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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

2009Department 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 THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION | | A Employer identification number 25-6843186 |
| | Number and street (or P O box number if mail is not delivered to street address) | Room/suite | B Telephone number (see page 10 of the instructions) 717-972-1305 |
| | City or town, state, and ZIP code MECHANICSBURG PA 17055 | | 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) \$ 4,754,198 | 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) | 300,000 | | | |
| 2 Check <input 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 | 132,158 | 130,807 | | |
| 5a Gross rents | | | | |
| b Net rental income or (loss) | | | | |
| 6a Net gain or (loss) from sale of assets not on line 10 | -79,191 | | | |
| b Gross sales price for all assets on line 6a 2,921,615 | | | | |
| 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) STMT 1 | -4,176 | -4,648 | | |
| 12 Total. Add lines 1 through 11 | 348,791 | 126,159 | 0 | |
| 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 2 | 4,280 | 1,427 | | 2,853 |
| c Other professional fees (attach schedule) | | | | |
| 17 Interest | | | | |
| 18 Taxes (attach schedule) (see page 14 of the instructions) STMT 3 | 1,318 | 318 | | |
| 19 Depreciation (attach schedule) and depletion | | | | |
| 20 Occupancy | | | | |
| 21 Travel, conferences, and meetings | | | | |
| 22 Printing and publications | | | | |
| 23 Other expenses (att sch) STMT 4 | 25,445 | 25,421 | | 15 |
| 24 Total operating and administrative expenses. Add lines 13 through 23 | 31,043 | 27,166 | | 2,868 |
| 25 Contributions, gifts, grants paid | 950,202 | | | 950,202 |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 981,245 | 27,166 | 0 | 953,070 |
| 27 Subtract line 26 from line 12 | -632,454 | | | |
| a Excess of revenue over expenses and disbursements | | 98,993 | | |
| b Net investment income (if negative, enter -0-) | | | | |
| c Adjusted net income (if negative, enter -0-) | | | 0 | |

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

Form **990-PF** (2009)

SCANNED NOV 22 2010

Operating and Administrative Expenses

17917

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 | 3,815 | 3,950 | 3,950 |
| | 2 | Savings and temporary cash investments | 406,349 | 112,056 | 112,056 |
| | 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) STMT 5 | 1,072,014 | 538,778 | 548,977 |
| | b | Investments—corporate stock (attach schedule) SEE STMT 6 | 544,072 | 473,206 | 2,620,089 |
| | c | Investments—corporate bonds (attach schedule) SEE STMT 7 | 550,875 | 1,064,492 | 1,139,988 |
| | 11 | Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶ | | | |
| | 12 | Investments—mortgage loans | | | |
| | 13 | Investments—other (attach schedule) SEE STATEMENT 8 | 589,747 | 341,936 | 329,138 |
| | 14 | Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶ | | | |
| | 15 | Other assets (describe ▶) | | | |
| | 16 | Total assets (to be completed by all filers—see the instructions Also, see page 1, item I) | 3,166,872 | 2,534,418 | 4,754,198 |
| Liabilities | 17 | Accounts payable and accrued expenses | | | |
| | 18 | Grants payable | | | |
| | 19 | Deferred revenue | | | |
| | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| | 21 | Mortgages and other notes payable (attach schedule) | | | |
| | 22 | Other liabilities (describe ▶) | | | |
| | 23 | Total liabilities (add lines 17 through 22) | 0 | 0 | |
| Net Assets or Fund Balances | | Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31. | | | |
| | 24 | Unrestricted | | | |
| | 25 | Temporarily restricted | | | |
| | 26 | Permanently restricted | | | |
| | | Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31. | | | |
| | 27 | Capital stock, trust principal, or current funds | 3,166,872 | 2,534,418 | |
| | 28 | Paid-in or capital surplus, or land, bldg, and equipment fund | | | |
| | 29 | Retained earnings, accumulated income, endowment, or other funds | | | |
| | 30 | Total net assets or fund balances (see page 17 of the instructions) | 3,166,872 | 2,534,418 | |
| | 31 | Total liabilities and net assets/fund balances (see page 17 of the instructions) | 3,166,872 | 2,534,418 | |

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 | 3,166,872 |
| 2 | Enter amount from Part I, line 27a | 2 | -632,454 |
| 3 | Other increases not included in line 2 (itemize) ▶ | 3 | |
| 4 | Add lines 1, 2, and 3 | 4 | 2,534,418 |
| 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 | 2,534,418 |

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

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

| | | | |
|---|---|---|---------|
| 2 Capital gain net income or (net capital loss) | <div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div> | 2 | -79,191 |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) | | 3 | -79,191 |
| <div> <div>If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions)</div> <div>If (loss), enter -0- in Part I, line 8</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 page 18 of the instructions before making any entries

| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio (col. (b) divided by col. (c)) |
|--|--|--|---|
| 2008 | 709,126 | 3,930,987 | 0.180394 |
| 2007 | 532,575 | 4,533,725 | 0.117470 |
| 2006 | 224,850 | 4,090,401 | 0.054970 |
| 2005 | 160,203 | 3,706,578 | 0.043221 |
| 2004 | 25,115 | 2,003,971 | 0.012533 |

| | | |
|--|---|-----------|
| 2 Total of line 1, column (d) | 2 | 0.408588 |
| 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 | 0.081718 |
| 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 | 4 | 3,347,525 |
| 5 Multiply line 4 by line 3 | 5 | 273,553 |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 990 |
| 7 Add lines 5 and 6 | 7 | 274,543 |
| 8 Enter qualifying distributions from Part XII, line 4 | 8 | 953,070 |

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.

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

| | | | |
|-----------|---|----|-------|
| 1a | Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions) | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b | 1 | 990 |
| c | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b) | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 2 | 0 |
| 3 | Add lines 1 and 2 | 3 | 990 |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | 4 | 0 |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | 5 | 990 |
| 6 | Credits/Payments | | |
| a | 2009 estimated tax payments and 2008 overpayment credited to 2009 | 6a | 1,108 |
| b | Exempt foreign organizations—tax withheld at source | 6b | |
| c | Tax paid with application for extension of time to file (Form 8868) | 6c | 500 |
| d | Backup withholding erroneously withheld | 6d | |
| 7 | Total credits and payments. Add lines 6a through 6d | 7 | 1,608 |
| 8 | Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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 | 618 |
| 11 | Enter the amount of line 10 to be Credited to 2010 estimated tax Refunded | 11 | |

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 page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities | | X |
| 1c Did the foundation file Form 1120-POL for this year? | | X |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____ | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____ | | |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities | | X |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | X |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | X |
| 4b If "Yes," has it filed a tax return on Form 990-T for this year? | | |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T | | X |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? | X | |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV | X | |
| 8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) PA | | |
| 8b 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 on page 27)? If "Yes," complete Part XIV | | X |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses | | X |

N/A

Part VII-A Statements Regarding Activities (continued)

| | | | | |
|----|--|--|---|----------------------------|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions) | 11 | | X |
| 12 | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? | 12 | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A | 13 | X | |
| 14 | The books are in care of ► ROBERT L. NAUSE 4718 GETTYSBURG RD Located at ► MECHANICSBURG, PA | Telephone no ► 717-972-1305 ZIP+4 ► 17055 | | |
| 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 checked="" type="checkbox"/> Yes | <input 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 | | 1b X |
| c | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? | | 1c 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 | <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) | | 2b 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 | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| b | If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) | | 3b N/A |
| 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 |

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ N/A **5b**

Organizations relying on a current notice regarding disaster assistance check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ N/A ☐ Yes ☐ No

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

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

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

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ N/A **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (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 |
|---|---|---|---|---------------------------------------|
| ROBERT A. ORTENZIO 1716 OLMSTEAD WAY E. CAMP HILL PA 17011 | TRUSTEE 5.00 | 0 | 0 | 0 |
| ANGELA D. ORTENZIO 1716 OLMSTEAD WAY E. CAMP HILL PA 17011 | TRUSTEE 5.00 | 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 ☐

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."**

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

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

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

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

Expenses

1 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



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 | 3,138,217 |
| b | Average of monthly cash balances | 1b | 260,286 |
| c | Fair market value of all other assets (see page 24 of the instructions) | 1c | 0 |
| d | Total (add lines 1a, b, and c) | 1d | 3,398,503 |
| 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 | 3,398,503 |
| 4 | Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions) | 4 | 50,978 |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 3,347,525 |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 167,376 |

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 | 167,376 |
| 2a | Tax on investment income for 2009 from Part VI, line 5 | 2a | 990 |
| b | Income tax for 2009 (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 990 |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 166,386 |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | |
| 5 | Add lines 3 and 4 | 5 | 166,386 |
| 6 | Deduction from distributable amount (see page 25 of the instructions) | 6 | |
| 7 | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 166,386 |

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 | 953,070 |
| b | Program-related investments—total from Part IX-B | 1b | |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the | | |
| a | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 953,070 |
| 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 | 990 |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 952,080 |

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

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

| | (a) Corpus | (b) Years prior to 2008 | (c) 2008 | (d) 2009 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2009 from Part XI, line 7 | | | | 166,386 |
| 2 Undistributed income, if any, as of the end of 2009 | | | | |
| a Enter amount for 2008 only | | | | |
| b Total for prior years 20____, 20____, 20____ | | | | |
| 3 Excess distributions carryover, if any, to 2009 | | | | |
| a From 2004 | | | | |
| b From 2005 | | | | |
| c From 2006 | | | | |
| d From 2007 | | | 291,270 | |
| e From 2008 | | | 514,789 | |
| f Total of lines 3a through e | 806,059 | | | |
| 4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 953,070 | | | | |
| a Applied to 2008, but not more than line 2a | | | | |
| b Applied to undistributed income of prior years (Election required—see page 26 of the instructions) | | | | |
| c Treated as distributions out of corpus (Election required—see page 26 of the instructions) | | | | |
| d Applied to 2009 distributable amount | | | | 166,386 |
| e Remaining amount distributed out of corpus | 786,684 | | | |
| 5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| 6 Enter the net total of each column as indicated below: | 1,592,743 | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b | | | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | | |
| d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions | | | | |
| e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions | | | | |
| f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 | | | | 0 |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) | | | | |
| 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) | | | | |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a | 1,592,743 | | | |
| 10 Analysis of line 9 | | | | |
| a Excess from 2005 | | | | |
| b Excess from 2006 | | | | |
| c Excess from 2007 | | | 291,270 | |
| d Excess from 2008 | | | 514,789 | |
| e Excess from 2009 | | | 786,684 | |

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

| | | | | | |
|--|----------|---------------|----------|----------|-----------|
| 1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling | | | | | |
| b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5) | | | | | |
| 2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | Tax year | Prior 3 years | | | (e) Total |
| | (a) 2009 | (b) 2008 | (c) 2007 | (d) 2006 | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, line 4 for each year listed | | | | | |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | | | | | |
| e Qualifying distributions made directly for active conduct of exempt activities | | | | | |
| Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the alternative test relied upon | | | | | |
| a "Assets" alternative test—enter | | | | | |
| (1) Value of all assets | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | | | | | |
| c "Support" alternative test—enter | | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from an exempt organization | | | | | |
| (4) Gross investment income | | | | | |

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

ROBERT A. ORTENZIO

- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

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

- a The name, address, and telephone number of the person to whom applications should be addressed

ROBERT A. ORTENZIO 717-972-1305

4718 GETTYSBURG RD - SUITE 405, MECHANICSBURG PA 17055

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

SEE STATEMENT 9

- c Any submission deadlines

APPLICATIONS ARE ACCEPTED AT ANY TIME

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

SEE STATEMENT 10

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

| <div>Recipient</div> <div>Name and address (home or business)</div> | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|--------------------------------|----------------------------------|-----------|
| a Paid during the year SEE SCHEDULE | N/A | PUBLIC ORGANIZATIONS' EXEMPT | PURPOSE | 950,202 |
| Total | | | | 950,202 |
| b Approved for future payment SEE STATEMENT 11 | | | | 3,957,144 |
| Total | | | | 3,957,144 |

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

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

OMB No 1545-0047

2009**Name of the organization**THE ROBERT AND ANGELA ORTENZIO
FAMILY FOUNDATION**Employer identification number**

25-6843186

Organization type (check one)**Filers of:****Section:**

Form 990 or 990-EZ

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

Form 990-PF

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

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

Special Rules

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

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

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

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

Name of organization

THE ROBERT AND ANGELA ORTENZIO

Employer identification number

25-6843186

Part I Contributors (see instructions)

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
|------------|--|--------------------------------|--|
| 1 | ROBERT A. ORTENZIO 1716 OLMSTEAD WAY EAST CAMP HILL PA 17011 | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution) |
| 2 | ROCCO A. ORTENZIO 7 WESTWIND DRIVE LEMOYNE PA 17043 | \$ 300,000 | Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution) |

Name of organization

THE ROBERT AND ANGELA ORTENZIO

Employer identification number

25-6843186

Part II Noncash Property (see instructions)

| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
|---------------------------|--|--|----------------------|
| 1 | 200,000 SHS SELECT MEDICAL HLDGS | \$ 2,081,000 | 12/28/09 |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |

Capital Gains and Losses for Tax on Investment Income

Form **990-PF****2009**

For calendar year 2009, or tax year beginning

, and ending

Name

THE ROBERT AND ANGELA ORTENZIO
FAMILY FOUNDATION

Employer Identification Number

25-6843186

| (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) |
|--|--|------------------------------------|--------------------------------|
| (1) CAPITAL GAIN DISTRIBUTIONS | P | VARIOUS | VARIOUS |
| (2) MARKETABLE SECURITIES | P | VARIOUS | VARIOUS |
| (3) NET LOSS FROM PASS-THRU | P | VARIOUS | VARIOUS |
| (4) 1499.26 SHS SELECT STRATEGY PARTNERS | P | VARIOUS | VARIOUS |
| (5) ADD'L LOSS - US OIL FUND | P | VARIOUS | VARIOUS |
| (6) ADD'L GAIN - POWERSHARES DB | P | VARIOUS | VARIOUS |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| (10) | | | |
| (11) | | | |
| (12) | | | |
| (13) | | | |
| (14) | | | |
| (15) | | | |

| (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) |
|-----------------------|--|---|--|
| (1) 424 | | | 424 |
| (2) 2,715,853 | | 2,768,560 | -52,707 |
| (3) | | 21,742 | -21,742 |
| (4) 204,856 | | 209,058 | -4,202 |
| (5) | | 1,446 | -1,446 |
| (6) 482 | | | 482 |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| (10) | | | |
| (11) | | | |
| (12) | | | |
| (13) | | | |
| (14) | | | |
| (15) | | | |

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)) |
|------------------------|--------------------------------------|---|--|
| (1) | | | 424 |
| (2) | | | -52,707 |
| (3) | | | -21,742 |
| (4) | | | -4,202 |
| (5) | | | -1,446 |
| (6) | | | 482 |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| (10) | | | |
| (11) | | | |
| (12) | | | |
| (13) | | | |
| (14) | | | |
| (15) | | | |

Federal Statements

FYE: 12/31/2009

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

| Description | Revenue per Books | Net Investment Income | Adjusted Net Income |
|----------------------------|----------------------|--------------------------|------------------------|
| LOSS FROM PASS-THRU ENTITY | | | |
| UBTI FROM PASS-THRU ENTITY | \$ -4,648 | \$ -4,648 | \$ |
| | 472 | | |
| TOTAL | \$ -4,176 | \$ -4,648 | \$ 0 |

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|----------------------------------|----------|-------------------|-----------------|-----------------------|
| MARTIN M. SACKS & ASSOCIATES, CP | \$ | \$ | \$ | \$ |
| PREPARATION OF FORM 990-PF | 4,280 | 1,427 | | 2,853 |
| TOTAL | \$ 4,280 | \$ 1,427 | \$ 0 | \$ 2,853 |

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|----------------------------------|----------|-------------------|-----------------|-----------------------|
| EXCISE TAX ON UNRELATED BUSINESS | \$ 1,000 | \$ | \$ | \$ |
| FOREIGN TAX WITHHELD ON DIVIDEND | 318 | 318 | | |
| TOTAL | \$ 1,318 | \$ 318 | \$ 0 | \$ 0 |

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|----------------------------|-------|-------------------|-----------------|-----------------------|
| EXPENSES | \$ | \$ | \$ | \$ |
| ASSET MGMT & CUSTODY FEES | 6,342 | 6,342 | | |
| MISCELLANEOUS | 176 | 161 | | 15 |
| NON-DEDUCTIBLE EXPENSE | 9 | | | |
| DEDUCTIONS FROM INVESTMENT | | | | |

Federal Statements**Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses (continued)**

| Description | Total | Net Investment | Adjusted Net | Charitable Purpose |
|------------------|-----------|----------------|--------------|--------------------|
| PASS-THRU ENTITY | \$ 18,918 | \$ 18,918 | \$ | \$ |
| TOTAL | \$ 25,445 | \$ 25,421 | \$ 0 | \$ 15 |

Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments

| Description | Beginning of Year | End of Year | Basis of Valuation | Fair Market Value |
|-----------------------|-------------------|-------------|--------------------|-------------------|
| SEE ATTACHED SCHEDULE | \$ 1,072,014 | \$ 538,778 | MARKET | \$ 548,977 |
| TOTAL | \$ 1,072,014 | \$ 538,778 | | \$ 548,977 |

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

| Description | Beginning of Year | End of Year | Basis of Valuation | Fair Market Value |
|-----------------------|-------------------|-------------|--------------------|-------------------|
| SEE ATTACHED SCHEDULE | \$ 544,072 | \$ 473,206 | MARKET | \$ 2,620,089 |
| TOTAL | \$ 544,072 | \$ 473,206 | | \$ 2,620,089 |

Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

| Description | Beginning of Year | End of Year | Basis of Valuation | Fair Market Value |
|-----------------------|-------------------|--------------|--------------------|-------------------|
| SEE ATTACHED SCHEDULE | \$ 550,875 | \$ 1,064,492 | MARKET | \$ 1,139,988 |
| TOTAL | \$ 550,875 | \$ 1,064,492 | | \$ 1,139,988 |

Federal Statements**Statement 8 - Form 990-PF, Part II, Line 13 - Other Investments**

| Description | Beginning of Year | End of Year | Basis of Valuation | Fair Market Value |
|--|----------------------|----------------|-----------------------|----------------------|
| LIMITED PARTNERSHIP INTEREST IN INVESTMENT PARTNERSHIP: | \$ | \$ | | \$ |
| SELECT STRATEGY PARTNERS, L.P. | 589,747 | 341,936 | MARKET | 329,138 |
| TOTAL | \$ 589,747 | \$ 341,936 | | \$ 329,138 |

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

Name of Manager

ROBERT A. ORTENZIO

TOTAL

Statement 9 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description

A LETTER STATING REQUEST FOR FUNDS AND EXPLANATION OF
NEED**Statement 10 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

Description

GRANTS ARE PRIMARILY TO CHARITABLE ORGANIZATIONS
SUPPORTING THE ARTS; PROVIDING HEALTHCARE, EDUCATION, OR
IMPROVED QUALITY OF LIFE TO THOSE IN NEED; AND/OR
SUPPORTING OTHER CHARITABLE OR EDUCATIONAL PURPOSES. THE
FOUNDATION DOES NOT EXPECT TO MAKE GRANTS TO INDIVIDUALS.**Statement 11 - Form 990-PF, Part XV, Line 3b - Grants and Contributions Approved for
Future Pmt**

| Name | Address | Address | |
|--------------------------|--------------------------|--------------------------------------|-----------|
| Relationship | Status | Purpose | Amount |
| GETTYSBURG COLLEGE | 300 N. WASHINGTON STREET | GETTYSBURG PA 17325 | |
| N/A | PUBLIC | ATHLETICS, RECREATION & FITNESS CENT | 1,800,000 |
| HARRISBURG UNIVERSITY OF | 326 MARKET STREET | HARRISBURG PA 17101 | |
| N/A | PUBLIC | CONSTRUCT EDUCATIONAL FACILITY | 757,145 |

**Statement 11 - Form 990-PF, Part XV, Line 3b - Grants and Contributions Approved for
Future Pmt (continued)**

| Name | Address | Address | |
|---------------------------|-------------------|--------------------------------|------------------|
| Relationship | Status | Purpose | Amount |
| THE PENNSYLVANIA ST. UNIV | ONE OLD MAIN | UNIVERSITY PARK PA 16802 | |
| N/A | PUBLIC | CONSTRUCT BUILDING | 199,999 |
| UNIVERSITY OF NOTRE DAME | 405 MAIN BUILDING | NOTRE DAME IN 46556 | |
| N/A | PUBLIC | CONSTRUCT EDUCATIONAL FACILITY | 1,200,000 |
| TOTAL | | | <u>3,957,144</u> |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10a, INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS -
BEGINNING OF YEAR:

| <u>Symbol</u> | <u>Trade Date</u> | <u>Quantity</u> | <u>Description</u> | <u>Unit Cost</u> | <u>Cost Basis</u> |
|-------------------------|-----------------------|-----------------|---|----------------------|-----------------------|
| FIXED INCOME | | | | | |
| Government Bonds | | | | | |
| 3128X4N56 | 09/05/2006 | 100,000 | Freddie Mac 02/24/2011 5.25 Call 02/24/2009, Accrued Income | 99 80 | 99,801.00 |
| 31331VYF7 | 05/12/2006 | 100,000 | Fed Farm Credit 05/04/2009 5 25 Accrued Income | 99 94 | 99,936 00 |
| 31331YR85 | 05/23/2008 | 100,000 | Federal Farm Cre 05/23/2013 4.25 Call 11/23/2009, Accrued Income | 100 00 | 100,000.00 |
| 313385LD6 | 09/19/2008 | 100,000 | FHLB Discount N 09/01/2009 2.95 | 97 28 | 97,276.67 |
| 3133XGXP4 | 09/11/2006 | 100,000 | Federal Home Lo 09/20/2011 5 32 Call 03/20/2009, Accrued Income | 100.00 | 100,000 00 |
| 3133XK2N4 | 08/24/2007 | 100,000 | Federal Home Lo 03/06/2012 5.33 Call 03/06/2009, Accrued Income | 100.00 | 100,000 00 |
| 3133XKQS7 | 05/02/2007 | 150,000 | Federal Home Lo 05/07/2012 5 05 Call 05/07/2010, Accrued Income | 100.00 | 150,000.00 |
| 3136F8VW2 | 10/26/2007 | 225,000 | Fannie Mae 11/05/2012 5.05 Call 02/05/2009, Accrued Income | 100 00 | 225,000 00 |
| PTTDX | 03/26/2008 | 9,191 176 | PIMCO Total Ret | 10 88 | 100,000.00 |
| | | | | | <u>1,072,013.67</u> |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10a, INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS -
END OF YEAR:

| <u>Symbol</u> | <u>Trade Date</u> | <u>Quantity</u> | <u>Description</u> | <u>Unit Cost</u> | <u>Cost Basis</u> | <u>Current Price</u> | <u>Current Value</u> |
|-------------------------|-----------------------|-----------------|--|----------------------|-----------------------|--------------------------|--------------------------|
| FIXED INCOME | | | | | | | |
| Government Bonds | | | | | | | |
| 3133XKQS7 | 05/02/2007 | 150,000 | Federal Home Lo 05/07/2012 5 05 Call 05/07/2010, Accrued Income | 100 00 | 150,000.00 | 101.59 | 152,390 63 |
| DODIX | 06/11/2009 | 4,192.142 | Dodge & Cox Inc | 12 41 | 52,030 71 | 12.96 | 54,330.16 |
| PTTDX | 03/26/2008 | 9,191 176 | PIMCO Total Ret | 10 88 | 100,000.00 | 10 80 | 99,264 70 |
| PUBDX | 06/11/2009 | 9,514.748 | Pimco Unconstrai | 10 51 | 100,000 00 | 10 80 | 102,759 28 |
| VBISX | 01/22/2009 | 6,563 799 | Vanguard Short T | 10 30 | 67,607 12 | 10.42 | 68,394 79 |
| VBTSX | 01/22/2009 | 6,831 047 | Vanguard Total B | 10 12 | 69,140 21 | 10 35 | 70,701 34 |
| | | | | | <u>538,778 04</u> | | <u>548,977.15</u> |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10b, INVESTMENTS - CORPORATE STOCK - BEGINNING OF YEAR:

| <u>Symbol</u> | <u>Trade Date</u> | <u>Quantity</u> | <u>Description</u> | <u>Unit Cost</u> | <u>Cost Basis</u> |
|----------------------|-----------------------|-----------------|--------------------|----------------------|--------------------------|
| EQUITIES | | | | | |
| Large Cap | | | | | |
| DIA | 09/30/2008 | 770 | Dow Diamonds | 102.96 | 79,278.20 |
| PASDX | 03/13/2008 | 5,226.901 | Pimco All Asset - | 12.69 | 66,355.11 |
| PRPFX | 05/07/2008 | 1,892.214 | Permanent Portfol | 37.51 | 70,977.21 |
| PRWCX | 08/29/2008 | 1,778.455 | T Rowe Price Ca | 19.68 | 35,000.00 |
| SPY | 02/13/2004 | 645 | S&P 500 Spiders | 106.43 | 68,647.50 |
| | | | | | <u>320,258.02</u> |
| Mid Cap | | | | | |
| FAIRX | 08/14/2007 | 1,119.001 | Fairholme Fund | 30.68 | 34,330.96 |
| FPACX | 03/30/2005 | 1,519.071 | FPA Crescent Fun | 24.41 | 37,085.28 |
| | | | | | <u>71,416.24</u> |
| Small Cap | | | | | |
| IJR | 10/06/2008 | 400 | iShares SC S&P 6 | 52.09 | 20,836.48 |
| VB | 08/14/2008 | 750 | Vanguard Small | 66.54 | 49,905.00 |
| | | | | | <u>70,741.48</u> |
| International | | | | | |
| EACFX | 04/19/2004 | 3,350.366 | Evergreen Asset | 12.34 | 41,345.88 |
| SGENX | 02/23/2005 | 982.608 | First Eagle Global | 41.02 | 40,310.49 |
| | | | | | <u>81,656.37</u> |
| | | | | | <u><u>544,072.11</u></u> |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10b, INVESTMENTS - CORPORATE STOCK - END OF YEAR:

| <u>Symbol</u> | <u>Trade Date</u> | <u>Quantity</u> | <u>Description</u> | <u>Unit Cost</u> | <u>Cost Basis</u> | <u>Current Price</u> | <u>Current Value</u> |
|-------------------------|-------------------|-----------------|---------------------|------------------|-------------------|----------------------|----------------------|
| EQUITIES | | | | | | | |
| Large Cap | | | | | | | |
| DIA | 07/08/2009 | 340 | Dow Diamonds | 89 05 | 30,275 30 | 104 07 | 35,383 80 |
| HSGFX | 01/07/2009 | 3,879.162 | Hussman Strategi | 12 89 | 49,993.20 | 12 78 | 49,575 69 |
| PASDX | 04/16/2008 | 3,653 252 | Pimco All Asset - | 12 07 | 44,097 06 | 11 43 | 41,756 67 |
| PRWCX | 11/03/2009 | 2,271.437 | T Rowe Price Ca | 17 61 | 40,000 00 | 18 16 | 41,249.30 |
| TIBIX | 01/07/2009 | 3,384 8 | Thornburg Invest | 15 13 | 51,200 32 | 17 95 | 60,757 16 |
| VBINX | 11/16/2009 | 2,074 524 | Vanguard Balance | 19.43 | 40,308 80 | 19 35 | 40,142 04 |
| VWINX | 11/03/2009 | 2,025.382 | Vanguard Wellesl | 19 98 | 40,476.48 | 20 37 | 41,257 03 |
| XLP | 10/20/2009 | 570 | Amex Consumer | 26 67 | 15,201 90 | 26 47 | 15,087 90 |
| XLU | 10/20/2009 | 500 | Utilities Select Se | 29 87 | 14,935.00 | 31 02 | 15,510 00 |
| XLV | 10/20/2009 | 510 | Health Care Selec | 29 45 | 15,019 50 | 31 07 | 15,845 70 |
| | | | | | 341,507 56 | | 356,565 29 |
| Mid Cap | | | | | | | |
| IVWCX | 11/16/2009 | 2,735 984 | IVA Worldwide | 14 96 | 40,942.95 | 14 66 | 40,109 53 |
| Small Cap | | | | | | | |
| SEM | 02/05/1997 | 200,000 | Select Medical Co | 0 00 | 0 00 | 10 62 | 2,124,000 00 |
| International | | | | | | | |
| EACFX | 04/19/2004 | 4,022 325 | Evergreen Asset | 11 59 | 46,604 71 | 11 04 | 44,406 47 |
| SGENX | 02/23/2005 | 644.084 | First Eagle Global | 39 95 | 25,729 18 | 39 98 | 25,750 48 |
| | | | | | 72,333 89 | | 70,156.95 |
| Emerging Markets | | | | | | | |
| EEM | 03/26/2009 | 705 | iShares MSCI Em | 26 13 | 18,421 65 | 41 50 | 29,257 50 |
| | | | | | 473,206 05 | | 2,620,089.27 |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10c, INVESTMENTS - CORPORATE BONDS - BEGINNING OF YEAR:

| <u>Symbol</u> | <u>Trade Date</u> | <u>Quantity</u> | <u>Description</u> | <u>Unit Cost</u> | <u>Cost Basis</u> |
|-------------------------------|-------------------|-----------------|---|------------------|--------------------------|
| FIXED INCOME | | | | | |
| Certificate of Deposit | | | | | |
| 02341VWQ4 | 11/25/2008 | 50,000 | Amcore Bank CD 06/03/2010 3 95 Accrued Income | 100.00 | 50,000 00 |
| 17284PKF1 | 06/01/2006 | 69,000 | CIT Bank CD 06/08/2009 5 30 Accrued Income | 100.00 | 69,000 00 |
| 320432AU1 | 03/19/2007 | 99,000 | First Guaranty Ba 03/29/2010 5.00 Accrued Income | 100.00 | 99,000 00 |
| 446438JX2 | 12/08/2008 | 50,000 | Huntington Natio 06/14/2010 3.55 Accrued Income | 100.00 | 50,000.00 |
| 69912SBG4 | 07/08/2008 | 50,000 | Paragon National 01/19/2010 4.05 Accrued Income | 100.00 | 50,000 00 |
| | | | | | <u>318,000 00</u> |
| Corporate Bonds | | | | | |
| 073902CF3 | 10/17/2008 | 20,000 | JP Morgan Corpo 03/25/2009 3.25 Accrued Income | 98 75 | 19,750 00 |
| 172967CN9 | 10/16/2008 | 20,000 | Citigroup Inc 07/29/2009 4 25 Accrued Income | 98 05 | 19,610 00 |
| 38141GAD6 | 10/16/2008 | 20,000 | Goldman Sachs 10/01/2009 7 35 Accrued Income | 99 97 | 19,994.20 |
| 5526E0AL7 | 10/20/2008 | 20,000 | Bank of America 08/03/2009 4 625 Accrued Income | 99 00 | 19,800 00 |
| 59018YUH2 | 12/09/2008 | 20,000 | Bank of America 09/10/2009 4 125 Accrued Income | 98 62 | 19,723.20 |
| 693476AP8 | 11/24/2008 | 35,000 | PNC Corp 11/01/2009 7.50 Accrued Income | 99.70 | 34,895 00 |
| 816196AJ8 | 12/04/2008 | 100,000 | Select Medical Co 02/01/2015 7 625 Call 02/01/2010, Accrued Income | 59 70 | 59,700.00 |
| 867914AY9 | 12/18/2008 | 20,000 | Suntrust Banks 10/15/2009 4.25 Accrued Income | 99 95 | 19,990 00 |
| 98151GAA3 | 12/02/2008 | 20,000 | Wells Fargo 12/15/2009 4 125 Accrued Income | 97 06 | 19,412.50 |
| | | | | | <u>232,874 90</u> |
| | | | | | <u><u>550,874.90</u></u> |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10c, INVESTMENTS - CORPORATE BONDS - END OF YEAR:

FIXED INCOME

| | | | | | | | |
|-------------------------------|------------|--------|--------------------------------------|--------|-------------------|--------|-------------------|
| Certificate of Deposit | | | | | | | |
| 02341VWQ4 | 11/25/2008 | 50,000 | Amcore Bank CD 06/03/2010 3 95 | 100 00 | 50,000 00 | 100 00 | 50,000 00 |
| | | | Accrued Income | | | | 162 58 |
| 105133EF5 | 02/26/2009 | 50,000 | Branch Banking 03/11/2011 2 50 | 100 00 | 50,000 00 | 100 00 | 50,000 00 |
| | | | Accrued Income | | | | 385 02 |
| 320432AU1 | 03/19/2007 | 99,000 | First Guaranty Ba 03/29/2010 5 00 | 100 00 | 99,000 00 | 100 00 | 99,000 00 |
| | | | Accrued Income | | | | 27 50 |
| 446438JX2 | 12/08/2008 | 50,000 | Huntington Natio 06/14/2010 3 55 | 100 00 | 50,000 00 | 100 00 | 50,000.00 |
| | | | Accrued Income | | | | 97.35 |
| 69912SBG4 | 07/08/2008 | 50,000 | Paragon National 01/19/2010 4 05 | 100 00 | 50,000 00 | 100 00 | 50,000 00 |
| | | | Accrued Income | | | | 946 40 |
| 86789VHM2 | 05/18/2009 | 75,000 | Suntrust Bank CD 05/28/2014 4 00 | 100 00 | 75,000 00 | 100 00 | 75,000 00 |
| | | | Accrued Income | | | | 279 96 |
| | | | | | <u>374,000 00</u> | | <u>375,898 81</u> |
| Foreign Bond | | | | | | | |
| Q081859B0 | 12/15/2009 | 25,000 | Australian Govern 06/15/2011 5 40 | 92 98 | 23,244 60 | 91 62 | 22,905 00 |
| | | | Accrued Income | | | | 63 05 |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART II, LINE 10c, INVESTMENTS - CORPORATE BONDS - END OF YEAR (CONTINUED):

| <u>Symbol</u> | <u>Trade Date</u> | <u>Quantity</u> | <u>Description</u> | <u>Unit Cost</u> | <u>Cost Basis</u> | <u>Current Price</u> | <u>Current Value</u> |
|------------------------|-------------------|-----------------|---|------------------|-------------------|----------------------|-----------------------|
| Corporate Bonds | | | | | | | |
| 02209SAF0 | 02/10/2009 | 30,000 | Phillip Morris Co 06/22/2010 7 125 Accrued Income | 103 50 | 31,050 00 | 102 80 | 30,840 00 53.44 |
| 084664BK6 | 03/31/2009 | 20,000 | Berkshire Hathaw 04/15/2012 4 00 Accrued Income | 100 46 | 20,091 00 | 104 80 | 20,959 40 168 89 |
| 126650BG4 | 04/02/2009 | 25,000 | CVS Corp Bond 06/01/2010 1 561 Accrued Income | 97.18 | 24,296 00 | 100 04 | 25,010 35 228 68 |
| 22541LBJ1 | 01/08/2009 | 25,000 | Credit Suisse First 08/15/2010 0 472 Accrued Income | 95 90 | 23,975 00 | 100 09 | 25,023 58 15 09 |
| 36962G2S2 | 05/06/2009 | 40,000 | General Electric C 12/01/2010 5 00 Accrued Income | 102 22 | 40,888 80 | 104 00 | 41,600 24 166 67 |
| 36962GR89 | 12/15/2009 | 25,000 | General Electric F 07/27/2012 0 451 Accrued Income | 97 46 | 24,365 50 | 97 68 | 24,419 50 20 71 |
| 38141GAZ7 | 03/19/2009 | 20,000 | Goldman Sachs 01/15/2011 6 875 Accrued Income | 101 67 | 20,333 00 | 106 04 | 21,208 52 634 03 |
| 38141GBU7 | 05/20/2009 | 20,000 | Goldman Sachs 11/15/2012 6 00 Accrued Income | 105.57 | 21,113 20 | 108 71 | 21,742 78 553 33 |
| 38141GEF7 | 03/18/2009 | 40,000 | Goldman Sachs 01/15/2011 5 00 Accrued Income | 98 75 | 39,500 00 | 104 15 | 41,660 00 923 91 |
| 46625HDD9 | 03/26/2009 | 20,000 | JP Morgan Chase 01/17/2011 4 60 Accrued Income | 100 16 | 20,032 87 | 103.46 | 20,691 68 429 33 |
| 617446GM5 | 06/10/2009 | 35,000 | Morgan Stanley 04/15/2011 6 75 Accrued Income | 104 81 | 36,682 45 | 106 15 | 37,152 50 498 75 |
| 61746SBC2 | 01/07/2009 | 35,000 | Morgan Stanley 01/15/2010 4 00 Accrued Income | 99 00 | 34,650 00 | 100 07 | 35,025.45 645 56 |
| 635405AW3 | 02/05/2009 | 30,000 | PNC Convertible B 02/01/2011 4 00 Accrued Income | 93 88 | 28,162 50 | 101 88 | 30,562 50 500 00 |
| 69352JAC1 | 05/05/2009 | 40,000 | PPL Electric Utili 11/01/2011 6.40 Accrued Income | 104 60 | 41,840 00 | 107 45 | 42,980 88 426 67 |
| 816196AJ8 | 12/04/2008 | 100,000 | Select Medical Co 02/01/2015 7 625 Call 02/01/2010, Accrued Income | 59 70 | 59,700 00 | 97 25 | 97,250 00 3,177.08 |
| 91324PAV4 | 02/19/2009 | 25,000 | United Health Gr 06/21/2010 1 705 Call 03/21/2010, Accrued Income | 96 75 | 24,187 50 | 99 84 | 24,960 45 3,177.08 |
| PHYDX | 06/11/2009 | 6,901.829 | Pimco High Yield | 7 64 | 52,702 35 | 8 80 | 60,736 10 |
| VFSTX | 02/12/2009 | 12,356 444 | Vanguard Short T | 10 01 | 123,677 30 | 10 59 | 130,854 74 |
| | | | | | 667,247 47 | | 741,120 81 |
| | | | | | 1,064,492.07 | | 1,139,987.67 |

THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION

25-6843186

FORM 990-PF - 2009

PART XV. LINE 3a. CONTRIBUTIONS PAID:

| | | |
|------------|---|-------------------|
| 4/1/2009 | Bishop McDevitt High School 2200 Market Street Harrisburg, PA 17103 (717) 236-7973 | \$ 1,000 |
| 6/8/2009 | Trustees of University of Pennsylvania 433 Franklin Building 3451 Walnut Street Philadelphia, PA 19104 (215) 898-2672 | \$ 20,000 |
| 6/19/2009 | Special Olympics Pennsylvania, Inc 124 Washington Square 2570 Boulevard of the Generals Norristown, PA 19403 (610) 630-9450 | \$ 1,250 |
| 10/1/2009 | Hospice of Central PA P O Box 266 Enola, PA 17025 (717) 732-1000 | \$ 1,000 |
| 10/27/2009 | Life Beyond Cancer Foundation 10101 Woodloch Forest Drive The Woodlands, TX 77380 (281) 863-6582 | \$ 2,000 |
| 11/16/2009 | Harrisburg University of Science and Technology 326 Market Street Harrisburg, PA 17101 (717) 901-5100 | \$ 189,285 |
| 11/16/2009 | Gettysburg College 300 N Washington Street Gettysburg, PA 17325 (717) 337-6500 | \$ 350,000 |
| 11/16/2009 | Gettysburg College 300 N. Washington Street Gettysburg, PA 17325 (717) 337-6500 | \$ 19,000 |
| 11/19/2009 | The Pennsylvania State University One Old Main University Park, PA 16802 (877) 888-5646 | \$ 66,667 |
| 12/10/2009 | University of Notre Dame 405 Main Building Notre Dame, IN 46556 (574) 631-6122 | <u>\$ 300,000</u> |

Total Donations - 2009

\$ 950,202

Form **8868**

(Rev. April 2009)

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

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)**

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

Part I only ☐

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

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

| | | |
|--|--|---|
| Type or print File by the due date for filing your return. See instructions | Name of Exempt Organization THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION | Employer identification number 25-6843186 |
| | Number, street, and room or suite no. If a P.O. box, see instructions 4718 GETTYSBURG ROAD - SUITE 405 | |
| | City, town or post office, state, and ZIP code. For a foreign address, see instructions MECHANICSBURG PA 17055 | |

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

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

- The books are in the care of ►

Telephone No. ►

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/15/10**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
 ► ☒ calendar year **2009** or
 ► ☐ tax year beginning _____, and ending _____

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

| | | | |
|--|----|----|--------------|
| 3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions | 3a | \$ | 1,608 |
| b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit | 3b | \$ | 1,108 |
| c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions | 3c | \$ | 500 |

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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1)

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

| | | |
|---|---|---|
| Type or print File by the extended due date for filing the return See instructions | Name of Exempt Organization THE ROBERT AND ANGELA ORTENZIO FAMILY FOUNDATION | Employer identification number 25-6843186 |
| | Number, street, and room or suite no. If a P.O. box, see instructions 4718 GETTYSBURG ROAD - SUITE 405 | For IRS use only |
| | City, town or post office, state, and ZIP code For a foreign address, see instructions MECHANICSBURG PA 17055 | |

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

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

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

• The books are in the care of **▶ ROBERT L. NAUSE**

Telephone No **▶ 717-972-1305**

FAX No. **▶**

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) **▶**

If this is

for the whole group, check this box ☐

If it is for part of the group, check this box ☐

and attach a

list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **11/15/10**

5 For calendar year **2009**, or other tax year beginning

, and ending

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

7 State in detail why you need the extension

ADDITIONAL TIME IS REQUESTED TO GATHER INFORMATION TO PREPARE A COMPLETE AND ACCURATE RETURN.

| | | | |
|--|----|----|-------|
| 8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions | 8a | \$ | 1,608 |
| b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868 | 8b | \$ | 1,608 |
| c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions | 8c | \$ | 0 |

Signature and Verification

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

Signature **▶ Richard A. Bluff**

Title **▶ CPA**

Date **▶ 08/11/10**

Form **8868** (Rev 4-2009)