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Form **990-PF**

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

OMB No 1545-0052

**2009**Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , and ending

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>HAROLD H. COHEN FOUNDATION CHARITABLE TRUST</b>		A Employer identification number <b>25-6084080</b>
	Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>7098 VIA GENOVA</b>		B Telephone number (see page 10 of the instructions) <b>561-637-3351</b>
	City or town, state, and ZIP code <b>DELRAY BEACH FL 33446</b>		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 148,630</b> (Part I, column (d) must be on cash basis)		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	379	379	379	
	4 Dividends and interest from securities	5,329	5,329	5,329	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns & allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	5,708	5,708	5,708		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) Stmt 1	375	375	375	
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) Stmt 2	125	125	125	
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses (att sch) Stmt 3	50	50	50		
24 Total operating and administrative expenses. Add lines 13 through 23	550	550	550	0	
25 Contributions, gifts, grants paid	7,829			7,829	
26 Total expenses and disbursements. Add lines 24 and 25	8,379	550	550	7,829	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-2,671				
b Net investment income (if negative, enter -0-)		5,158			
c Adjusted net income (if negative, enter -0-)			5,158		

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

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash—non-interest-bearing	7,913	5,242	5,242		
	2	Savings and temporary cash investments	10,000	10,000	10,000		
	3	Accounts receivable ▶					
		Less allowance for doubtful accounts ▶					
	4	Pledges receivable ▶					
		Less allowance for doubtful accounts ▶					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)					
	7	Other notes and loans receivable (att. schedule) ▶					
		Less allowance for doubtful accounts ▶					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U.S. and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule) <b>See Stmt 4</b>	124,634	124,634	133,388		
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach sch.) ▶						
12	Investments—mortgage loans						
13	Investments—other (attach schedule)						
14	Land, buildings, and equipment basis ▶						
	Less accumulated depreciation (attach sch.) ▶						
15	Other assets (describe ▶)						
16	<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	142,547	139,876	148,630			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶)					
23	<b>Total liabilities</b> (add lines 17 through 22)	0	0				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted	142,547	139,876			
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg., and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
	30	<b>Total net assets or fund balances</b> (see page 17 of the instructions)	142,547	139,876			
	31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions)	142,547	139,876			

## Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	142,547
2	Enter amount from Part I, line 27a	2	-2,671
3	Other increases not included in line 2 (itemize) ▶ <b>See Statement 5</b>	3	
4	Add lines 1, 2, and 3	4	139,876
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	139,876

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a N/A</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

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

<b>2</b> Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div> </div>	<b>2</b>	
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;">           If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions)            If (loss), enter -0- in Part I, line 8         </div> </div>	<b>3</b>	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	8,494	179,130	0.047418
2007	11,154	214,596	0.051977
2006	10,243	136,986	0.074774
2005	8,989	132,439	0.067873
2004	7,320	128,977	0.056754

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.298796
<b>3</b> 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	<b>3</b>	0.059759
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	143,885
<b>5</b> Multiply line 4 by line 3	<b>5</b>	8,598
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	52
<b>7</b> Add lines 5 and 6	<b>7</b>	8,650
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	7,829

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

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<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>	<b>103</b>
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	<b>0</b>
<b>3</b>	Add lines 1 and 2	<b>3</b>	<b>103</b>
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	<b>0</b>
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	<b>103</b>
<b>6</b>	Credits/Payments		
<b>a</b>	2009 estimated tax payments and 2008 overpayment credited to 2009	<b>6a</b>	
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>	<b>103</b>
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>	
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		<b>X</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		<b>X</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		<b>X</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <b>\$</b> _____ (2) On foundation managers <b>\$</b> _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <b>\$</b> _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		<b>X</b>
<b>3</b> 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		<b>X</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<b>X</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		<b>X</b>
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	<b>X</b>	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	<b>X</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <b>FL</b>		
<b>b</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	<b>X</b>	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	<b>X</b>	
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		<b>X</b>

N/A

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11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		<b>X</b>
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		<b>X</b>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>N/A</b>	13	<b>X</b>	
14	The books are in care of ► <b>TAXPAYER</b> <b>7098 VIA GENOVA</b> Located at ► <b>DELRAY BEACH, FL</b>	Telephone no ► <b>561-637-3551</b> ZIP+4 ► <b>33446</b>		
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		► <input type="checkbox"/>

**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 ► <input type="checkbox"/>	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	N/A	
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20	N/A	
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	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<b>X</b>
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	<b>X</b>

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

<b>5a</b>	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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A		<b>5b</b>
<b>c</b>	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? If "Yes," attach the statement required by Regulations section 53.4945-5(d)	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870			<b>6b</b> <b>X</b>
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b>	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		<b>7b</b>

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
H. H. COHEN, 7098 VIA GENOVA ADELLE COHEN 7098 VIA GENOVA	DELRAY BEACH FL 33446 DELRAY BEACH FL 33446	MANAGER 1.00 MANAGER 1.00	0 0 0 0	0 0 0 0

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

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

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

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(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

**Part IX-A Summary of Direct Charitable Activities**

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

Expenses

**1 N/A****2****3****4****Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

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

Amount

**1 N/A****2**

All other program-related investments See page 24 of the instructions

**3**

Total. Add lines 1 through 3

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	0
b	Average of monthly cash balances	1b	146,076
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	146,076
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	146,076
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	2,191
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	143,885
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	7,194

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part )

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

**Part XII Qualifying Distributions** (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	7,829
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	7,829
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	7,829

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

**Part XIII Undistributed Income** (see page 26 of the instructions)

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

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling **N/A**

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

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	<b>5,158</b>	<b>6,248</b>	<b>10,730</b>	<b>6,849</b>	<b>28,985</b>
<b>b</b> 85% of line 2a	<b>4,384</b>	<b>5,311</b>	<b>9,121</b>	<b>5,822</b>	<b>24,638</b>
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed	<b>7,829</b>	<b>8,494</b>	<b>11,154</b>	<b>10,243</b>	<b>37,720</b>
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	<b>7,829</b>	<b>8,494</b>	<b>11,154</b>	<b>10,243</b>	<b>37,720</b>
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets	<b>139,876</b>	<b>142,547</b>	<b>144,793</b>	<b>139,940</b>	<b>567,156</b>
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)	<b>139,876</b>	<b>142,547</b>	<b>144,793</b>	<b>139,940</b>	<b>567,156</b>
<b>b</b> "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) <b>N/A</b>					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) <b>N/A</b>					
<b>(3)</b> Largest amount of support from an exempt organization <b>N/A</b>					
<b>(4)</b> Gross investment income <b>N/A</b>					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )  
**NONE**

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest  
**NONE**

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**  
Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a** The name, address, and telephone number of the person to whom applications should be addressed  
**N/A**

**b** The form in which applications should be submitted and information and materials they should include  
**ANY FORM ACCEPTABLE**

**c** Any submission deadlines  
**NO DEADLINES**

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
**NO RESTRICTIONS**

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> Paid during the year <b>PER SCHEDULE</b>	<b>NONE</b>	<b>CHARITABLE</b>		<b>7,829</b>
<b>Total</b>			<b>▶ 3a</b>	<b>7,829</b>
<b>b</b> Approved for future payment <b>N/A</b>				
<b>Total</b>			<b>▶ 3b</b>	

## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions )
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					379
4	Dividends and interest from securities					5,329
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		0	5,708
13	Total. Add line 12, columns (b), (d), and (e)					5,708

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

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

[illegible]




<b>Part XVII</b>	<b>Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations</b>
------------------	--

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

[illegible]

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

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge			
 Signature of officer or trustee		4/7/10 Date	 Title
Paid Preparer's Use Only	Preparer's signature 		Date 3/18/10
	Firm's name (or yours if self-employed), address, and ZIP code Appletree & Kern, PC 9 W 34th St Erie, PA 16508-2811		Check if self-employed <input type="checkbox"/> Preparer's identifying number (see Signature on page 30 of the instructions) P00183784
		EIN <b>25-1449363</b> Phone no <b>814-455-3904</b>	

HAROLD H. COHEN --- FOUNDATION CHARITABLE TRUST FOR THE YEAR 2009											
NAME OF ORGANIZATION	ADDRESS	CITY/STATE/ZIP	DATE	CHECK #	AMOUNT						
YAD SARAH	450 Park Ave Suite 3201	NY , NY 10022	13-Jan	1619	200	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	13-Jan	1620	10	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	13-Jan	1621	10	DONATIONS					
KRAVIS Center	701 OkeechobeeBlvd	W.P.Beach, FL 33401	02-Feb	1622	75	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	02-Feb	1623	10	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	09-Feb	1624	70	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	12-Feb	1625	60	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	12-Feb	1626	20	DONATIONS					
BNAI TORAH Congregation	6261 S.W. 18 th St.	Boca Raton, FL 33433	12-Feb	1627	28	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	09-Mar	1628	36	DONATIONS					
Old School Square	51 N.Swinton Avenue	Delray Beach, FL 33428	31-Mar	1630	528	DONATIONS					
JEWISH FEDERATION	9901 Donna KlineBlvd	Boca Raton, FL 33428	01-Apr	1631	1,000	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	13-Apr	1632	25	DONATIONS					
PAP Corp for CANCER RESEARCH	3800 S Ocean Dr.	Hollywood, FL 33018	23-Apr	1635	20	DONATIONS					
Ahava Chapter of HADASSAH	7350 Viale Angelo	Delray Beach,FI 33446	20-May	1636	35	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	21-May	1637	10	DONATIONS					
TELSHE YESHIVA	28400 Euclid Ave.	Wickliffe, OH 44092	21-May	1638	10	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	02-Jun	1639	10	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	02-Jun	1640	35	DONATIONS					
JNF Jewish National Fund	78 Randall Ave	Rockville, MD 11570	03-Jun	1641	200	DONATIONS					
American DIABETES Assoc.	P.O.Box 444	Mt.Morris,IL 61054	03-Jun	1642	28	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	12-Jun	1643	180	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	16-Jun	1644	10	DONATIONS					
WXEL- BarryTelecommunication	P o BOX 6607	W.P. Beach,FL 33405	23-Jun	1645	125	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	23-Jun	1646	10	DONATIONS					
BRITH SHOLOM Congregation	3207 State St	Erie, PA 16508	13-Jul	1647	10	DONATIONS					
JNF Jewish National Fund	78 Randall Ave	Rockville, MD 11570	14-Jul	1648	36	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	15-Jul	1649	100	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	21-Jul	1650	500	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	21-Jul	1651	30	DONATIONS					
LEUKEMIA & Lymphoma Soc	210 W. St	Erie, PA 16501	22-Jul	1652	100	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	29-Jul	1653	600	DONATIONS					
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	29-Jul	1654	10	DONATIONS					
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	05-Aug	1655	10	DONATIONS					
BNAI TORAH Congregation	6261 S.W 18 th St.	Boca Raton, FL 33433	27-Aug	1656	145	DONATIONS					
BRITH SHOLOM Congregation	3207 State St	Erie, PA 16508	28-Aug	1657	10	DONATIONS					
ANTI DEFAMATION League	P.O.Box 96226	Washington DC 20090	01-Sep	1658	25	DONATIONS					

ALZHEIMER Disease Research	P.O.Box 1950	Clarkburg,MD 20871	01-Sep	1659	25	DONATIONS
America CANCER Society	P.O.Box 13300	Tampa,FL 33681	01-Sep	1660	25	DONATIONS
American Heart Assoc.	P.O.Box 78851	Phoenix, AR 85062	01-Sep	1661	25	DONATIONS
American Institute of CANCER RESEARCH	P.O.Box 97167	Washington DC 20090	01-Sep	1662	25	DONATIONS
American RED CROSS	P.O.Box 870	W.P.Beach,FL 33402	01-Sep	1663	25	DONATIONS
BNAI BRITH Foundation	P.O.Box 17305	Milwaukee,WI 53217	01-Sep	1664	25	DONATIONS
HABITAT For HUMANITY	P.O.Box 1167	Americus, GA 31709	01-Sep	1665	25	DONATIONS
HILLEL Foundation	P.O.Box 92994	Washington DC 20090	01-Sep	1666	25	DONATIONS
March of Dimes	P.O.Box 8972	Topeka, KS 66608	01-Sep	1667	25	DONATIONS
Memorial SLOAN KETTERING	P.O.Box 750	N.Y, N.Y 10131	01-Sep	1668	25	DONATIONS
Muscular DYSTROPHY Assoc	P.O.Box 78960	Phoenix, AR 85062	01-Sep	1669	25	DONATIONS
National Jewish Health	P.O.Box 5898	Denver, CO 80217	01-Sep	1670	25	DONATIONS
National MULTIPLE SCLEROSIS	P.O.Box 9807	Ft.Lauderdale, FL 33310	01-Sep	1671	25	DONATIONS
SIMON WIESENTHAL Center	1399 S.Roxbury Dr.	Los Angeles,CA 90035	01-Sep	1672	25	DONATIONS
UNITED SYNAGOGUE	P.O.Box 977	Wilton, NH 03086	01-Sep	1673	25	DONATIONS
WORLD JEWISH CONGRESS	P.O.Box 90400	Washington, DC 20090	01-Sep	1674	25	DONATIONS
BOCA HELPING HANDS	138 N W 16 th St	Boca Raton, FL 33432	01-Sep	1675	100	DONATIONS
UNITED WAY of P.B.County	2600 Quantum Blvd	Boynton Beach, FL 33426	01-Sep	1676	100	DONATIONS
Shriners Hospital for Children	P.O.Box 1510	Ranson, WV 25438	01-Sep	1677	25	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	10-Sep	1678	210	DONATIONS
Beth El Congregation of the South Hills	1900 Cochran Rd	Pittsburgh,PA 15220	15-Sep	1679	100	DONATIONS
PAP Corp for CANCER RESEARCH	3800 S.Ocean Dr.	Hollywood, FL 33018	15-Sep	1680	200	DONATIONS
JEWISH Community Council	P.O.Box 3120	Erie, PA 16508	22-Sep	1681	50	DONATIONS
Old School Square	51 N Swinton Avenue	Delray Beach, FL 33428	04-Oct	1682	50	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	04-Oct	1683	350	DONATIONS
Ahava Chapter of HADASSAH	7350 Viale Angelo	Delray Beach, FL 33446	21-Oct	1684	100	DONATIONS
Ahava Chapter of HADASSAH	7350 Viale Angelo	Delray Beach, FL 33446	21-Oct	1685	16	DONATIONS
PAP Corp for CANCER RESEARCH	3800 S Ocean Dr.	Hollywood, FL 33018	31-Oct	1686	10	DONATIONS
TELSHE YESHIVA	28400 Euclid Ave.	Wickliffe, OH 44092	03-Nov	1687	10	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	03-Nov	1688	10	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	13-Nov	1689	50	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	19-Nov	1690	189	DONATIONS
America CANCER Society	P.O.Box 13300	Tampa,FL 33681	22-Nov	1691	10	DONATIONS
BNAI TORAH Congregation	6261 S.W. 18 th St	Boca Raton, FL 33433	01-Dec	1692	168	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	09-Dec	1693	10	DONATIONS
American Frinds of MAGEN DAVID ADOM	2100 E.Hallendale Beach Blvd -Suite 205	Hallendale, FL 33009	10-Dec	1695	100	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	23-Dec	1696	10	DONATIONS
WOMENS LEAGUE for Conservative Judiasm	P.O.Box 96778	Washington,DC 20090	23-Dec	1697	25	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	24-Dec	1698	10	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	25-Dec	1699	10	DONATIONS
TEMPLE TORAH	8600 Jog Road	Boynton Beach, FL 33437	25-Dec	1700	1,150	DONATIONS
BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	29-Dec	1701	10	DONATIONS



BRITH SHOLOM Congregation	3207 State St.	Erie, PA 16508	29-Dec	1702	10	DONATIONS
US HOLOCAUST Memorial Mus.	P O Box 90988	Washington, DC 20090	30-Dec	1703	25	DONATIONS
					7,829	
US TREASURY -- IRS Taxes			13-Apr	1633	125	IRS TAXES
POSTMASTER		Delray Beach, FL	19-Mar	1629	50	POSTAGE
Appletree & Kern, PC	9 West 34 th St.	Erie, PA 16508	13-Apr	1634	375	PROF FEES
					8,379	

**Federal Statements****Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000**

Name of Manager	Amount
NONE	\$
Total	\$ 0

**Form 990-PF, Part XV, Line 1b - Managers Who Own 10% or More Stock**

Name of Manager	Amount
NONE	\$
Total	\$ 0

**Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

Description
ANY FORM ACCEPTABLE

**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

Description
NO DEADLINES

**Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

Description
NO RESTRICTIONS

## Federal Statements

25-6084080

FYE: 12/31/2009

3/18/2010 5:39 PM

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
APPLETREE & KERN PC	\$ 375	\$ 375	\$ 375	\$
Total	\$ 375	\$ 375	\$ 375	\$ 0

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
IRS TAX	\$ 125	\$ 125	\$ 125	\$
Total	\$ 125	\$ 125	\$ 125	\$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses	\$	\$	\$	\$
POSTAGE	50	50	50	
Total	\$ 50	\$ 50	\$ 50	\$ 0

**Federal Statements****Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

<u>Description</u>		<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
		\$ 124,634	\$ 124,634	Cost	\$ 133,388
Total		<u>\$ 124,634</u>	<u>\$ 124,634</u>		<u>\$ 133,388</u>

**Statement 5 - Form 990-PF, Part III, Line 3 - Other Increases**

<u>Description</u>	<u>Amount</u>
ROUNDING	\$
Total	<u>\$ 0</u>

**Federal Statements****Taxable Interest on Investments**

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business Code</u>	<u>Exclusion Code</u>	<u>Postal Code</u>
INTEREST	\$ 379			
Total	<u>\$ 379</u>			

**Taxable Dividends from Securities**

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business Code</u>	<u>Exclusion Code</u>	<u>Postal Code</u>
DIVIDENDS	\$ 5,329			
Total	<u>\$ 5,329</u>			