



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



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

OMB No 1545-0052

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, 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

THE STUCKEMAN FOUNDATION

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

20 STANWIX STREET

Room/suite

650

City or town, state, and ZIP code

PITTSBURGH, PA 15222-4801

A Employer identification number

25-1757468

B Telephone number

412-261-0779

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 ☐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)

\$ 3,717,269. (Part I, column (d) must be on cash basis.)

J Accounting method ☒ Cash ☐ Accrual☐ Other (specify)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 ☐**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                                                 |           |          | N/A      |             |
|                                                          | 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B |           |          |          |             |
|                                                          | 3 Interest on savings and temporary cash investments                                           |           |          |          |             |
|                                                          | 4 Dividends and interest from securities                                                       | 134,715.  | 134,715. |          | STATEMENT 1 |
|                                                          | 5a Gross rents                                                                                 |           |          |          |             |
|                                                          | b Net rental income or (loss)                                                                  |           |          |          |             |
|                                                          | 6a Net gain or (loss) from sale of assets not on line 10                                       | <94,654.> |          |          |             |
|                                                          | b Gross sales price for all assets on line 6a                                                  | 707,218.  |          |          |             |
|                                                          | 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 Total. Add lines 1 through 11                         | 40,061.                                                                                        | 134,715.  |          |          |             |
| Operating and Administrative Expenses                    | 13 Compensation of officers, directors, trustees, etc                                          | 11,931.   | 11,931.  |          | 0.          |
|                                                          | 14 Other employee salaries and wages                                                           |           |          |          |             |
|                                                          | 15 Pension plans, employee benefits                                                            |           |          |          |             |
|                                                          | 16a Legal fees STMT 2                                                                          | 2,003.    | 2,003.   |          | 0.          |
|                                                          | b Accounting fees                                                                              |           |          |          |             |
|                                                          | c Other professional fees                                                                      |           |          |          |             |
|                                                          | 17 Interest                                                                                    |           |          |          |             |
|                                                          | 18 Taxes STMT 3                                                                                | 4,222.    | 4,222.   |          | 0.          |
|                                                          | 19 Depreciation and depletion                                                                  |           |          |          |             |
|                                                          | 20 Occupancy                                                                                   |           |          |          |             |
|                                                          | 21 Travel, conferences, and meetings                                                           |           |          |          |             |
|                                                          | 22 Printing and publications                                                                   |           |          |          |             |
|                                                          | 23 Other expenses                                                                              |           |          |          |             |
|                                                          | 24 Total operating and administrative expenses. Add lines 13 through 23                        | 18,156.   | 18,156.  |          | 0.          |
|                                                          | 25 Contributions, gifts, grants paid                                                           | 170,000.  |          |          | 170,000.    |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 188,156.                                                                                       | 18,156.   |          | 170,000. |             |
| 27 Subtract line 26 from line 12                         |                                                                                                |           |          |          |             |
| a Excess of revenue over expenses and disbursements      | <148,095.>                                                                                     |           |          |          |             |
| b Net investment income (if negative, enter -0-)         |                                                                                                | 116,559.  |          |          |             |
| c Adjusted net income (if negative, enter -0-)           |                                                                                                |           | N/A      |          |             |

5

**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 |
| <b>Assets</b>                                     | 1 Cash - non-interest-bearing                                                             | 7,407.            |                |                       |
|                                                   | 2 Savings and temporary cash investments                                                  | 694,647.          | 1,081,461.     | 1,081,461.            |
|                                                   | 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 STMT 4                                                    | 2,738,378.        | 2,210,876.     | 2,635,808.            |
|                                                   | c Investments - corporate bonds                                                           |                   |                |                       |
| <b>Liabilities</b>                                | 11 Investments - land, buildings, and equipment basis ▶                                   |                   |                |                       |
|                                                   | Less accumulated depreciation ▶                                                           |                   |                |                       |
|                                                   | 12 Investments - mortgage loans                                                           |                   |                |                       |
|                                                   | 13 Investments - other                                                                    |                   |                |                       |
|                                                   | 14 Land, buildings, and equipment basis ▶                                                 |                   |                |                       |
|                                                   | Less accumulated depreciation ▶                                                           |                   |                |                       |
|                                                   | 15 Other assets (describe ▶ )                                                             |                   |                |                       |
|                                                   | 16 Total assets (to be completed by all filers)                                           | 3,440,432.        | 3,292,337.     | 3,717,269.            |
|                                                   | 17 Accounts payable and accrued expenses                                                  |                   |                |                       |
|                                                   | 18 Grants payable                                                                         |                   |                |                       |
| <b>Net Assets or Fund Balances</b>                | 19 Deferred revenue                                                                       |                   |                |                       |
|                                                   | 20 Loans from officers, directors, trustees, and other disqualified persons               |                   |                |                       |
|                                                   | 21 Mortgages and other notes payable                                                      |                   |                |                       |
|                                                   | 22 Other liabilities (describe ▶ )                                                        |                   |                |                       |
| 23 Total liabilities (add lines 17 through 22)    | 0.                                                                                        | 0.                |                |                       |
| <b>Net Assets or Fund Balances</b>                | Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>                   |                   |                |                       |
|                                                   | 24 Unrestricted and complete lines 24 through 26 and lines 30 and 31.                     |                   |                |                       |
|                                                   | 25 Temporarily restricted                                                                 |                   |                |                       |
|                                                   | 26 Permanently restricted                                                                 |                   |                |                       |
|                                                   | Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> |                   |                |                       |
|                                                   | 27 Capital stock, trust principal, or current funds                                       | 0.                | 0.             |                       |
|                                                   | 28 Paid-in or capital surplus, or land, bldg, and equipment fund                          | 0.                | 0.             |                       |
|                                                   | 29 Retained earnings, accumulated income, endowment, or other funds                       | 3,440,432.        | 3,292,337.     |                       |
| 30 Total net assets or fund balances              | 3,440,432.                                                                                | 3,292,337.        |                |                       |
| 31 Total liabilities and net assets/fund balances | 3,440,432.                                                                                | 3,292,337.        |                |                       |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 3,440,432. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | <148,095.> |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                            | 3 | 0.         |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 3,292,337. |
| 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 | 3,292,337. |

**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,<br>2-story brick warehouse, or common stock, 200 shs MLC Co.) | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                   |                                                  |                                      |                                  |
| b SEE ATTACHED STATEMENT                                                                                                             |                                                  |                                      |                                  |
| c                                                                                                                                    |                                                  |                                      |                                  |
| d                                                                                                                                    |                                                  |                                      |                                  |
| e                                                                                                                                    |                                                  |                                      |                                  |

  

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a                     |                                            |                                                 |                                              |
| b                     |                                            |                                                 |                                              |
| c                     |                                            |                                                 |                                              |
| d                     |                                            |                                                 |                                              |
| e 707,218.            |                                            | 801,872.                                        | <94,654.>                                    |

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<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any | (l) Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |
|------------------------|--------------------------------------|-----------------------------------------------|----------------------------------------------------------------------------------------------|
| a                      |                                      |                                               |                                                                                              |
| b                      |                                      |                                               |                                                                                              |
| c                      |                                      |                                               |                                                                                              |
| d                      |                                      |                                               |                                                                                              |
| e                      |                                      |                                               | <94,654.>                                                                                    |

  

|                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 Capital gain net income or (net capital loss)                                                                                                                               | <div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           If gain, also enter in Part I, line 7<br/>           If (loss), enter -0- in Part I, line 7         </div> <div style="margin-left: 10px;">           2 &lt;94,654.&gt; </div> </div> |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c)<br>If (loss), enter -0- in Part I, line 8 | <div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           3 N/A         </div> </div>                                                                                                                                                           |

**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<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col (b) divided by col (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|--------------------------------------------------------|
| 2008                                                              | 208,047.                              | 3,301,337.                                | .063019                                                |
| 2007                                                              | 71,500.                               | 1,621,766.                                | .044088                                                |
| 2006                                                              | 72,000.                               | 1,498,551.                                | .048046                                                |
| 2005                                                              | 65,500.                               | 1,441,837.                                | .045428                                                |
| 2004                                                              | 57,000.                               | 1,319,493.                                | .043198                                                |

  

|                                                                                                                                                                                                                       |              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| 2 Total of line 1, column (d)                                                                                                                                                                                         | 2 .243779    |
| 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 .048756    |
| 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5                                                                                                                                        | 4 3,327,177. |
| 5 Multiply line 4 by line 3                                                                                                                                                                                           | 5 162,220.   |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                                                          | 6 1,166.     |
| 7 Add lines 5 and 6                                                                                                                                                                                                   | 7 163,386.   |
| 8 Enter qualifying distributions from Part XII, line 4<br>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<br>See the Part VI instructions | 8 170,000.   |

**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<br>Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions) |    | 1      | 1,166. |
| 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                                                                         |    |        |        |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)                                                                                                             |    | 2      | 0.     |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                          |    | 3      | 1,166. |
| 3 Add lines 1 and 2                                                                                                                                                                                                                  |    | 4      | 0.     |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                        |    | 5      | 1,166. |
| 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                            |    |        |        |
| 6 Credits/Payments                                                                                                                                                                                                                   |    |        |        |
| a 2009 estimated tax payments and 2008 overpayment credited to 2009                                                                                                                                                                  | 6a | 1,933. |        |
| 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  | 1,933. |        |
| 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 | 767.   |        |
| 11 Enter the amount of line 10 to be Credited to 2010 estimated tax                                                                                                                                                                  | 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)?<br>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  |
| c 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:<br>(1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input 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 type="checkbox"/> \$ 0.                                                                                                                                                                      |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>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?<br>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:<br>• By language in the governing instrument, or<br>• 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?<br>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)<br>PA                                                                                                                                                                                                                                |     |    |
| b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation                                                                                                                              | 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  |

Form 990-PF (2009)

**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?<br>Website address ► N/A                                            | 13 |  |   |

14 The books are in care of ► **SMITHFIELD TRUST COMPANY** Telephone no ► **412-261-0779**  
 Located at ► **20 STANWIX STREET, SUITE 650, PITTSBURGH, PA** ZIP+4 ► **15222-4801**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐  
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Yes                                                                 | No   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|------|
| 1a During the year did the foundation (either directly or indirectly)                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                     |      |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |      |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |      |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                        | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |      |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                              | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |      |
| (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?                                                                                                                                                                                                                                                                                                                                                     | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |      |
| (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)                                                                                                                                                                                                                                                   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |      |
| b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here                                                                                                                                                                          | N/A                                                                 | 1b   |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?                                                                                                                                                                                                                                                                                                         |                                                                     | 1c 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 |

Form 990-PF (2009)

**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

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

If "Yes" to 6b, file Form 8870

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

N/A

**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 STATEMENT 5      |                                                           | 11,931.                                   | 0.                                                                    | 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

Form 990-PF (2009)

**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 |
|-------------------------------------------------------------|---------------------|------------------|
| NONE                                                        |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |

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 NONE |          |
|        | 0.       |
| 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                                                      |        |
|                                                        |        |
| <b>Total.</b> Add lines 1 through 3                    | 0.     |

Form 990-PF (2009)



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

|          |                                                                                                            |           |            |
|----------|------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes |           |            |
| <b>a</b> | Average monthly fair market value of securities                                                            | <b>1a</b> | 2,421,758. |
| <b>b</b> | Average of monthly cash balances                                                                           | <b>1b</b> | 956,087.   |
| <b>c</b> | Fair market value of all other assets                                                                      | <b>1c</b> |            |
| <b>d</b> | Total (add lines 1a, b, and c)                                                                             | <b>1d</b> | 3,377,845. |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)  | <b>1e</b> | 0.         |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                       | <b>2</b>  | 0.         |
| <b>3</b> | Subtract line 2 from line 1d                                                                               | <b>3</b>  | 3,377,845. |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)  | <b>4</b>  | 50,668.    |
| <b>5</b> | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4       | <b>5</b>  | 3,327,177. |
| <b>6</b> | Minimum investment return. Enter 5% of line 5                                                              | <b>6</b>  | 166,359.   |

**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)

|           |                                                                                                    |           |          |
|-----------|----------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b>  | Minimum investment return from Part X, line 6                                                      | <b>1</b>  | 166,359. |
| <b>2a</b> | Tax on investment income for 2009 from Part VI, line 5                                             | <b>2a</b> | 1,166.   |
| <b>b</b>  | Income tax for 2009 (This does not include the tax from Part VI)                                   | <b>2b</b> |          |
| <b>c</b>  | Add lines 2a and 2b                                                                                | <b>2c</b> | 1,166.   |
| <b>3</b>  | Distributable amount before adjustments. Subtract line 2c from line 1                              | <b>3</b>  | 165,193. |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions                                          | <b>4</b>  | 0.       |
| <b>5</b>  | Add lines 3 and 4                                                                                  | <b>5</b>  | 165,193. |
| <b>6</b>  | Deduction from distributable amount (see instructions)                                             | <b>6</b>  | 0.       |
| <b>7</b>  | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 165,193. |

**Part XII** Qualifying Distributions (see instructions)

|          |                                                                                                                                   |           |          |
|----------|-----------------------------------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes.                                        |           |          |
| <b>a</b> | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26                                                     | <b>1a</b> | 170,000. |
| <b>b</b> | Program-related investments - total from Part IX-B                                                                                | <b>1b</b> | 0.       |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                         | <b>2</b>  |          |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the                                                               |           |          |
| <b>a</b> | Suitability test (prior IRS approval required)                                                                                    | <b>3a</b> |          |
| <b>b</b> | Cash distribution test (attach the required schedule)                                                                             | <b>3b</b> |          |
| <b>4</b> | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                        | <b>4</b>  | 170,000. |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b | <b>5</b>  | 1,166.   |
| <b>6</b> | Adjusted qualifying distributions. Subtract line 5 from line 4                                                                    | <b>6</b>  | 168,834. |

**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.

Form 990-PF (2009)

**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                            | (a)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2009 from Part XI, line 7                                                                                                                       |               |                            |             | 165,193.    |
| 2 Undistributed income, if any, as of the end of 2009                                                                                                                      |               |                            |             |             |
| a Enter amount for 2008 only                                                                                                                                               |               |                            | 35,593.     |             |
| b Total for prior years                                                                                                                                                    |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2009                                                                                                                          |               |                            |             |             |
| a From 2004                                                                                                                                                                |               |                            |             |             |
| b From 2005                                                                                                                                                                |               |                            |             |             |
| c From 2006                                                                                                                                                                |               |                            |             |             |
| d From 2007                                                                                                                                                                |               |                            |             |             |
| e From 2008                                                                                                                                                                |               |                            |             |             |
| f Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| 4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 170,000.                                                                                                    |               |                            |             |             |
| a Applied to 2008, but not more than line 2a                                                                                                                               |               |                            | 35,593.     |             |
| 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                                                                                                                                     |               |                            |             | 134,407.    |
| e Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| 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                                                                                                                          | 0.            |                            |             |             |
| 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                                                                |               |                            |             | 30,786.     |
| 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                                                                                                 | 0.            |                            |             |             |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| 10 Analysis of line 9                                                                                                                                                      |               |                            |             |             |
| a Excess from 2005                                                                                                                                                         |               |                            |             |             |
| b Excess from 2006                                                                                                                                                         |               |                            |             |             |
| c Excess from 2007                                                                                                                                                         |               |                            |             |             |
| d Excess from 2008                                                                                                                                                         |               |                            |             |             |
| e Excess from 2009                                                                                                                                                         |               |                            |             |             |

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

[illegible]

## STUCKPF1

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

| Recipient<br>Name and address (home or business)              | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount   |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------|----------|
| <b>a</b> Paid during the year<br><b>SEE ATTACHED SCHEDULE</b> |                                                                                                                    |                                      |                                     | 170,000. |
| <b>Total</b>                                                  |                                                                                                                    |                                      | <b>3a</b>                           | 170,000. |
| <b>b</b> Approved for future payment<br><br><b>NONE</b>       |                                                                                                                    |                                      |                                     |          |
| <b>Total</b>                                                  |                                                                                                                    |                                      | <b>3b</b>                           | 0.       |





**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|---------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                              | 13000 SHS. FRONTIER COMMUNICATIONS CORP | P                                                | 07/28/08                             | 04/30/09                         |
| b                                                                                                                               | 5000 SHS. GALLAGHER ARTHUR J & CO       | P                                                | 07/28/08                             | 04/30/09                         |
| c                                                                                                                               | 2000 SHS. GENERAL ELECTRIC CO           | P                                                | 08/27/08                             | 04/30/09                         |
| d                                                                                                                               | 4000 SHS. PFIZER, INC.                  | P                                                | 07/28/08                             | 04/30/09                         |
| e                                                                                                                               | 5000 SHS. BANK OF AMERICA CORP          | P                                                | 07/28/08                             | 08/06/09                         |
| f                                                                                                                               | 4000 SHS. PFIZER, INC.                  | P                                                | 07/28/08                             | 08/06/09                         |
| g                                                                                                                               | 5000 SHS. REGAL ENTMT "A"               | P                                                | 07/28/08                             | 08/06/09                         |
| h                                                                                                                               | 1000 SHS. TELSTRA CORP                  | P                                                | 07/28/08                             | 08/06/09                         |
| i                                                                                                                               | 1000 SHS. MEDTRONIC, INC.               | D                                                | 01/02/95                             | 12/24/09                         |
| j                                                                                                                               | 1000 SHS. ROCKWELL AUTOMATION, INC.     | D                                                | 01/02/95                             | 07/16/09                         |
| k                                                                                                                               | 1500 SHS. ROCKWELL COLLINS, INC.        | D                                                | 01/02/95                             | 08/27/09                         |
| l                                                                                                                               | 1000 SHS. STRYKER CORP                  | D                                                | 01/02/95                             | 12/24/09                         |
| m                                                                                                                               |                                         |                                                  |                                      |                                  |
| n                                                                                                                               |                                         |                                                  |                                      |                                  |
| o                                                                                                                               |                                         |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 91,752.             |                                            | 152,571.                                        | <60,819.>                                    |
| b 113,498.            |                                            | 125,446.                                        | <11,948.>                                    |
| c 25,199.             |                                            | 56,480.                                         | <31,281.>                                    |
| d 53,705.             |                                            | 74,399.                                         | <20,694.>                                    |
| e 86,248.             |                                            | 144,244.                                        | <57,996.>                                    |
| f 63,238.             |                                            | 74,399.                                         | <11,161.>                                    |
| g 59,948.             |                                            | 82,368.                                         | <22,420.>                                    |
| h 14,800.             |                                            | 21,590.                                         | <6,790.>                                     |
| i 44,209.             |                                            | 17,016.                                         | 27,193.                                      |
| j 34,949.             |                                            | 13,866.                                         | 21,083.                                      |
| k 68,923.             |                                            | 31,633.                                         | 37,290.                                      |
| l 50,749.             |                                            | 7,860.                                          | 42,889.                                      |
| m                     |                                            |                                                 |                                              |
| n                     |                                            |                                                 |                                              |
| o                     |                                            |                                                 |                                              |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |                                               | (l) Losses (from col (h))<br>Gains (excess of col (h) gain over col (k),<br>but not less than "-0-") |
|---------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------|
| (i) FMV as of 12/31/69                                                                      | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col (i)<br>over col (j), if any |                                                                                                      |
| a                                                                                           |                                      |                                               | <60,819.>                                                                                            |
| b                                                                                           |                                      |                                               | <11,948.>                                                                                            |
| c                                                                                           |                                      |                                               | <31,281.>                                                                                            |
| d                                                                                           |                                      |                                               | <20,694.>                                                                                            |
| e                                                                                           |                                      |                                               | <57,996.>                                                                                            |
| f                                                                                           |                                      |                                               | <11,161.>                                                                                            |
| g                                                                                           |                                      |                                               | <22,420.>                                                                                            |
| h                                                                                           |                                      |                                               | <6,790.>                                                                                             |
| i                                                                                           |                                      |                                               | 27,193.                                                                                              |
| j                                                                                           |                                      |                                               | 21,083.                                                                                              |
| k                                                                                           |                                      |                                               | 37,290.                                                                                              |
| l                                                                                           |                                      |                                               | 42,889.                                                                                              |
| m                                                                                           |                                      |                                               |                                                                                                      |
| n                                                                                           |                                      |                                               |                                                                                                      |
| o                                                                                           |                                      |                                               |                                                                                                      |

|                                                                                                                                                                                   |   |           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------|
| 2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter "-0-" in Part I, line 7 }                                             | 2 | <94,654.> |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c)<br>If (loss), enter "-0-" in Part I, line 8 } | 3 | N/A       |

---



---

|             |                                        |           |   |
|-------------|----------------------------------------|-----------|---|
| FORM 990-PF | DIVIDENDS AND INTEREST FROM SECURITIES | STATEMENT | 1 |
|-------------|----------------------------------------|-----------|---|

---

| SOURCE                           | GROSS AMOUNT | CAPITAL GAINS<br>DIVIDENDS | COLUMN (A)<br>AMOUNT |
|----------------------------------|--------------|----------------------------|----------------------|
| SMITHFIELD TRUST CO - ACCT #1    | 21,694.      | 0.                         | 21,694.              |
| SMITHFIELD TRUST CO - ACCT #2    | 113,021.     | 0.                         | 113,021.             |
| TOTAL TO FM 990-PF, PART I, LN 4 | 134,715.     | 0.                         | 134,715.             |

---



---

|             |            |           |   |
|-------------|------------|-----------|---|
| FORM 990-PF | LEGAL FEES | STATEMENT | 2 |
|-------------|------------|-----------|---|

---

| DESCRIPTION                | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| LEGAL FEES                 | 2,003.                       | 2,003.                            |                               | 0.                            |
| TO FM 990-PF, PG 1, LN 16A | 2,003.                       | 2,003.                            |                               | 0.                            |

---



---

|             |       |           |   |
|-------------|-------|-----------|---|
| FORM 990-PF | TAXES | STATEMENT | 3 |
|-------------|-------|-----------|---|

---

| DESCRIPTION                 | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| FOREIGN TAXES               | 4,222.                       | 4,222.                            |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 18 | 4,222.                       | 4,222.                            |                               | 0.                            |

---



---

|             |                 |           |   |
|-------------|-----------------|-----------|---|
| FORM 990-PF | CORPORATE STOCK | STATEMENT | 4 |
|-------------|-----------------|-----------|---|

---

| DESCRIPTION                             | BOOK VALUE | FAIR MARKET<br>VALUE |
|-----------------------------------------|------------|----------------------|
| SECURITIES                              | 2,210,876. | 2,635,808.           |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 2,210,876. | 2,635,808.           |



---

---

|             |                                                                             |           |   |
|-------------|-----------------------------------------------------------------------------|-----------|---|
| FORM 990-PF | PART VIII - LIST OF OFFICERS, DIRECTORS<br>TRUSTEES AND FOUNDATION MANAGERS | STATEMENT | 5 |
|-------------|-----------------------------------------------------------------------------|-----------|---|

---

| NAME AND ADDRESS                                                                      | TITLE AND<br>AVRG HRS/WK | COMPEN-<br>SATION | EMPLOYEE<br>BEN PLAN CONTRIB | EXPENSE<br>ACCOUNT |
|---------------------------------------------------------------------------------------|--------------------------|-------------------|------------------------------|--------------------|
| H. CAMPBELL STUCKEMAN<br>4251 GULF SHORE BLVD NORTH, #10B<br>NAPLES, FL 34103         | TRUSTEE<br>0.00          | 0.                | 0.                           | 0.                 |
| ELLEN S. EASLEY<br>101 SOUTH VINCENNES CIRCLE<br>RACINE, WI 53402                     | TRUSTEE<br>0.00          | 0.                | 0.                           | 0.                 |
| JOYCE S. BIFFAR<br>3192 SAGE GLEN<br>ESCONDIDO, CA 92029                              | TRUSTEE<br>0.00          | 0.                | 0.                           | 0.                 |
| TRAVIS S. BIFFAR<br>26581 PASEO CALLADO<br>SAN JUAN CAPISTRANO, CA 92675              | TRUSTEE<br>0.00          | 0.                | 0.                           | 0.                 |
| CHARLES C. STUCKEMAN<br>2321 WRIGHTS WAY<br>PITTSBURGH, PA 15203                      | TRUSTEE<br>0.00          | 0.                | 0.                           | 0.                 |
| SMITHFIELD TRUST COMPANY<br>20 STANWIX STREET, SUITE 650<br>PITTSBURGH, PA 15222-4801 | TRUSTEE<br>10.00         | 11,931.           | 0.                           | 0.                 |
| TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII                                          |                          | 11,931.           | 0.                           | 0.                 |

**THE STUCKEMAN FOUNDATION****25-1757468****DECEMBER 31, 2009****ATTACHMENT TO FORM 990-PF, PART XV**

| <b>Recipient Name/Address</b>                                                                        | <b>Recipient Relationship &amp; Purpose of Grant</b> | <b>Recipient Status</b> | <b>Amount</b> |
|------------------------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------|---------------|
| American Cancer Society<br>320 Bilmar Drive<br>Pittsburgh, PA 15205                                  | None and General                                     | 501(c)(3)               | \$2000        |
| American Cancer Society -<br>Midwest Division Inc.<br>P.O. Box 776<br>Pewaukee, WI 53072             | None and General                                     | 501(c)(3)               | \$1000        |
| American Diabetes Association<br>300 Penn Center Blvd.<br>Ste. 602<br>Pittsburgh, PA 15235           | None and General                                     | 501(c)(3)               | \$1000        |
| American Heart Association<br>777 Penn Center Blvd.<br>Ste. 200<br>Pittsburgh, PA 15235              | None and General                                     | 501(c)(3)               | \$2000        |
| American Red Cross<br>225 Boulevard of the Allies<br>Pittsburgh, PA 15222                            | None and General                                     | 501(c)(3)               | \$3000        |
| Animal Friends<br>562 Camp Home Road<br>Pittsburgh, PA 15237                                         | None and General                                     | 501(c)(3)               | \$2000        |
| Animal Rescue League<br>6620 Hamilton Avenue<br>Pittsburgh, PA 15206                                 | None and General                                     | 501(c)(3)               | \$2000        |
| Boys & Girls Clubs of Western PA<br>5432 Butler Street<br>Pittsburgh, PA 15201                       | None and General                                     | 501(c)(3)               | \$3000        |
| Boy Scouts of America<br>1275 Bedford Avenue<br>Pittsburgh, PA 15219                                 | None and General                                     | 501(c)(3)               | \$2000        |
| Boy Scouts of America Southeast<br>Wisconsin Council<br>2319 Northwestern Avenue<br>Racine, WI 53404 | None and General                                     | 501(c)(3)               | \$1000        |
| Brother's Brother Foundation<br>1200 Galveston Avenue<br>Pittsburgh, PA 15233                        | None and General                                     | 501(c)(3)               | \$2000        |

**ATTACHMENT TO FORM 990-PF, PART XV (cont.)**

| <b>Recipient Name/Address</b>                                                                            | <b>Recipient Relationship &amp; Purpose of Grant</b> | <b>Recipient Status</b> | <b>Amount</b> |
|----------------------------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------|---------------|
| Carnegie Library of Pittsburgh -<br>South Side Branch<br>2205 East Carson Street<br>Pittsburgh, PA 15203 | None and General                                     | 501(c)(3)               | \$1000        |
| Carnegie Museums of Pittsburgh<br>4400 Forbes Avenue<br>Pittsburgh, PA 15213                             | None and General                                     | 501(c)(3)               | \$5000        |
| Charcott-Merrytooth Research<br>Foundation<br>2700 Chestnut Street<br>Chester, PA 19043                  | None and General                                     | 501(c)(3)               | \$5000        |
| Children's Hospital of Orange<br>County Foundation<br>455 South Main Street<br>Orange, CA 92868          | None and General                                     | 501(c)(3)               | \$1000        |
| Commonwealth Education<br>Organization<br>90 Beta Drive<br>Pittsburgh, PA 15238                          | None and General                                     | 501(c)(3)               | \$2000        |
| Elderhelp of San Diego<br>4069 30th Street<br>San Diego, CA 62104                                        | None and General                                     | 501(c)(3)               | \$2000        |
| Epilepsy Foundation of Western PA<br>1501 Reedsdale Street<br>Pittsburgh, PA 15233                       | None and General                                     | 501(c)(3)               | \$3000        |
| Escondido Humane Society<br>3450 East Valley Parkway<br>Escondido, CA 92027                              | None and General                                     | 501(c)(3)               | \$2000        |
| Escondido Salvation Army<br>1301 Las Villas Way<br>Escondido, CA 92026                                   | None and General                                     | 501(c)(3)               | \$3000        |
| Family Guidance, Inc.<br>307 Duff Road<br>Sewickley, PA 15143                                            | None and General                                     | 501(c)(3)               | \$3000        |
| Family House (Pittsburgh)<br>242 McKee Place<br>Pittsburgh, PA 15213                                     | None and General                                     | 501(c)(3)               | \$2000        |

**ATTACHMENT TO FORM 990-PF, PART XV (cont.)**

| <b>Recipient Name/Address</b>                                                                   | <b>Recipient Relationship &amp; Purpose of Grant</b> | <b>Recipient Status</b> | <b>Amount</b> |
|-------------------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------|---------------|
| First United Methodist Church of Escondido<br>341 South Kalmia Street<br>Escondido, CA 92025    | None and General                                     | 501(c)(3)               | \$8000        |
| Forbes Health Foundation<br>2570 Haymaker Road<br>Monroeville, PA 15146                         | None and General                                     | 501(c)(3)               | \$2000        |
| The Foundation Endowment<br>511 Cameron Street<br>Alexandria, VA 22314                          | None and General                                     | 501(c)(3)               | \$4000        |
| Fox Chapel Community Center & Library<br>401 Fox Chapel Road<br>Pittsburgh, PA 15238            | None and General                                     | 501(c)(3)               | \$1000        |
| Friends of the Riverfront<br>33 Terminal Way<br>Pittsburgh, PA 15219                            | None and General                                     | 501(c)(3)               | \$2000        |
| Goodwill of Orange County<br>410 North Fairview Street<br>Santa Ana, CA 92703                   | None and General                                     | 501(c)(3)               | \$1000        |
| Goodwill of Southwestern PA<br>3600 East Carson Street<br>Pittsburgh, PA 15203                  | None and General                                     | 501(c)(3)               | \$3000        |
| Greater Pittsburgh Community Food Bank<br>1 North Linden Street<br>Duquesne, PA 15110           | None and General                                     | 501(c)(3)               | \$3000        |
| Greater Pittsburgh Literacy Council<br>100 Sheridan Square<br>4th Floor<br>Pittsburgh, PA 15206 | None and General                                     | 501(c)(3)               | \$1000        |
| Habitat for Humanity, Inc.<br>1501 Villa Street<br>Racine, WI 53403                             | None and General                                     | 501(c)(3)               | \$1000        |
| Habitat for Humanity of Orange County<br>200 South Ritchey Street<br>Santa Ana, CA 92705        | None and General                                     | 501(c)(3)               | \$1000        |

**ATTACHMENT TO FORM 990-PF, PART XV (cont.)**

| <b>Recipient Name/Address</b>                                                                   | <b>Recipient Relationship &amp; Purpose of Grant</b> | <b>Recipient Status</b> | <b>Amount</b> |
|-------------------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------|---------------|
| HALO, Inc.<br>2000 DeKoven Avenue<br>Racine, WI 53403                                           | None and General                                     | 501(c)(3)               | \$1000        |
| Heinz History Center<br>1212 Smallman Street<br>Pittsburgh, PA 15222                            | None and General                                     | 501(c)(3)               | \$5000        |
| Interfaith Community Services<br>550 West Washington Avenue<br>Escondido, CA 92025              | None and General                                     | 501(c)(3)               | \$3000        |
| KLOVE<br>P.O. Box 2098<br>Omaha, NE 68103                                                       | None and General                                     | 501(c)(3)               | \$2000        |
| The Leadership Institute<br>1101 North Highland Street<br>Arlington, VA 22201                   | None and General                                     | 501(c)(3)               | \$4000        |
| Light and Life Christian School<br>120 North Ash Street<br>Escondido, CA 92025                  | None and General                                     | 501(c)(3)               | \$1000        |
| National Aviary<br>Allegheny Commons West<br>Pittsburgh, PA 15212                               | None and General                                     | 501(c)(3)               | \$3000        |
| The Nature Conservancy of Wisconsin<br>633 West Main Street<br>Madison, WI 53703                | None and General                                     | 501(c)(3)               | \$1000        |
| North Hills Community Outreach<br>1975 Ferguson Road<br>Allison Park, PA 15101                  | None and General                                     | 501(c)(3)               | \$2000        |
| Northland Public Library<br>302 Cumberland Road<br>Pittsburgh, PA 15237                         | None and General                                     | 501(c)(3)               | \$2000        |
| Palomar Family YMCA<br>1050 North Broadway<br>Escondido, CA 92026                               | None and General                                     | 501(c)(3)               | \$2000        |
| Mr. Nick Gigante<br>The Pittsburgh Cultural Trust<br>803 Liberty Avenue<br>Pittsburgh, PA 15222 | None and General                                     | 501(c)(3)               | \$5000        |

**ATTACHMENT TO FORM 990-PF, PART XV (cont.)**

| <b>Recipient Name/Address</b>                                                           | <b>Recipient Relationship &amp; Purpose of Grant</b> | <b>Recipient Status</b> | <b>Amount</b> |
|-----------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------|---------------|
| Pittsburgh Zoo & PPG Aquarium<br>One Wild Place<br>Pittsburgh, PA 15206                 | None and General                                     | 501(c)(3)               | \$3000        |
| Racine Arts Council, Inc.<br>316 Sixth Street<br>Racine, WI 53403                       | None and General                                     | 501(c)(3)               | \$2000        |
| Racine Art Museum<br>2519 Northwestern Avenue<br>Racine, WI 53404                       | None and General                                     | 501(c)(3)               | \$2000        |
| Racine Health Care Network, Inc.<br>904 State Street<br>Racine, WI 53404                | None and General                                     | 501(c)(3)               | \$2000        |
| Racine Heritage Museum<br>701 Main Street<br>Racine, WI 53403                           | None and General                                     | 501(c)(3)               | \$1000        |
| Racine Literacy Council<br>420 Seventh Street<br>Racine, WI 53403                       | None and General                                     | 501(c)(3)               | \$2000        |
| Racine Public Library<br>75 7th Street<br>Racine, WI 53403                              | None and General                                     | 501(c)(3)               | \$3000        |
| Racine Symphony Orchestra<br>P.O. Box 1751<br>Racine, WI 53401                          | None and General                                     | 501(c)(3)               | \$5000        |
| Racine Theatre Guild<br>2519 Northwestern Avenue<br>Racine, WI 53404                    | None and General                                     | 501(c)(3)               | \$1000        |
| Racine Zoological Society<br>2131 North Main Street<br>Racine, WI 53402                 | None and General                                     | 501(c)(3)               | \$5000        |
| Saint Jude Children's Research<br>Hospital<br>501 Saint Jude Place<br>Memphis, TN 38105 | None and General                                     | 501(c)(3)               | \$2000        |
| The Salvation Army<br>700 North Bell Avenue<br>Carnegie, PA 15106                       | None and General                                     | 501(c)(3)               | \$4000        |
| San Diego Habitat for Humanity<br>10222 San Diego Mission Road<br>San Diego, CA 92108   | None and General                                     | 501(c)(3)               | \$2000        |

**ATTACHMENT TO FORM 990-PF, PART XV (cont.)**

| <b>Recipient Name/Address</b>                                                                     | <b>Recipient Relationship &amp; Purpose of Grant</b> | <b>Recipient Status</b> | <b>Amount</b>           |
|---------------------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------|-------------------------|
| The Second Mile<br>3607 Rosemont Avenue<br>Ste. 501<br>Camp Hill, PA 17011                        | None and General                                     | 501(c)(3)               | \$1000                  |
| SPIN OC (Serving People in Need)<br>151 Kalmus Drive, H-2<br>Costa Mesa, CA 92626                 | None and General                                     | 501(c)(3)               | \$1000                  |
| Texas Children's Hospital<br>P.O. Box 300630, MC 4-4483<br>Houston, TX 77230                      | None and General                                     | 501(c)(3)               | \$3000                  |
| Three Rivers Young People's<br>Orchestras<br>212 Ninth Street<br>Ste. 401<br>Pittsburgh, PA 15222 | None and General                                     | 501(c)(3)               | \$2000                  |
| Trinity United Methodist Church<br>3825 Erie Street<br>Racine, WI 53402                           | None and General                                     | 501(c)(3)               | \$5000                  |
| United Way of Allegheny County<br>1250 Penn Avenue<br>Pittsburgh, PA 15230                        | None and General                                     | 501(c)(3)               | \$3000                  |
| World Affairs Council of Pittsburgh<br>501 Grant Street<br>Ste. 1175<br>Pittsburgh, PA 15219      | None and General                                     | 501(c)(3)               | \$2000                  |
| WQED Multimedia<br>4802 Fifth Avenue<br>Pittsburg, hPA 15213                                      | None and General                                     | 501(c)(3)               | \$2000                  |
| YMCA of Racine<br>725 Lake Avenue<br>Racine, WI 53403                                             | None and General                                     | 501(c)(3)               | \$3000                  |
| Young America's Foundation<br>110 Elden Street<br>Herndon, VA 20170                               | None and General                                     | 501(c)(3)               | \$3000                  |
| Young Life<br>11520 Gardenia Drive<br>Pittsburgh, PA 15235                                        | None and General                                     | 501(c)(3)               | \$3000                  |
| <b>TOTAL</b>                                                                                      |                                                      |                         | <b><u>\$170,000</u></b> |