for Match [376]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3332 1/8/2009	\$1,000 00
<i>Grant for Match [255]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$500 00 3373 1/29/2009	\$500 00
<i>Grant for Match [311]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3374 1/29/2009	\$1,000 00
<i>Grant for Match [312]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$250 00 3375 1/29/2009	\$250 00
<i>Grant for Match [320]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3424 2/9/2009	\$1,000 00
<i>Grant for Match [350]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3422 2/9/2009	\$1,000 00
<i>Grant for Match [349]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3425 2/9/2009	\$1,000 00
<i>Grant for Match [348]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3423 2/9/2009	\$1,000 00
<i>Grant for Match [351]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3565 5/29/2009	\$1,000 00
<i>Grant for Match [398]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3620 8/14/2009	\$1,000 00
<i>Grant for Match [412]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$500 00 3685 10/15/2009	\$500 00
<i>Grant for Match [437]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3686 10/15/2009	\$1,000 00
<i>Grant for Match [438]</i>			
University of Northern Iowa Foundation	Hillary Beuschel	\$1,000 00 3711 11/3/2009	\$1,000 00
<i>Grant for Match [440]</i>			
University of Notre Dame	Hillary Beuschel	\$100 00 3447 2/19/2009	\$100 00
<i>Grant for Match [352]</i>			
University of Notre Dame	Hillary Beuschel	\$200 00 3807 12/22/2009	\$200 00
<i>Grant for Match [486]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Puget Sound	Hillary Beuschel	\$250 00 3387 1/29/2009	\$250 00
<i>Grant for Match [274]</i>			
University of Southern California	Hillary Beuschel	\$100 00 3489 4/6/2009	\$100.00
<i>Grant for Match [370]</i>			
University of St. Thomas Rowan, Michael 2115 Summit Ave Mail #Dev St Paul, MN 55902	Hillary Beuschel	\$250 00 3388 1/29/2009	\$250 00
<i>Grant for Match [313]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3394 1/29/2009	\$1,000 00
<i>Grant for Match [280]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3389 1/29/2009	\$1,000 00
<i>Grant for Match [285]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3390 1/29/2009	\$1,000 00
<i>Grant for Match [278]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 281 1/29/2009	\$1,000 00
<i>Grant for Match [281]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3393 1/29/2009	\$1,000 00
<i>Grant for Match [283]</i>			
University of Washington Foundation	Hillary Beuschel	\$500 00 3396 1/29/2009	\$500 00
<i>Grant for Match [284]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3392 1/29/2009	\$1,000.00
<i>Grant for Match [279]</i>			
University of Washington Foundation	Hillary Beuschel	\$500 00 3395 1/29/2009	\$500 00
<i>Grant for Match [282]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3426 2/9/2009	\$1,000 00
<i>Grant for Match [343]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3430 2/9/2009	\$1,000 00
<i>Grant for Match [344]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3428 2/9/2009	\$1,000 00
<i>Grant for Match [328]</i>			
University of Washington Foundation	Hillary Beuschel	\$500 00 3429 2/9/2009	\$500 00
<i>Grant for Match [329]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
University of Washington Foundation	Hillary Beuschel	\$1,000 00 3427 2/9/2009	\$1,000 00
<i>Grant for Match [327]</i>			
University of Washington Foundation	Hillary Beuschel	\$700 00 3810 12/22/2009	\$700 00
<i>Grant for Match [490]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000.00 3809 12/22/2009	\$1,000 00
<i>Grant for Match [489]</i>			
University of Washington Foundation	Hillary Beuschel	\$1,000.00 3808 12/22/2009	\$1,000 00
<i>Grant for Match [495]</i>			
The University of Wisconsin Foundation	Hillary Beuschel	\$125 00 3338 1/8/2009	\$125 00
<i>Grant for Match [253]</i>			
Valparaiso University Craig, Tammy 1100 Campus Drive South Valparaiso, IN 46383	Hillary Beuschel	\$500.00 3397 1/29/2009	\$500 00
<i>Grant for Match [314]</i>			
Vassar College	Hillary Beuschel	\$5,000 00 3536 4/22/2009	\$5,000 00
<i>Grant for Match [378]</i>			

Payee Organization		Amount	
Request Primary Contact		Check #	Deduct
Project Title	Staff	Paid Date	Amount
Virginia Commonwealth University	Hillary Beuschel	\$500 00 3631 9/2/2009	\$500 00
<i>Grant for Match [419]</i>			
Vision Research Foundation of Kansas City	Hillary Beuschel	\$8,304 80 3811 12/22/2009	\$8,304 80
<i>Grant for Match [494]</i>			
Wartburg College	Hillary Beuschel	\$1,000.00 3449 2/19/2009	\$1,000 00
<i>Grant for Match [353]</i>			
Westport Cooperative Services Smith, Jennifer 201 Westport Road Kansas City, MO 64111 <i>funds to support ongoing operation of the Senior Companions program coded as OPIY during 2008</i>	Carey Wilkerson Looney	\$5,000 00 3339 1/8/2009	\$5,000 00
Westport Cooperative Services Smith, Jennifer 201 Westport Road Kansas City, MO 64111 <i>funds to support ongoing operation of the Senior Companions program</i>	Carey Wilkerson Looney	\$5,000 00 3555 5/11/2009	\$5,000 00
Westport Cooperative Services	Carey Wilkerson Looney	\$2,500 00 3737 11/16/2009	\$2,500 00
<i>Funds to support H&R Block associate volunteer projects during 2009</i>			

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
Westside Housing Organization	David Miles	\$5,000 00	\$5,000 00
Walker, Kathryn		3566	
919 West 24th Street		5/29/2009	
Kansas City, MO 64108			
<i>funds to support costs associated with leadership transition and executive search</i>			
Wheaton College	Hillary Beuschel	\$1,000 00	\$1,000 00
		3431	
		2/9/2009	
<i>Grant for Match [330]</i>			
Whitinsville Christian School	Hillary Beuschel	\$125 00	\$125 00
		3785	
		12/10/2009	
<i>Grant for Match [477]</i>			
Wildwood Outdoor Education Center	Carey Wilkerson Looney	\$6,000 00	\$6,000 00
Cornejo, Jose and Robin		3490	
7095 West 399th Street		4/6/2009	
La Cygne, KS 66040			
<i>funds to support ongoing operation of the Summer Learning program</i>			
William Jewell College	Hillary Beuschel	\$100 00	\$100 00
		3738	
		11/16/2009	
<i>Grant for Match [466]</i>			
Wonderscope Children's Museum of Kansas City	Carey Wilkerson Looney	\$10,000 00	\$10,000 00
Hess, Lorraine		3591	
5700 King Street		6/24/2009	
Shawnee Mission, KS 66203			
<i>funds to purchase a cargo van for community outreach and education programs</i>			

Payee Organization	Amount		
Request Primary Contact	Check #	Deduct	
Project Title	Staff	Paid Date	Amount
YMCA of Greater Kansas City Brandmeyer, Jim 3100 Broadway Suite 1020 Kansas City, MO 64111-2413 <i>funds to purchase the Galileo online assessment system for 12 YMCA preschool sites</i>	Carey Wilkerson Looney	\$9,930 00 3609 7/21/2009	\$9,930 00
Youth Symphony of Kansas City Corneil, Mary 5960 Dearborn, Suite 206 Mission, KS 66202 <i>funds to support ongoing programs and operations and scholarships</i>	Robert Bloch	\$3,500 00 3491 4/6/2009	\$3,500 00
Youth Volunteer Corps Beard, Jenn 4600 West 51st Street, Suite 300 Shawnee Mission, KS 66205 <i>funds to support expansion of the Youth Volunteer Corp in the greater Kansas City area</i>	Carey Wilkerson Looney	\$5,000 00 3537 4/22/2009	\$5,000 00

Grand Total	\$3,134,901 28	\$3,134,901 28
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(441 items)

Void c.k. 3472

Shawnee Mission, KS 66205

Total Grants Paid

3,134,701.28

The H & R Block Foundation

Schedule 7A

Grants With Balances Due

December 31, 2009

12/31/2009

Organization Grant Amount	Total Paid	2009	2010	Scheduled Payments 2011	2012	2013	2014	Remaining Balance
<u>HRB Associate Programs</u>								
Scholarship America \$250,000.00 <i>Funds to support The H & R Block Foundation Scholarship program for the 2010-2011 school year</i>	\$19,920.00	\$0.00	\$230,080.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total HRB Associate Programs (1 item)	\$19,920.00	\$0.00	\$230,080.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<u>HRB Community Programs</u>								
Boys and Girls Clubs of Greater Kansas City \$50,000.00 <i>funds to support completion of construction/renovation of the JD Wagner BGC at 2405 Elmwood</i>	\$25,000.00	\$0.00	\$25,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Children's Campus of Kansas City \$75,000.00 <i>funds to support the Children's Campus of Kansas City capital campaign</i>	\$25,000.00	\$0.00	\$25,000.00	\$25,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Kansas City Public Library \$87,500.00 <i>funds to support the hiring of a professional staff person for the</i>	\$75,000.00	\$0.00	\$12,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The H & R Block Foundation

Grants With Balances Due

December 31, 2009

12/31/2009

Organization Grant Amount	Total Paid	2009	2010	Scheduled Payments 2011	2012	2013	2014	Remaining Balance
<i>H&R Block Business Information Center</i>								
Local Initiatives Support Corporation - LISC	\$200,000.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$0.00	\$0.00	\$0.00
\$300,000.00 <i>funds to support Phase II of the Neighborhoods NOW initiative</i>								
Mattie Rhodes Counseling & Arts Center	\$20,000.00	\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$30,000.00 <i>funds to support the Hand-in- Hand to Community Creative Diversity with Latino Cultural Arts project</i>								
The Nature Conservancy, Kansas Chapter	\$20,000.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$25,000.00 <i>funds to support The Kansas Prairie Legacy Campaign</i>								
The Nelson Gallery Foundation	\$700,000.00	\$0.00	\$100,000.00	\$100,000.00	\$100,000.00	\$0.00	\$0.00	\$0.00
\$1,000,000.00 <i>funds to support the inaugural exhibition of the Bloch Building by presenting the Henry and Marion Bloch impressionist exhibit and to support educational programs and community outreach</i>								
PREP-KC	\$300,000.00	\$0.00	\$100,000.00	\$100,000.00	\$0.00	\$0.00	\$0.00	\$0.00

The H & R Block Foundation

Grants With Balances Due

December 31, 2009

12/31/2009

Organization Grant Amount	Total Paid	2009	2010	2011	Scheduled Payments 2012	2013	2014	Remaining Balance
\$500,000.00 <i>Funds to support start-up expenses for the Partnership for Regional Education Preparation-Kansas City to provide necessary infrastructure to support regional school reform</i>								
Samuel U. Rodgers Health Center	\$0.00	\$0.00	\$50,000.00	\$50,000.00	\$50,000.00	\$0.00	\$0.00	\$0.00
\$150,000.00 <i>funds to support construction of a new facility</i>								
Union Station Kansas City, Inc.	\$100,000.00	\$0.00	\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$150,000.00 <i>funds to support expansion and renovation of Union Station's lower level, creation of new meeting and event space, and improvements to its telecommunications and ticketing systems</i>								
Total HRB Community Programs	\$1,465,000.00	\$0.00	\$377,500.00	\$375,000.00	\$150,000.00	\$0.00	\$0.00	\$0.00
(10 items)								
Grand Total	\$1,484,920.00	\$0.00	\$607,580.00	\$375,000.00	\$150,000.00	\$0.00	\$0.00	\$0.00
(11 items)								
(11 items)								

Total = \$1,132,580

hrb balance due 12-31-09

**The H & R Block Foundation
Regular Meeting of the Board of Directors
February 18, 2009**

A regular meeting of the Board of Directors of The H & R Block Foundation was held on February 18, 2009, at One H&R Block Way, Kansas City, Missouri 64105 pursuant to notice, and in accordance with the Bylaws of the Foundation.

The following members of the Board of Directors were present, to wit:

Henry W. Bloch

Frank L. Salizzoni

William A. Hall

Morton I. Sosland (via telephone)

The following Foundation associates were also in attendance: David P. Miles, President; Carey Wilkerson Looney, Vice President and Secretary; and Hillary Beuschel, Program Administrator. Henry W. Bloch acted as Chairman of the meeting. Carey Wilkerson Looney acted as Secretary of the meeting.

First, the Chairman requested approval of the minutes of the annual meeting of the Board of Directors held on December 10, 2008, noting that copies of such minutes had been mailed to all directors prior to the meeting. Upon motion duly made by Mr. Salizzoni and seconded by Mr. Hall, the minutes were unanimously approved.

The Chairman then referred to the financial statements that had been distributed prior to the meeting. The balance sheet showed that as of December 31, 2008, the assets of the Foundation totaled \$44,260,192. The Chairman ordered that the financial statements be filed with the records of the Foundation.

Eric Thornton, of Cambridge Associates, then reviewed the following items: investment portfolio performance, market outlook, and recommended changes to the investment portfolio. In 2008, the Foundation's portfolio returned -32.5 percent, underperforming the policy benchmark for the period by 440 basis points. Since the policy's 2004 inception, the portfolio has returned an average of -0.5 percent annually, an average 80 basis points behind the policy benchmark. Following the discussion, the following outcomes were approved:

- Diversify the 10% allocation to real estate to include REITs, commodities, and natural resource equities
- Move toward the new allocation targets over time, with the objective that the portfolio be invested in line with the new targets by the end of 2009
- Foundation should hold sufficient cash for operations outside of the long-term investment portfolio

Cambridge Associates will recommend a portfolio transition plan and new commodities and natural resource equity managers at the next Board meeting. At the conclusion of the discussion, Mr. Thornton left the meeting.

Mr. Miles reviewed the Foundation's 2008 successes, which included: developing a Statement of Intent, adding William A. Hall to the Board of Directors, receiving a \$2 million gift from H&R Block, and the distribution of \$1.94 million to charitable organizations. It was noted that \$639,000 in grant distributions were carried forward

and added to 2009 budget. A summary of 2008 grant distributions in the areas of associate programs, Foundation programs, and community programs was provided.

Next, Mr. Miles presented the 2009 funding priorities, business plan, budget, and grant funding strategies. The Foundation's business plan included the core areas of organizational effectiveness, financial responsibility, and community investment. The recommended budget was \$3,719,000, which includes \$639,000 carried forward from 2008. Mr. Miles then presented the recommended standing grants and an overview of staff leadership in community projects. Upon motion duly made by Mr. Hall and seconded by Mr. Sosland, the 2009 planning documents and budget were approved.

In response to the economic downturn, the following essential services grant recommendations were approved:

Harvesters – a grant for \$25,000, to purchase food and other items necessary to address emergency assistance needs

Mid America Assistance Coalition – a grant for \$25,000, to provide emergency assistance

United Way of Greater Kansas City/Collaborative Funder's Pool – a grant for \$25,000, to provide program support grants for agencies addressing emergency assistance or other critical human needs such as: food; utility assistance; housing; transportation; medical needs through the safety-net clinics; and programs that link persons in financial need to stability and independence

It was noted that Mr. Sosland is involved with Harvesters and that he abstained from voting.

Due to Mark Ernst's new position as Deputy Commissioner of the Internal Revenue Service, he must resign from his various Board memberships. Upon motion duly made by Mr. Sosland and seconded by Mr. Salizzoni, Mr. Ernst's resignation from the Board of Directors was accepted.

After acceptance of Mr. Ernst's resignation, Mr. Miles, Ms. Wilkerson Looney, and Ms. Beuschel left the meeting and the Board of Directors went into executive session to discuss the addition of a new member to the Foundation's Board of Directors.

There being no further business to come before the Board, upon motion duly made by Mr. Sosland and seconded by Mr. Hall, the meeting was adjourned.

Approved:

Henry W. Bloch, Chairman of the
Meeting

Carey Wilkerson Looney, Secretary of the
Meeting

The H & R Block Foundation
Regular Meeting of the Board of Directors
April 21, 2009

A regular meeting of the Board of Directors of The H & R Block Foundation was held on April 21, 2009, at One H&R Block Way, Kansas City, Missouri, 64105 pursuant to notice, and in accordance with the Bylaws of the Foundation.

The following members of the Board of Directors were present, to wit:

Henry W. Bloch	Frank L. Salizzoni
William A. Hall	Morton I. Sosland
Edward T. Matheny, Jr.	Russell P. Smyth

Also in attendance were David P. Miles, President of The H & R Block Foundation, and Carey Wilkerson Looney, Vice President & Secretary of The H & R Block Foundation. Henry W. Bloch acted as Chairman of the meeting. Carey Wilkerson Looney acted as Secretary of the meeting.

The Chairman welcomed Russell P. Smyth, President and CEO of H&R Block, to the Foundation's Board of Directors. Mr. Smyth's nomination to the Foundation's Board of Directors was approved at the February 18, 2009 meeting. Mr. Smyth accepted the nomination and will serve until the next Annual Meeting.

The Chairman then requested approval of the minutes of the Board of Directors meeting held on February 18, 2009, noting that copies of such minutes had been distributed to all directors prior to the meeting. Upon motion duly made by Mr. Sosland and seconded by Mr. Salizzoni, the minutes were unanimously approved.

Next, the Chairman referred to the financial statements that had been distributed prior to the meeting. The balance sheet showed that as of February 28, 2009, the assets of the Foundation were \$39,468,930. It was noted that the significant increase in year-to-date contributions was due to \$639,000 in 2008 grant payments that were carried forward to 2009. The Chairman ordered that the financial statements be filed with the records of the Foundation.

Eric Thornton and Francisco Aguirre, Cambridge Associates, joined the meeting (via telephone) to: review the portfolio's performance through March 31, 2009; determine management of 10% real assets allocation; finalize a transition plan for moving the portfolio to its new targets during 2009; and to review the revised Statement of Investment Objectives and Policies. It was noted that during the first quarter of 2009, the portfolio declined 5.7%, 380 points ahead of the policy benchmark. Since the portfolio's inception in March 2004, it has returned an average of -1.5%, 20 basis points ahead of the policy benchmark. After discussion, the following actions were recommended:

- Retain Wellington Management Company as the REIT manager with a 6% target allocation and add the T. Rowe Price New Era fund, as the natural resources manager, with a 4% target allocation

- Rebalance the investment portfolio incrementally by the end of 2009. This includes, but is not limited to, reducing assets in fixed income, increasing assets in emerging markets, and investing in natural resources
 - Acceptance of the revised Statement of Investment Objectives and Policies
- Upon motion dually made by Mr. Sosland and seconded by Mr. Hall, the recommended actions were unanimously approved. After the discussion, the phone call with Mr. Thornton and Mr. Aguirre was concluded.

Following the conclusion of the phone call, Mr. Miles noted that renewal of the Foundation's contract with Cambridge Associates will be reviewed in June 2009. He sought guidance from the Board of Directors regarding the process desired to review the performance of Cambridge Associates. The Board of Directors stated they are satisfied with the services provided by Cambridge Associates and requested information on comparable fees charged by other investment advisors. It should be noted that Mr. Hall abstained from contract discussions with Cambridge Associates due to a professional conflict of interest.

Next, the Board of Directors considered a list of pending requests for grants and essential services contributions. In this regard, the Chairman referred to the previously distributed summary of all pending requests with attached descriptive data regarding the institution making the request, and the purpose thereof. Such requests and the action taken with respect to each request include the following:

Community Development

City Vision Ministries – a grant for \$15,000 was approved, payable in 2009, to support project management capacity within the organization

Education

DeLaSalle Education Center – a grant for \$20,000 was approved, payable in 2009, to support the Leadership Academy and Recovery Program

KIPP Endeavor Academy – a grant for \$15,000 was approved, payable in 2009, to supplement math teacher salaries during the 2009 – 2010 school year

Health and Human Service

University of Kansas Endowment Association/JayDoc Free Health Clinic – a grant for \$18,900 was approved, payable in 2009, to purchase an ultrasound machine for use by JayDoc Free Health Clinic and Southwest Boulevard Family Health Care

The following essential services grant recommendations were approved:

Catholic Charities of Northeast Kansas – a grant for \$25,000, to support services for low-income individuals through their family advocacy centers

Guadalupe Center – a grant for \$25,000, to support the children's nutrition program

Operation Breakthrough – a grant for \$25,000, to support daycare and before/after school costs for children whose parents are unemployed

Truman Medical Center – a grant for \$25,000, to support services provided for low-income, uninsured individuals through outpatient clinics

United Way of Greater Kansas City – a grant for \$25,000, to support the 2-1-1 referral service and information system

The standing grants paid since November 1, 2008, were reviewed and ratified:

CASA of Johnson & Wyandotte Counties	\$4,000
Charlotte Street Foundation	\$5,000
The Coterie Theatre	\$8,000
Friends of Chamber Music	\$13,500
Hispanic Scholarship Fund at the Greater Kansas City Community Foundation	\$10,000
Kansas City Chamber Orchestra	\$2,500
Kansas City Friends of Alvin Ailey	\$11,500
Metropolitan Community Colleges Foundation/ Story Telling Celebration	\$1,500
Sheffield Place	\$6,000
Westport Cooperative Services	\$5,000
Young Audiences/Arts Partners	\$12,000

The following grants approved and made by the Foundation's Chairman on behalf of the Foundation since November 1, 2008, were reviewed and ratified:

Accessible Arts	\$2,500
Argentine Neighborhood Development Association	\$5,000
Dismas House	\$5,000
Jewish Family Services	\$10,000
Missouri Charter Public School Association	\$2,500
National Academy Foundation/ Academy of Finance at Bishop Ward High School	\$10,000
Nonprofit Connect: Network, Learn, Grow	\$7,725
Northwest Communities Development Corporation	\$5,000

The grant requests recommended for denial were reviewed and such denials were approved as presented. A summary of requests that had been denied by staff was presented and such denials were reviewed and ratified by the Board.

Finally, the project reviews were presented and continued funding of multi-year grants was approved.

There being no further business to come before the Board, upon motion duly made by Mr. Matheny and seconded by Mr. Smyth, the meeting was adjourned.

Approved:

Henry W. Bloch
Chairman of the Meeting

Carey Wilkerson Looney
Secretary of the Meeting

**The H & R Block Foundation
Regular Meeting of the Board of Directors
June 23, 2009**

A regular meeting of the Board of Directors of The H & R Block Foundation was held on June 23, 2009, at One H&R Block Way, Kansas City, Missouri 64105 pursuant to notice, and in accordance with the Bylaws of the Foundation.

The following members of the Board of Directors were present, to wit:

Henry W. Bloch

Frank L. Salizzoni

William A. Hall

Morton I. Sosland

Edward T. Matheny, Jr.

Also in attendance were David P. Miles, President of The H & R Block Foundation, and Carey Wilkerson Looney, Vice President & Secretary of The H & R Block Foundation. Russell P. Smyth was unable to attend the meeting. Henry W. Bloch acted as Chairman of the meeting. Carey Wilkerson Looney acted as Secretary of the meeting.

The Chairman requested approval of the minutes of the Board of Directors meeting held on April 21, 2009, noting that copies of such minutes had been distributed to all directors prior to the meeting. Upon motion duly made by Mr. Sosland and seconded by Mr. Salizzoni, the minutes were unanimously approved.

Mr. Miles presented the Foundation's financial statements that had been distributed prior to the meeting. As of April 30, 2009, the assets of the Foundation were \$43,604,892. It was noted that the Foundation's second quarter investment performance report would be presented at the September 22, 2009 meeting. The Chairman ordered that the financial statements be filed with the records of the Foundation.

Next, Stan House and Mary Stratman, of House Park & Dobratz, reviewed the Foundation's 2008 audit with the Board of Directors. Mr. House noted that the investment fees included in the audit do not reflect the total fees because some investment fees are embedded within the funds. The Board of Directors requested that the total investment fees be reflected as a footnote in future audits. After the audit review, Mr. Miles and Ms. Wilkerson Looney were excused from the meeting for further Board inquiry about the audit. Once the inquiry was complete, Mr. House and Ms. Stratman left the meeting and Mr. Miles and Ms. Wilkerson Looney rejoined the meeting. Upon motion duly made by Mr. Matheny and seconded by Mr. Hall, the 2008 audit was unanimously approved with the addition of the footnote.

Then, the Investment Committee recommended approval of a one year investment advisor agreement with Cambridge Associates. The agreement includes fees of \$75,000 for the period of October 1, 2009 to September 30, 2010. It was

noted that the fee was not increased from the previous year. The Committee also recommended placing the Foundation's cash assets at H&R Block Bank into the FDIC's Temporary Liquidity Guarantee Program. This program will fully insure the Foundation's cash assets at the H&R Block Bank. Upon motion duly made by Mr. Matheny and seconded by Mr. Salizzoni, the investment advisor agreement and placement of cash accounts into the FDIC's Temporary Liquidity Guarantee Program were unanimously approved. Mr. Hall abstained from the Cambridge Associates agreement discussion and vote due to a professional conflict of interest.

The Board of Directors then considered a list of pending requests for grants and essential services contributions. In this regard, the Chairman referred to the previously distributed summary of all pending requests with attached descriptive data regarding the institution making the request, and the purpose thereof. Such requests and the action taken with respect to each request include the following:

Education

Donnelly College – a grant for \$15,000 was approved, payable in 2009, to support assessment measures for students

United Inner City Services – a grant for \$15,000 was approved, payable in 2009, to support professional development and access to early learning programs for underserved children

Health & Human Service

Big Brothers Big Sisters of Greater Kansas City – a grant for \$20,000 was approved, payable in 2009, to support outsourcing of human resource functions and client and volunteer management systems

Community LINC – a grant for \$20,000 was approved, payable in 2009, to provide the required match for the organization's 2009 HUD contract for supportive housing services

The following essential services grant recommendations were approved:

El Centro – a grant for \$10,000 to support essential services provided for Hispanic clients utilizing family support, financial management, and domestic violence counseling services

reStart – a grant for \$25,000 to support the increased demand for emergency shelter and transitional living services for single adults, in addition to, emergency shelter and supportive housing for families

The Helping Hand of Goodwill Industries – a grant for \$15,000 to support the Job Hunter's program

The standing grants paid since March 1, 2009, were reviewed and ratified:

Camps for Kids	\$6,000
Clay County Clothes Closet	\$2,000
Heart of America Community AIDS Partnership	\$10,000
Kansas City Art Institute	\$16,500
Missouri Colleges Fund	\$2,500
Neighborhood Self Help Fund	\$5,000
Ozanam	\$6,000
Wildwood Outdoor Education Center	\$6,000
Youth Symphony of Kansas City	\$3,500

The following grants approved and made by the Foundation's Chairman on behalf of the Foundation since March 1, 2009, were reviewed and ratified:

AdHoc Group Against Crime	\$5,000
Alliance on Aging	\$4,675
Higher M-Pact	\$5,000
Johnson County Interfaith Hospitality Network	\$5,000

The associate engagement grants paid since March 1, 2009, were reviewed and ratified:

American Red Cross of Greater Kansas City	\$2,500
Camp Fire USA, Heartland Council	\$1,500
Junior Achievement of Middle America	\$6,000

The grant requests recommended for denial were reviewed and such denials were approved as presented. A summary of requests that had been denied by staff was presented and such denials were reviewed and ratified by the Board.

Finally, the project reviews were presented and continued funding of multi-year grants was approved.

There being no further business to come before the Board, upon motion duly made by Mr. Hall and seconded by Mr. Sosland, the meeting was adjourned.

Approved:

Henry W. Bloch
Chairman of the Meeting

Carey Wilkerson Looney
Secretary of the Meeting

**The H & R Block Foundation
Annual Meeting of the Board of Directors
September 22, 2009**

The annual meeting of the Board of Directors of The H & R Block Foundation was held on September 22, 2009, at One H&R Block Way, Kansas City, Missouri 64105 pursuant to notice, and in accordance with the Bylaws of the Foundation.

The following members of the Board of Directors were present, to wit:

Henry W. Bloch

Frank L. Salizzoni

William A. Hall

Morton I. Sosland

Edward T. Matheny, Jr.

Also in attendance were David P. Miles, President of The H & R Block Foundation, Carey Wilkerson Looney, Vice President and Secretary of The H & R Block Foundation, and Hillary Beuschel, Program Administrator of The H & R Block Foundation. Russell P. Smyth was unable to attend the meeting. Henry W. Bloch acted as Chairman of the meeting. Carey Wilkerson Looney acted as Secretary of the meeting.

The Chairman first requested approval of the minutes of the Board of Directors meeting held on June 23, 2009, noting that copies of such minutes had been mailed to all directors prior to the meeting. Upon motion duly made by Mr. Salizzoni and seconded by Mr. Hall, the minutes were unanimously approved.

Next, the Chairman referred to the financial statements that had been distributed prior to the meeting. The balance sheet showed that as of July 31, 2009, the assets of the Foundation, totaled \$48,158,839. The Chairman ordered that the financial statements be filed with the records of the Foundation.

The 2009 Second Quarter Investment Performance Report, prepared by Cambridge Associates, was reviewed. It was noted that the Foundation's portfolio increased 8.4% in the first two quarters of 2009, 320 basis points ahead of its policy benchmark. Since inception, the portfolio has returned an average of 1.2% per year; or an average of 10 basis points ahead of the policy benchmark.

Mr. Miles then presented the following Investment Committee recommendations for approval by the Board of Directors:

1. Liquidation of the investment in Marsico Capital Management
2. Liquidation of the investment in Vanguard Group's International Value Fund
3. Addition of a passive international manager, State Street Global Advisors MSCI EAFE Index Fund
4. Addition of an active global equity manager, Oldfield Partners
5. An increase of 2% to the SSgA Russell 3000 target; and the addition of a 5% target for Oldfield Partners and 9% target for the SSgA EAFE Index
6. Modification of the Statement of Investment Objectives and Policies to allow more flexibility with establishing benchmarks without needing to approve a new policy.

Upon motion duly made by Mr. Hall and seconded by Mr. Salizzoni, investment committee recommendations were unanimously approved. Mr. Miles also presented information that showed the Foundation's 2008 total investment fees, as a percentage of the average monthly investment assets, were 92 basis points.

The Board then considered the election of directors. Upon motion duly made by Mr. Matheny and seconded by Mr. Sosland, the following directors were elected to serve until the next Annual Meeting and until their respective successors are elected or chosen and qualify were:

Henry W. Bloch
William A. Hall
Edward T. Matheny, Jr.

Frank L. Salizzoni
Russell P. Smyth
Morton I. Sosland

Consideration was given to the election of officers. Upon motion duly made by Mr. Hall and seconded by Mr. Matheny, the following officers were elected to serve at the pleasure of the Board in the respective capacities indicated:

Henry W. Bloch, Chairman and Treasurer
Frank L. Salizzoni, Vice Chairman
David P. Miles, President
Carey E. Wilkerson Looney, Vice President and Secretary
Becky S. Shulman, Assistant Treasurer
Douglas M. Salaway, Assistant Secretary

Next, the Board of Directors considered a list of pending requests for grants and contributions. In this regard, the Chairman referred to the previously distributed summary of pending requests with attached descriptive data regarding the institution making the request and the purpose thereof. Such requests and the action taken with respect to each request include the following:

Education

Cristo Rey Kansas City – a grant for \$25,000 was approved, payable in 2009, to support the college readiness seminar.

Gillis Center – a grant for \$11,326 was approved, payable in 2009, to replace science and social studies curricula at Gillis Alternative Day School.

Parents As Teachers National Center – a grant for \$10,000 was approved, payable in 2009, to support the organization's 25th anniversary program expansion campaign.

Health & Human Service

Benilde Hall – a grant for \$12,000 was approved, payable in 2009, to support the homeless outreach program.

Cabot Westside Health Center – a grant for \$25,000 was approved, payable in 2009, to support expansion of the organization's parking lot.

Synergy Services – a grant for \$25,000 was approved, payable in 2009, to purchase and install Community CareLink.

The following essential services grant recommendations were approved:

Community Services League – a grant for \$25,000 was approved, payable in 2009, to support emergency and direct assistance and employment programs.

Don Bosco Community Center – a grant for \$15,000 was approved, payable in 2009, to support the Work Empowerment program.

The standing grants paid since May 1, 2009, were reviewed and ratified:

Children's Center for the Visually Impaired	\$6,000
Metropolitan Organization to Counter Sexual Assault	\$10,000
Westport Cooperative Services	\$5,000

The grants that were approved and made by the Foundation's Chairman on behalf of the Foundation since May 1, 2009, were reviewed and ratified:

Arts Incubator of Kansas City	\$4,490
CHWC	\$5,000
Downtown Council of Kansas City, Missouri/	
Downtown Civic Ventures	\$10,000
Liberty Memorial Association	\$10,000
Westside Housing Organization	\$5,000
Wonderscope Children's Museum of Kansas City	\$10,000
YMCA of Greater Kansas City	\$9,930

The associate engagement grant paid since May 1, 2009 was reviewed and ratified:

Heart to Heart International	\$5,000
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Requests recommended for denial were reviewed and such denials were approved as presented with the exception of Parents As Teachers National Center.

Project reviews and the reports were presented. Continued funding of the multi-year grants and recommendations were approved.

Next, Mr. Miles presented information on the 2009-2010 H & R Block Foundation Scholarship program. The Foundation provided \$226,680 to Scholarship America; which included \$194,250 for scholarships and \$32,430 for management fees. There were 1,450 applications for the scholarship and 190 recipients. Scholarship amounts varied from \$1,000 to \$1,200. The following recommendations were presented for the 2010 – 2011 program:

- Increasing funding of scholarships to \$250,000 (\$221,500 for scholarship awards and \$28,500 for management fees)
- Transition to an online application process

Upon motion duly made by Mr. Matheny and seconded by Mr. Sosland recommendations for the 2010 – 2011 H & R Block Foundation Scholarship program were unanimously approved.

Mr. Miles presented the Henry W. Bloch Scholars program assessment that was conducted by Bernard Consulting Group during summer 2009. It was noted that during the 2009 - 2010 school year, staff will complete the following:

- Review of complete assessment with partner institutions
- Prioritize program recommendations with program partners
- Develop a work plan to implement program enhancements

Finally, Mr. Miles provided the Board of Directors with the list of authorized agents for the Foundation's money market and checking accounts. Authorized agents are Henry W. Bloch, David P. Miles, Douglas M. Salaway, Frank L. Salizzoni, and Becky S. Shulman. It was noted that Mr. Miles is not authorized to sign checks for administrative or grant distribution payments.

There being no further business to come before the Board, upon motion duly made by Mr. Hall and seconded by Mr. Sosland, the meeting was adjourned.

Approved:

Henry W. Bloch, Chairman of the Meeting

Carey Wilkerson Looney, Secretary of the Meeting

**The H & R Block Foundation
Regular Meeting of the Board of Directors
December 9, 2009**

A regular meeting of the Board of Directors of The H & R Block Foundation was held on December 9, 2009, at One H&R Block Way, Kansas City, Missouri 64105 pursuant to notice, and in accordance with the Bylaws of the Foundation.

The following members of the Board of Directors were present, to wit:

Henry W. Bloch

Frank L. Salizzoni

William A. Hall

Russell P. Smyth

Edward T. Matheny, Jr.

Morton I. Sosland

Also in attendance were David P. Miles, President of The H & R Block Foundation, Carey Wilkerson Looney, Vice President and Secretary of The H & R Block Foundation, and Hillary Beuschel, Program Administrator of The H & R Block Foundation. Henry W. Bloch acted as Chairman of the meeting. Carey Wilkerson Looney acted as Secretary of the meeting.

First, the Chairman requested approval of the minutes of the annual meeting of the Board of Directors held on September 22, 2009, noting that copies of such minutes had been mailed to all directors prior to the meeting. Upon motion duly made by Mr. Hall and seconded by Mr. Sosland, the minutes were unanimously approved.

Mr. Miles then referred to the financial statements that had been distributed prior to the meeting. The balance sheet showed that as of October 31, 2009, the assets of the Foundation totaled \$50,503,089. The Chairman ordered that the financial statements be filed with the records of the Foundation. The Chairman also thanked Mr. Smyth for the Corporation's \$2 million gift that will be transferred to the Foundation on December 14, 2009.

The 2009 Third Quarter Investment Performance Report, prepared by Cambridge Associates, was reviewed. It was noted that the Foundation's portfolio increased 13.9% during the third quarter, 100 basis points behind the policy benchmark. Since inception in 2004, the portfolio has returned an average of 3.6% per year, marginally lagging the policy benchmark by an average of 20 basis points. Mr. Miles informed the Board of Directors that the FDIC's Temporary Liquidity Guarantee, insuring the Foundation's cash assets at H&R Block Bank, has been extended to June 30, 2010.

Next, Mr. Miles recommended that House, Park & Dobratz perform the Foundation's 2009 audit for a fee not to exceed \$7,000, including out-of-pocket expenses. Upon motion duly made by Mr. Salizzoni and seconded by Mr. Smyth, the engagement of House, Park & Dobratz to perform the Foundation's 2009 audit was unanimously approved.

Then, the Board of Directors considered a list of pending requests for grants and contributions. In this regard, the Chairman referred to the previously distributed summary of pending requests with attached descriptive data regarding the institution

making the request and the purpose thereof. Such requests and the action taken with respect to each are as follows:

Community Development

Legal Aid of Western Missouri – a grant for \$20,000 was approved, payable in January 2010, to support the short-term reduction of Interest on Lawyer Trust Accounts (IOLTA) funding during 2010.

Education

Jumpstart for Young Children – a grant for \$15,000 was approved, payable in 2009, to support implementation of a new curriculum through Jumpstart Kansas City.

Health & Human Service

Developing Potential Inc. – a grant for \$14,044 was approved, payable in 2009, to purchase 30 netbooks for the organization's staff to meet Medicaid requirements.

Southwest Boulevard Family Health Care – a grant for \$38,700 was approved, payable in 2009, to purchase digital radiology equipment.

TLC for Children and Families – a grant for \$22,500 was approved, payable in 2009, to support organizational assessment and strategic planning by Team Tech Consultants. This grant is contingent upon staff verification that Team Tech Consultants has expertise in state of Kansas social services funding revenue streams.

Turning Point – a grant for \$25,000 was approved, payable in 2009, to support comprehensive organizational assessment for resource allocation and program development.

The following essential services grant recommendations were approved:

Health Partnership Clinic of Johnson County – a grant for \$15,000 was approved, payable in 2009, to support the pharmaceutical assistance program for uninsured individuals living in Johnson County, Kansas.

Kansas City Free Health Clinic – a grant for \$15,000 was approved, payable in 2009, to support medications for uninsured individuals living in Jackson County, Missouri.

Northland Health Care Access – a grant for \$15,000 was approved, payable in 2009, to support evening hours of service at the Crestview Family Medical Clinic.

The grants approved and made by the Foundation's Chairman on behalf of the Foundation since August 1, 2009, were reviewed and ratified:

ArtsTech	\$10,000
Child Abuse Prevention Association	\$8,000
Junior Achievement of Middle America	\$5,000

The standing grants paid since August 1, 2009, were reviewed and ratified:

Charlotte Street Foundation	\$5,000
Harriman-Jewell Series	\$8,500
Kansas City Ballet	\$20,000
Kansas City Symphony	\$22,500
Kemper Museum of Contemporary Art	\$9,000
Lyric Opera	\$17,000
Summerfest Concerts	\$3,000
Unicorn Theatre	\$8,000
Young Audiences/Arts Partners Program	\$12,000

Requests recommended for denial were reviewed and such denials were approved as presented.

Project reviews were presented, recommendations for continued funding of the multi-year grants were approved.

Mr. Miles presented an overview of the Foundation's funding priorities in 2010. It was determined that during 2010, the Foundation will remain committed to its existing programs and essential services; but, will add some flexibility to consider strategic opportunities that will improve services to families and strengthen non profit organizations. The Board of Directors will finalize 2010 funding recommendations at its February 2010 planning meeting.

Next, Mr. Miles presented a request from the Nelson-Atkins Museum of Art for sponsorship of an event honoring Marc Wilson's retirement and the opening of the Museum's new Egyptian Galleries. Upon motion duly made by Mr. Matheny and seconded by Mr. Smyth, the Board of Directors unanimously approved a sponsorship in the amount of \$40,000 for the reception and Egyptian Gallery viewing during the Friends of Art Tribute event for Marc Wilson.

Following the presentation of the Nelson-Atkins Museum of Art sponsorship request, Mr. Miles, Ms. Wilkerson Looney, and Ms. Beuschel left the meeting and the Board of Directors went into executive session.

There being no further business to come before the Board, upon motion duly made by Mr. Sosland and seconded by Mr. Salizzoni, the meeting was adjourned.

Approved:

Henry W. Bloch, Chairman of the Meeting

Carey Wilkerson Looney, Secretary of the Meeting

The H & R Block Foundation Cash for Champions Form

Instructions for Volunteer:

- Complete Part 1 of this fillable form
- Mail this form directly to the recipient organization.

Part 1 – Volunteer Section

Name

Employee ID

Daytime Phone Number

Work Street Address

City

State/Province

Zip

E-mail Address

Name of Charitable Organization

Contact Person

Organization's Mission

Role as a volunteer

My work began on

and was completed on

I certify that the above information is true and correct and that I receive no tangible benefits for my services

Signature of Associate

Date

I acknowledge that I am a regular full-time employee of:

☐ Tax Services

Includes: Digital Tax Solutions, H&R Block Bank and Field offices

☐ Business Services

Includes: RSM McGladrey

☐ Corporate

Includes: HRB Management, Inc.

Mail form to recipient organization

Instructions Organization:

- Complete Part 2 of this form
- Verify the applicant's hours of volunteer service.
- Send copy of the organization's 501(c)(3) tax exempt ruling.
- Mail form to the address printed below

Organization Name

Employer Identification Number

Street Address

City

State/Province

Zip

Website Address

_____ has provided a Volunteer's Name

☐ 25 hours ☐ 50 hours ☐ 75 hours ☐ 100 hours of volunteer service during a 12-month consecutive period.

I hereby certify that this organization does not knowingly discriminate on the basis of race; color, religion, gender, national origin, sexual orientation, age, disability, marital status, or status as a veteran. I further certify that no goods or services will be provided to The H & R Block Foundation in consideration of the matching gift.

Signature of Officer of Organizations

Officer's Name and Title

Date

Recipient Organization should mail completed form and copy of organization's 501(c)(3) tax exempt ruling to:

**The H & R Block Foundation
One H&R Block Way
Kansas City, MO 64105**

For more information contact:

**The H & R Block Foundation
Phone: (816) 854-4361
Fax: (816) 854-8025
foundation@hrblock.com**



**H&R BLOCK[®]
foundation**

For more information go to www.hrblockfoundation.org

The H & R Block Foundation Cash For Champions Form

A Matching Gift Program for Volunteers

PROGRAM OVERVIEW

H&R Block, Inc. and its subsidiaries believe in civic involvement and volunteerism. We are committed to good corporate citizenship through community service and believe that dedication and effort by community volunteers deserve recognition.

Teamwork and group effort are an important part of the H&R Block success story. Through group efforts, associates have achieved exceptional business accomplishments. This approach can also help nonprofit organizations. For this reason, The H & R Block Foundation established the Cash for Champions Program. When an eligible associate provides 25 hours of volunteer service to a nonprofit organization within a 12-consecutive-month period, The H & R Block Foundation will match that commitment with a gift of \$100 to the organization.

Each qualified associate is eligible to have a maximum of \$400 (100 volunteer hours) matched by the Foundation during any calendar year.

WHO MAY PARTICIPATE?

To be a donor of volunteer services eligible for matching gifts under the Program (an 'Eligible Donor'), a person must (a) be a regular full time employee* of (i) any direct or indirect subsidiary of H&R Block, Inc. ('Block'), or (ii) McGladrey & Pullen, LLP (an accounting firm in which H&R Block, Inc. has no direct or indirect ownership interest, but with which an indirect subsidiary of H&R Block, Inc. has a contractual relationship), and (b) not be an officer of Block or any such subsidiary, or an officer or partner of McGladrey & Pullen, LLP on the date of The H & R Foundation's receipt of such employee's completed and executed verification form.

** A regular full-time employee of H&R Block is an associate who works five days a week, eight hours per day on a non-seasonal continuing basis.*

HOW DO I PARTICIPATE IN THE CASH FOR CHAMPIONS PROGRAM?

To qualify for a Cash For Champions matching gift, an associate must provide 25 hours of volunteer service to a qualified organization within a 12-consecutive-month period.

The associate must then complete Part 1 of the application provided in this brochure and send it to the charitable organization for completion of Part 2. When the application is received by The H & R Block Foundation and the gift is approved, a check will be sent to the specified agency on behalf of the associate. A confirmation e-mail will be sent to the associate.

Final determination of eligibility is made by The H & R Block Foundation.

WHAT ORGANIZATIONS ARE ELIGIBLE FOR CASH FOR CHAMPIONS?

Nonprofit agencies recognized by the Internal Revenue Service as exempt from Federal income taxes pursuant to Section 501(c)(3) of the Internal Revenue Code and not classified as a private foundation within the meaning of Section 509 of the Code.

A registered charity under Canada's Income Tax Act determined in good faith by the Foundation to be an organization described in the U.S. Internal Revenue Code Section 501(c)(3) and 509(a)(1), (2), or (3).

ARE THERE ORGANIZATIONS OR VOLUNTEER ACTIVITIES THAT ARE NOT ELIGIBLE FOR CASH FOR CHAMPIONS?

Yes. They include:

- Religious, fraternal, political, veterans, and trade organizations.
- Private foundations.
- Volunteer activities that are athletic in nature (including but not limited to, organizing, sponsoring or coaching athletic teams or events).
- Volunteer activities that are performed during the associate's regular business hours
- Organizations that knowingly discriminate on the basis of race, color, religion, gender, national origin, sexual orientation, age, disability, marital status, or status as a veteran.

WHOM SHOULD I CONTACT WITH QUESTIONS?

If you have any questions regarding The H & R Block Foundation's Cash for Champions Program, please contact:

The H & R Block Foundation
One H&R Block Way
Kansas City, Missouri 64105
Phone: (816) 854-4361 foundation@hrblock.com

Instructions

Donor:

- Complete Part 1 of this fillable form.
- Mail this form, along with your gift, directly to the recipient organization.

Part 1 – Donor Section

Donor Name

Employee ID Number

Daytime Telephone

Street Address

City

State/Province

Zip

☐ I prefer that my gift be Restricted to

☐ I prefer that my gift be Unrestricted

I hereby affirm that this gift has been made in the amount and in the form described above, and authorize the recipient to report this gift to The H & R Block Foundation to apply for a matching gift under the Foundation's Matching Gift Program.

Donor Signature

Date

I acknowledge that I am a regular full time employee of:

☐ **Tax Services**

Includes: Digital Tax Solutions and Field offices

☐ **Business Services**

Includes: Managing Director or more senior officer of RSM McGladrey

☐ **Corporate**

Includes: HRB Management

☐ **Consumer Financial Services**

Includes: H&R Block Bank

Mail this form, along with your gift, directly to the recipient organization.

Instructions

Recipient Organization:

- Verify the gift.
- Complete Part 2 of this form. Please type.
- Forward form to the address printed below.

Part 2 – Recipient Section

Organization Name

Employer Identification Number

Street Address

City

State/Province

Zip

Website address

Amount of Gift

Date of Gift

Tax Deductible Amount

School Accreditation

Signature of Officer of Organization

Officer's Name and Title

Date

I hereby confirm that (i) the recipient organization has received the gift in the form and amount described above, and (ii), the above information concerning its status as an educational institution is true and correct. In addition, the Internal Revenue Service has recognized this institution as either an organization to which contributions are tax deductible or as a registered charity under Canada's Income Tax Act determined in good faith by The H&R Block Foundation to be an organization described in Internal Revenue Code sections 501(c)(3) or 509 (a)(1), (2), or (3) in anticipation of receiving The H & R Block Foundation gift.

I hereby certify that this organization does not knowingly discriminate on the basis of race, color, religion, gender, national origin, sexual orientation, age, disability, marital status, or status as a veteran. I further certify that no goods or services will be provided to The H&R Block Foundation in consideration of the matching gift.

Recipient organization should mail completed form to address below:

The H&R Block Foundation
One H&R Block Way
Kansas City, MO 64105

For more information contact:
The H&R Block Foundation
Phone: (816) 854-4361
foundation@hrblock.com

The H&R Block Foundation Matching Gift Program

PROGRAM OVERVIEW

H&R Block, Inc. strongly believes in civic involvement and corporate responsibility. One of the ways this commitment is demonstrated is through The H & R Block Foundation Matching Gift Program. The Matching Gift Program gives eligible associates of H&R Block subsidiaries an opportunity to determine how Foundation funds are allocated and allows associates to make significantly larger charitable contributions to educational institutions.



WHO MAY PARTICIPATE? Your charitable contributions may be eligible for matching if you are

- A regular full-time employee* of H&R Block Services and its direct and indirect subsidiaries, HRB Management, Inc., and Block Financial Corporation;
- An employee who serves as a Managing Director of any other direct or indirect subsidiary
- * *A regular full-time employee of H&R Block is an associate who works five days a week, eight hours per day on a non-seasonal continuing basis*

HOW DO I PARTICIPATE IN THE PROGRAM? Complete and sign Section 1 of the Matching Gift form. Send it, along with your gift, to the eligible educational organization you have chosen to receive your gift.

The organization must complete and sign Section 2 of the form to confirm its eligibility and receipt of your gift and forward it to the Foundation.

The H & R Block Foundation will send a matching gift to each eligible organization and notify you that your gift has been matched.

WHAT GIFTS ARE ELIGIBLE FOR MATCHING FUNDS? Gifts must be paid, not merely pledged. Your gift must be cash or a check in the amount of \$100 or more, or stocks or bonds that have a market value of \$100 or more. The Foundation matches gifts on a one-to-one ratio.

IS THERE A LIMIT ON THE AMOUNT OF MATCHING GIFTS? Each qualified individual is eligible to have up to \$1,000 in gifts matched each calendar year. Once your gifts total \$1,000, additional gifts that are made in the same year will not be eligible for a matching gift.

WHAT ORGANIZATIONS MAY RECEIVE MATCHING GIFTS? Three types of organizations are eligible:

A college or university located in the United States which is accredited by one of the following regional accrediting agencies: Middle States Association of Colleges and Schools, North Central Association of Colleges and Secondary Schools, New England Association of Schools and Colleges, Northwestern Association of Schools and Colleges, Southern Association of Colleges and Schools, or Western Association of Schools and Colleges, or a school listed as an institution of higher education in the Higher Education Directory (published by Higher Education Publications, Inc.),

A college or university located in Canada which is listed as an institution of higher education in the most recent edition of Directory of Canadian Universities (published by the Association of Universities and Colleges of Canada),

A nonprofit private or independent secondary school located in the United States or Canada which is accredited by one of the regional agencies listed above, or by an accrediting program approved by the National Association of Independent Schools (NAIS); or listed as an independent or secondary school in the most recent edition of Schools Abroad of Interest to Americans, or The Handbook of Private Schools, (both published by Porter Sargent Publishers, Inc., Boston, Massachusetts) or The International Registry of Regionally Accredited Schools, (published by CORSAC) or Private Independent Schools (published by Bunting and Lyon, Inc., Wallingford, Connecticut),

For Canadian organizations, the Internal Revenue Service must recognize the recipient institution as either an organization to which contributions are tax-deductible or as a registered charity under Canada's Income Tax Act determined in good faith by The H & R Block Foundation to be an organization described in Internal Revenue Code sections 501(c)(3) or 509(a)(1), (2), or (3).

ARE THERE CONTRIBUTIONS THAT ARE INELIGIBLE FOR MATCHING GIFTS? Contributions ineligible for matching include: (1) payments for tuition, books, loans, or student fees; (2) subscriptions for publications; (3) pooled gifts made by an eligible donor on behalf of ineligible contributors; (4) unpaid pledges; (5) gifts for which the matching funds would provide more than the incidental benefit of recognition for the gift to the donor or the donor's family.

WHOM SHOULD I CONTACT WITH QUESTIONS? If you have any questions regarding The H&R Block Foundation's Matching Gift Program, please contact

The H&R Block Foundation
One H&R Block Way
Kansas City, Missouri 64105
(816) 854-4361
(816) 854-8025 (fax)
foundation@hrblock.com

H&R BLOCK
foundation



Henry W. Bloch National Award for Outstanding Community Service

Sponsored by the H&R Block Foundation

Instructions:

- Save a copy of the file to your desktop
- This is an electronically fillable form, please only use this form
- E-mail completed form to foundation@hrblock.com **no later than Friday, June 11, 2010**

Contact Information

Nominee Information:

Name

Employee ID

Work Street Address

City

State

Zip

E-mail Address

Phone Number

I am a:

- ☐ Full-time, regular H&R Block associate
☐ Please check box if you are FSO-KC associate
- ☐ Seasonal or part-time H&R Block associate
- ☐ Full-time or part-time associate with RSM McGladrey

Nominee's Supervisor Information:

Name

E-mail Address

Phone Number

Nominator Information:

- ☐ Self ☐ Other, please provide contact information

Name

E-mail Address

Phone Number

Community Service Activities

For each organization describe how the nominee demonstrates exceptional volunteer service by addressing the following:

- Benefits the organization or community
- Inspires others by example
- Commits personal time; include time, years and leadership

Organization 1

Organization Name

Contact Name and Title

E-mail Address

Phone Number

Henry W. Bloch National Award for Outstanding Community Service

Sponsored by The Henry W. Bloch Foundation

Organization 2

Organization Name

Contact Name and Title

E-mail Address

Phone Number

All other Organizations

Include any additional organizations and a brief description of volunteer service

Organization 3

Organization Name

Contact Name and Title

E-mail Address

Phone Number

Corporate Service

Describe how nominee demonstrates exceptional corporate service by addressing the following:

- Reflects Corporate Values: *Client Focused, Excellence, Integrity, Respect, and Teamwork*

The H & R Block Foundation Scholarship Program

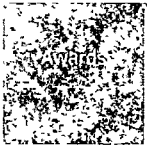
- Applications available February 1
- Applications postmarked April 1



The H & R Block Foundation Scholarship Program was established in 1975 to make grants to assist academically capable children of qualified employees of H&R Block, Inc. and its direct and indirect subsidiaries in furthering their education at accredited post-secondary, degree-granting educational institutions.

Evaluation includes academic capability, participation in school and community activities, work experience, a statement of educational and career goals, unusual personal or family circumstances, an appraisal by someone not related to the student, and who has a parent or guardian who meets employment requirements described on the next page. Once the recipients are selected, the family's financial information is assessed to determine the amount of each award.

Under U.S. Internal Revenue Service regulations covering sponsored scholarship programs such as The H & R Block Foundation Scholarship Program, recipients must be selected impartially. To satisfy this requirement, The H & R Block Foundation has retained Scholarship America to oversee and manage the program. Scholarship America is a national nonprofit educational support and student aid service organization that offers complete administrative services for corporations, foundations, and others who wish to support higher education through grants to students.



Scholarships will be awarded in variable amounts from \$1,000 to \$2,000. In order to assure fuller racial minority participation in the program, a minimum number of grants are designated for awards to minority students. The number of grants awarded to eligible minority applicants will be in direct proportion to the total number of eligible applications received. Under the program, a "racial minority" is defined as an individual who has at least one natural parent who is not Caucasian.

A restricted scholarship has been established for each of five institutions located in the Kansas City metropolitan area: Avila University, Kansas City Art Institute, Rockhurst University, University of Missouri-Kansas City, and William Jewell College. A restricted award, in memory of Roman Halajko, former Assistant Vice President and Regional Director of H&R Block Canada, Inc., has been established. This scholarship will be awarded to the most deserving Canadian applicant each year. If any of the above mentioned restricted grants are not awarded by Scholarship America, the scholarship will become unrestricted and awarded accordingly.

Final selection of scholarship recipients will be made by Scholarship America. Selection is not made by any company or foundation employee, officer, or director.



Academic Requirements for Applicant:

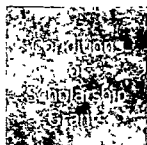
1. A cumulative grade point average of at least 2.0 on a scale in which 4.0 is equivalent to a grade of A;
2. Graduate of a secondary school or a candidate for graduation at the time of application for a scholarship; and,
3. Must have met or have the apparent ability to meet the requirements for admission to a post-secondary, degree-granting educational institution, or already be enrolled in such an institution.

Employment Requirements for Parent or Guardian of Scholarship Applicant:

To be eligible, an individual must also be the child of a qualified employee of (a) H&R Block Services and its direct or indirect subsidiaries, HRB Management, Inc., H&R Block Bank, H&R Block Digital Tax Solutions, LLC, H&R Block Financial Advisors, Inc., H&R Block Mortgage Corporation, or Block Financial Corporation; (b) the child of a qualified franchisee of any direct or indirect subsidiary of H&R Block, Inc., (c) the child of a qualified employee of such qualified franchisee, or (d) the child of a qualified employee of McGladrey & Pullen, LLP (an accounting firm in which H&R Block, Inc. has no direct or indirect ownership interest, but with which an indirect subsidiary of H&R Block, Inc. has a contractual relationship.) A "qualified franchisee" is a franchisee of any direct or indirect subsidiary of H&R Block, Inc., who is in good standing on the date that applications for grants are due and on the date grants are awarded. "Child" shall include natural children, adopted children, stepchildren, and legal wards.

The term "qualified employee" includes:

1. Full-time employees who are employed and in good standing both on the date that applications for grants are due and the date grants are awarded;
2. Employees employed in the preparation of tax returns who are employed only during the tax season and who, if not actively employed when applications for grants are due and grants are awarded, were employees in good standing at the close of the last tax season prior to such dates and are eligible for reemployment; and,
3. Part-time employees who do not qualify under (1) or (2) and who, if not actively employed at the time applications for grants are due and awarded, were employed for at least 100 days during the 12 months preceding such dates and who are in good standing and eligible for rehire.



Grantee must be a full-time student, defined as full-time enrollment for the entire upcoming academic year, pursuing a course of study as a candidate for a degree at an accredited post-secondary, degree-granting educational institution.

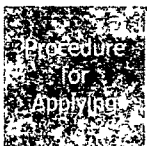
Grants shall be utilized only to defray expenses which are actually and necessarily incurred by the grantee during the period for which the scholarship is granted in attending the educational institution at which he or she is enrolled and which would qualify the amount of the grant to be excluded from the gross income of the grantee.

The educational institution which disburses the funds must agree to pay the funds to the grantee only if the grantee is enrolled at such institution and his or her standing at such educational institution is consistent with the purposes and conditions of the grant.

For the purpose of enabling Scholarship America to determine that the recipients of grants have performed the activities the grants are intended to finance, each grantee shall, if requested by Scholarship America, submit a report of the courses the grantee has taken and the grades received. This report shall be verified by the educational institution at which the grantee is enrolled.

No grant made under this program shall renew automatically. An individual who previously received a grant under this program may reapply to the scholarship program each year provided eligibility requirements continue to be met.

The grantee's standing at the educational institution at which he or she is enrolled must be consistent with the purposes and conditions of the grant originally made. All reports required as a condition of the original grant must have been received, and Scholarship America must not have received information indicating that the original grant was used for any purpose other than that for which it was made.



Each applicant is responsible for gathering and submitting all information necessary for Scholarship America to select scholarship recipients. The procedure is:

1. Link to the online application through the Foundation's website www.hrblockfoundation.org.
2. Complete the online application and submit the following documents: High school seniors must include your official high school transcript with your completed application. Students currently or previously enrolled in college or vocational technical schools must include all college or vo-tech transcripts from each previously attended post-secondary school with your completed application. On-line transcripts and grade reports are not acceptable.
3. Scholarship America will send an e-mail acknowledgment upon receipt of your completed application to the applicant's e-mail address or, if unavailable, a postcard will be sent by mail to the applicant's home address. If you do not receive such an acknowledgment within several weeks, call Scholarship America at 1-800-537-4180.
5. Scholarship awards, as determined by Scholarship America, will be announced in mid-June. All applicants will be notified whether or not they have been selected to receive an award.

Questions regarding the scholarship program should be addressed to:

The H & R Block Foundation Scholarship Program
Scholarship Management Services, Scholarship America
One Scholarship Way
P. O. Box 297
Saint Peter, MN 56082

Toll-free telephone: 1-800-537-4180 ext 418

Form **8868**

(Rev. April 2009)

Department of the Treasury
Internal Revenue Service**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

▶ File a separate application for each return.

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box ☒ **X**
 - If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

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

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

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

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

Type or print	Name of Exempt Organization	Employer identification number
	H&R BLOCK FOUNDATION	23-7378232
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. ONE H&R BLOCK WAY	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. KANSAS CITY, MO 64105	

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

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

DAVID MILES

- The books are in the care of ▶ **ONE H&R BLOCK WAY - KANSAS CITY, MO 64105**
Telephone No. ▶ **816-753-6900** FAX No. ▶

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

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

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

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	17,030.
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	68,954.
c	Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

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

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

Form 8868 (Rev. 4-2009)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	H&R BLOCK FOUNDATION	23-7378232
	Number, street, and room or suite no. If a P.O. box, see instructions.	For IRS use only
	ONE H&R BLOCK WAY	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	KANSAS CITY, MO 64105	

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

- | | | | | | |
|--------------------------------------|---|---|--------------------------------------|------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 5227 | <input type="checkbox"/> Form 8870 |
| <input type="checkbox"/> Form 990-BL | <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 4720 | <input type="checkbox"/> Form 6089 | |

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

- The books are in the care of
- ▶ ONE H&R BLOCK WAY - KANSAS CITY, MO 64105**

Telephone No. **▶ 816-753-6900**FAX No. **▶**

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

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010.**5 For calendar year **2009**, or other tax year beginning **_____**, and ending **_____**.6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

ADDITIONAL TIME IS NEEDED TO FILE A COMPLETE AND ACCURATE RETURN. THE TAXPAYER HAS NOT RECEIVED ALL K-1S FROM OUTSIDE REPORTING ENTITIES.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	17,030.
b If this application is for Form 990-PF, 990-T, 4720, or 6089, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	68,954.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

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

Signature **▶**Title **▶**Date **▶**